MY TRIP PHASE II
Planning Scenarios

CHAMPAIGN COUNTY
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REGIONAL
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CONTENTS

CHAPTER 2: Evaluating the Performance of Your Rural Transit Service

MY TRIP PHASE I AND II

Mobility Yes! Transit Riders Information Project (MY TRIP) was a two-year Federal Transit Administration (FTA) United We Ride State Mobility Management Coordination grant that was awarded to Illinois as a pilot community program to increase mobility for rural areas. The grant period extended from May 1, 2010 until April 30, 2012. During this two-year grant, Mobility Coaches created a "Transit Toolkit" that offers a set of resources to develop, improve and evaluate transit services. The Toolkit includes a Mobility Management library, a set of tools and templates to help rural transit systems develop infrastructure for mobility management and ensure outreach to customers; and a framework for conducting rural travel trainings. Also, as part of MY TRIP 1, Mobility Coaches provided rural travel training to help non-riders become more comfortable with public transportation.

MY TRIP 2 was a two-year Federal Transit Administration (FTA) and State of Illinois funded New Freedom Grant to streamline the processes to be implemented to effectively use the tools and templates created under MY TRIP to help rural transit systems develop infrastructure for mobility management and ensure outreach to customers. The grant also provided funding for creating a framework for conducting rural travel trainings. The grant period extended from July 1, 2013 until June 30, 2015.

Chapter 1

Establishing a Non-Profit Organization for the Provision of Rural Transit Service

1.1 RESEARCH

Before establishing a non-profit to provide transportation, you first need to research the types of transportation that are in demand in your desired community. Rural communities are becoming more diverse; different segments of the population may require different types of transportation services. Some groups that may require special transportation accommodations include older adults, persons with disabilities, persons with low income, as well as culturally and ethnically diverse groups. The hyperlinked bibliography below provides information and guides for meeting the mobility needs of each segment of the rural communities.

LITERATURE REVIEW

General Public

Methods for Forecasting Demand and Quantifying Need for Rural Passenger Transportation: Final Workbook (2013) by Transit Cooperative Research Program

Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service (2012) by National Cooperative Highway Research Program

A Guide for Planning and Operating Flexible Public Transportation Services (2010) by Transit Cooperative Research Program

Guidebook for Rural Demand-Response Transportation: Measuring, Assessing and Improving Performance (2009) by Transit Cooperative Research Program

Rural Transportation Planning Guidebook (2004) by Center for Transportation Training and Research

Technology in Rural Transit: Linking People with Their Community (2002) by Harvard Design and Mapping Company

Older Adults

Choices for Mobility Independence: Transportation Options for Older Adults (2012) by National Center on Senior Transportation

Making Transportation More Affordable for Older Adults (2011) by Joblinks Employment Transportation Center

Programs that Match Seniors with Volunteer Drivers: Practical Recommendations for Organizations and Policy Makers (2008) by National Center for Transit Research

How to Establish and Maintain Door-Through-Door Transportation Services for Seniors (2005) by WESTAT and The Beverly Foundation

Senior Transportation: Toolkit and Best Practices (2003) by The Community Transportation Association of America

A Solutions Package for Adult Day Services Transportation Programs by Easter Seals

Transportation Escorts for Seniors: An Addendum to A Solutions Package for Volunteer Transportation Programs by Easter Seals

Persons with Disabilities

Rural Transportation Voucher Program for People with Disabilities: Three Case Studies (1999) by Brad Bernier (Access Alaska) and Tom Seekins (Research and Training Center on Rural Rehabilitation, The University of Montana)

Equity in Transportation for People with Disabilities by The American Association of People With Disabilities

National Summit on Transportation For People With Disabilities in Rural Settings by Indiana Governor's Council for People With Disabilities

Persons with Low Incomes

Rural Rides: Providing Rideshare Matching, Volunteer Drivers and Other Solutions for Low Income Earners (2010) by JobLinks Employment Transportation Center

The Stranded Poor: Recognizing the Importance of Public Transportation for Low Income Households (2008) by National Association for State Community Services Programs

Transporting Low Income Workers to a Better Future in Rural Oregon (2007) by Sreya Sarkar (Cascade Policy Institute)

Transportation Affordability for Low Income Populations: A Review of the Research Literature, Ongoing Research Projects, and San Francisco Bay Area Transportation Assistance Programs (2002) by Lynn Scholl

Culturally and Ethnically Diverse Groups

How to Engage Low-Literacy and Limited-English Proficiency Populations in Transportation Decision Making (2006) by PBS&J

Everyone Rides: Transportation Access for Culturally and Ethnically Diverse Elders by The National Center on Senior Transportation

Transportation For Persons with Limited English Proficiency: Updated Federal Guidance and Instruction With Discussion of Implementation and Examples of Useful Practices by The Community Transportation Association

INVENTORY OF EXISTING SERVICES

After completing a literature review of the current service in rural transportation, a thorough inventory of existing transportation services by government entities, nonprofit organizations, and private businesses. GuideStar at http://www.guidestar.org/AdvancedSearch.aspx has a searchable online database of nonprofit organizations. Results can be filtered by state or keyword.

A resource specific to Illinois is the network of local Human Service Transportation Plan (HSTP) Coordinators. Figure 1 illustrates the HSTP regions and lists contact information for the coordinators. Figure 2 shows the existing public transportation systems, both rural and urban, in Illinois.

Illinois HSTP Region 8 is a 12-county region in East Central Illinois (see Figure 1). The Illinois Region 8 Transportation Provider Database at http://ecihstp.cuuats.org/ lists all transportation providers in Region 8. This database also lists contact information, service hours, service area, eligible trips, eligible passengers and a number of other service parameters.

Figure 1

Human Service Transportation Plan (HSTP)
Coordinators & Contact Information

Chicago Areas
Regional Transportation Authority
www.rtachicago.org

Regions 1 & 3
North Central Illinois Council of Governments
www.ncicg.org

Region 2
Bi-State Regional Commission
http://bistateonline.org

Regions 4 & 7
Western Illinois Regional Council
www.wirpc.org

Region 5
Tri-County Regional Planning Commission
www.tricountyrpc.org

Region 6
McLean County Regional Planning Commission
www.mcplan.org

Region 8
Champaign County Regional Planning Commission
www.ecihstp.org

Regions 9, 10, & 11
South Central Illinois Regional Planning & Development Commission
www.sihstp.blogspot.com

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Figure 2

Illinois Public Transit Systems

Legend

**Indicates System Not Started Yet

--Indicates Countywide Service Unavailable

☎ Rural Countywide Bus System

County's color indicates a call-ahead transit system exists.

🔺 Rural Municipal Bus System

◼ Small Urbanized Fixed-Route Bus System

⬟ Large Urbanized Fixed-Route Bus System

***Transportation Service Disclaimer**
When a countywide rural system and an urbanized fixed-route system exist within one county, there are un-served "gray areas" that are commonly known as "suburbs". These grey areas may not be covered by either the rural or urban operator. Therefore, always verify available transportation services directly with an operator at least 72 hours in advance.

Interactive map can be found at
www.ecihstp.org/transportation
Intercity Bus Trip Planner can be found at
www.illinoisbusnetwork.com

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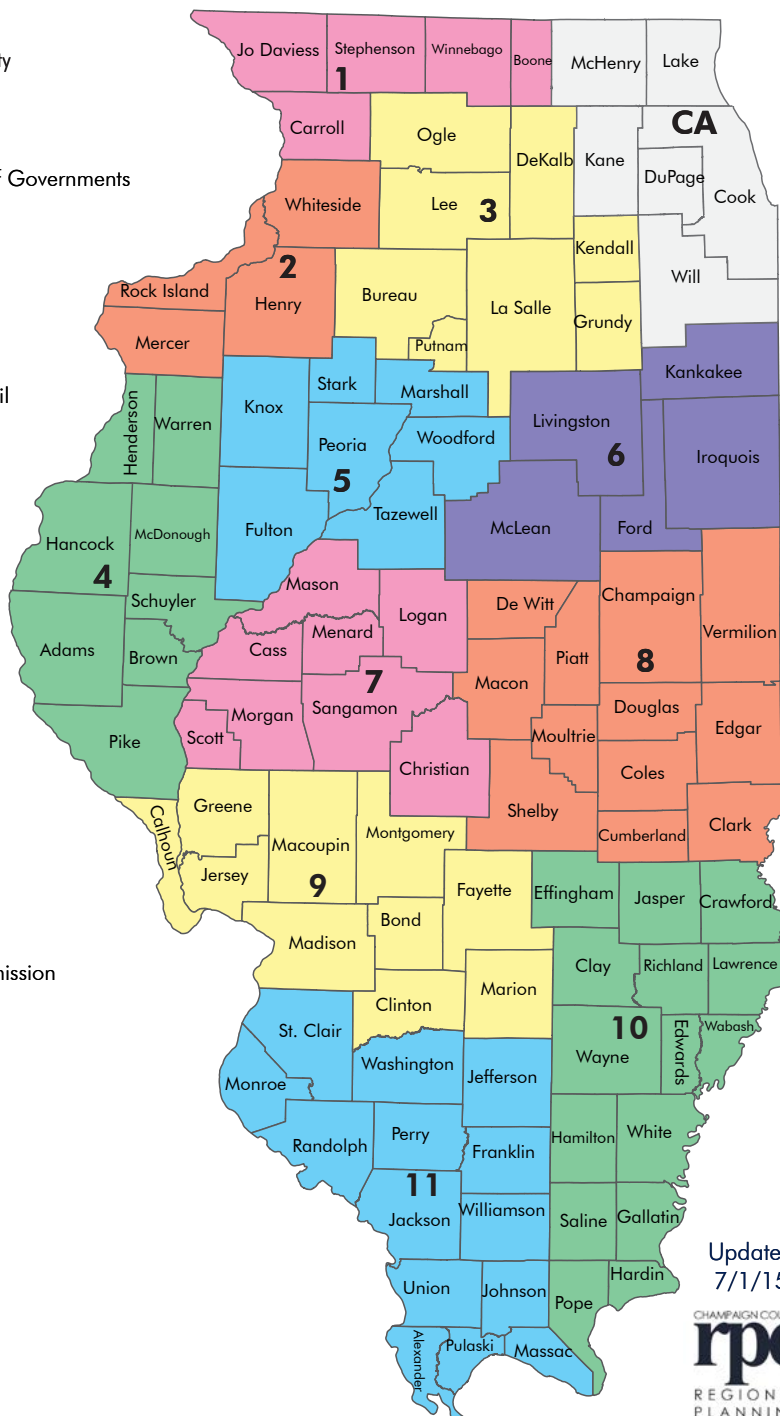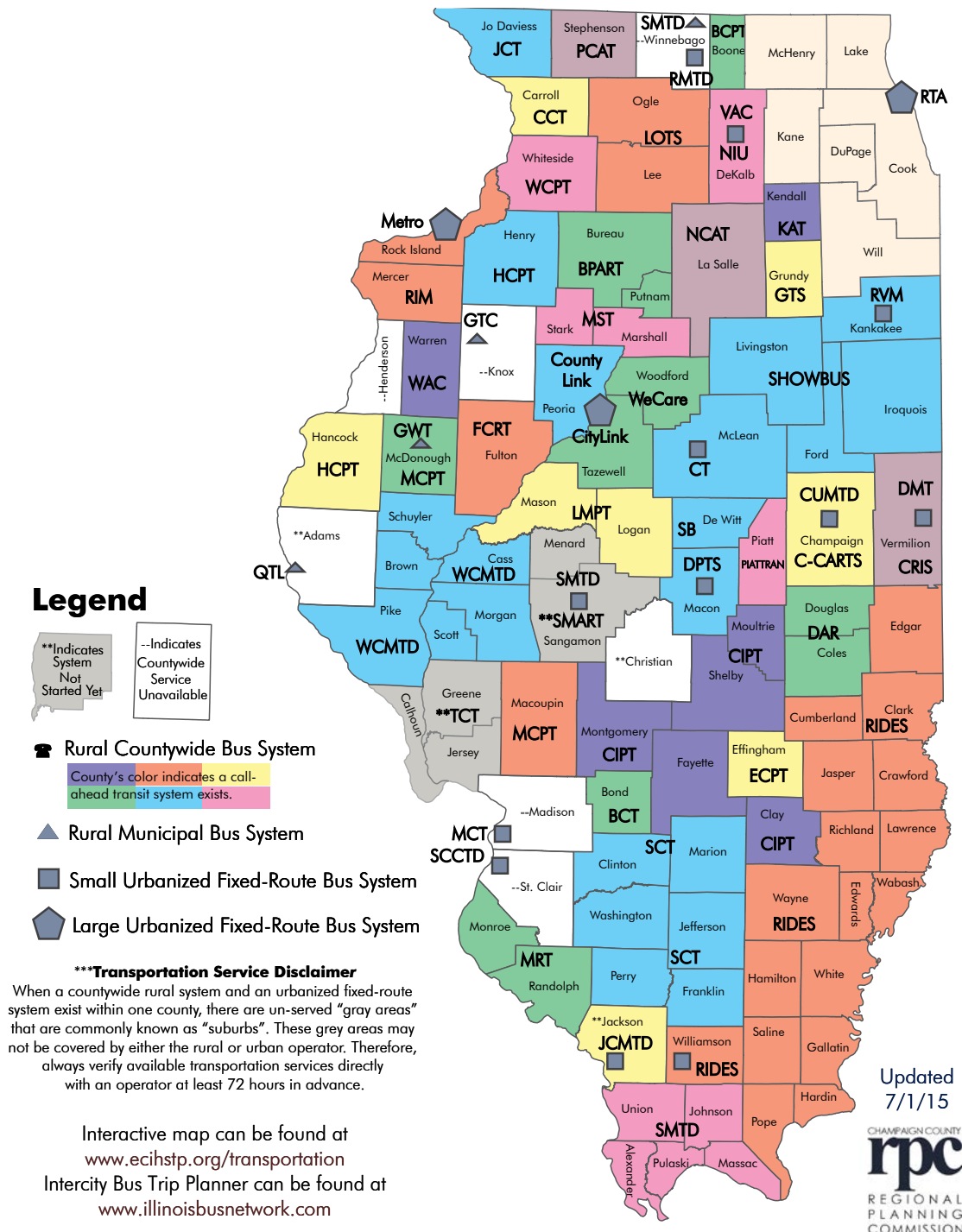
SOCIO-ECONOMIC CONDITIONS

To assess the need and demand for transportation services in a particular region, you will need to obtain existing socio-economic information for your community; certain groups require specific types of transportation. Groups that often require special transportation assistance include older adults, persons with disabilities aged 18-64, low income persons and persons living in zero-vehicle households. You will need to know the total population in addition to the number of persons that are within the groups listed above. Distribution of these demographic characteristics throughout your community will also be helpful. U.S. Census and American Community Survey (ACS) data should be collected at the block group level and joined with block group shapefiles for your study area obtained from the US Census TIGER/Line shapefile website at https://www.census.gov/cgi-bin/geo/shapefiles2014/main. Data for these demographic characteristics can be obtained from the U.S. Census website at http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml.

Census data may not be the most accurate source of demographic data for small communities, especially datasets that utilize the American Community Survey estimates instead of the actual Decennial Census data; therefore, a community survey is recommended. The U.S. Department of Transportation Federal Highway Administration (FHWA)'s National Household Travel Survey, available at http://nhts.ornl.gov/introduction.shtml, gathers community demographic, economic, and travel behavior characteristics, which will be useful for estimating need and demand for transportation services.

When tallying the number of persons in zero-vehicle households and households below the poverty line, the total number needs to be multiplied by the number of persons in the household. Tables 1 and 2 illustrate how these figures should be multiplied.

Table 1 | **How to Calculate Total Number of Persons with Zero Access to a Vehicle**

Household Size	Zero Vehicle	Multiplier	Total Persons with No Access to a Vehicle
One Person	1,456	1	1,456
Two Person	2,682	2	5,364
Three Person	326	3	652
Total Persons with No access to a vehicle			**7,272**

Source: TCRP Report 161, Methods for Forecasting Demand and Quantifying Need for Rural Passenger Transportation (2013)

Table 2 | **How to Calculate Total Number of Persons Living Below the Poverty Line**

Household Size	Below Poverty Line	Multiplier	Total Persons Below Poverty Line
One Person	534	1	534
Two Person	976	2	1,952
Three Person	1,130	3	3,390
Total Persons Living Below Poverty Line			**5,876**

Source: TCRP Report 161, Methods for Forecasting Demand and Quantifying Need for Rural Passenger Transportation (2013)

TRIP GENERATORS

Major trip generators need to be mapped in order to gain an idea of the major destinations in a community. Types of entities that are considered major trip generators include the following:

- Major employers;
- Multi-family housing;
- Schools;
- Churches;
- Shopping centers and malls;
- Grocery stores;
- Libraries;
- Major sporting facilities;
- Hospitals, medical centers, etc.;
- Major transit hubs (Amtrak stations, bus transfer stations etc.); and
- Parks and recreation facilities.

NEED, DEMAND, GAP AND UNMET NEEDS

Inventory of existing services, socio economic data, and location of trip generators will be used to identify potential gaps and overlaps in service and provide a base for assessing whether or not there is a demand for additional transportation services. **Need** is defined as the total number of people that will likely require transit services based on demographic characteristics (low income persons, persons with no access to a vehicle, persons with disabilities aged 18-64, and older adults).

Need = Residents of Households having No Vehicle + Persons with Disabilities

Demand is defined as the estimated number of trips these people would likely take if their mobility were not limited. Demand varies by population group (who), purpose (why), mode (how), destination (where) and time (when). Figure 3 illustrates the factors that affect demand. To quantify rural demand and need take the data collected in the previous section and follow the step-by-step instructions provided in TCRP 161's Appendix B at http://www.trb.org/Main/Blurbs/168758.aspx and complete that reports Spreadsheet Tool at http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_161.xls. This spreadsheet will give overall numbers for need and demand, but will not account for variations in demand based on time, purpose and destination. When utilizing the spreadsheet, you will need to select the type of demand you wish to estimate: program or non-program. Non-program demand is general public transportation and will require the demographic data collected in the previous section as input. Program demand refers to trips that would not be made without the existence of a particular program: for example, a vocational training program for persons with disabilities. The data required to estimate program demand include:

- Number of program participants;
- Number of days per week that the group meets;
- The number of weeks per year the program is offered;
- The proportion of program participants who attend the program on an average day; and
- The proportion of program participants that require transportation.

Non-Program Demand = (2.20 x Population age 60+) + (5.21 x Persons with Disabilities) + (1.52 x Residents of Households having No Vehicle)

The **Mobility Gap** is the difference between the number of daily trips taken by persons with access to a personal vehicle and those lacking access to a personal vehicle. The mobility gap for Illinois is 1.6; therefore, the mobility gap for your service area can be calculated by multiplying 1.6 by the number of zero-vehicle households (not the number of persons living in zero-vehicle households).

Figure 3 | **Factors That Affect Demand**

Who?

Zero-Vehicle Households
Persons with Low Income
Persons with Disabilities
Older Adults

How?

Taxi
Fixed Route Transit
Deviated Fixed Route Transit
Curb-to-Curb Transit
Door-to-Door Transit
Door-through-Door Transit

Why?

Work
Education
Medical
Recreation
Social
Shopping

DEMAND

When?

Weekday Morning Peak
Weekday Evening Peak
Weekday Off-Peak
Weekend Daytime
Weekend Evening

Where?

Major Employers
Schools
Residential Neighborhoods
Medical Facilities
Parks/ Recreation Facilities
Transportation Hubs
Shopping Centers
Grocery Stores

Source: TCRP Report 161, Methods for Forecasting Demand and Quantifying Need for Rural Passenger Transportation (2013)

Mobility Gap = 1.4 x Residents of Households with No Vehicle

The **Unmet Need** is the difference between the demand and trips currently being provided by transit or human service program transportation. Unmet needs may stem from spatial or temporal aspects of the existing transit system, or from an inadequate level of passenger assistance. A spatial gap in transit service occurs when there is demand to or from a particular location that is either unserved or underserved by transit. A temporal gap occurs when there is demand for transit at particular times that are either unserved or underserved by transit. A gap based on

an inadequate level of passenger assistance occurs when there is demand for services such as door-through-door or door-to-door that are currently unavailable. Trip denial logs from existing transit providers will be useful in determining unmet needs in transit services.

Demographic characteristics have an influence on the four major inputs for demand. Figure 4 shows the typical transportation characteristics of each transit dependent group. Zero-vehicle households may contain persons from other transit dependent groups; therefore, zero-vehicle households have the greatest possible diversity in transportation characteristics.

Figure 4 | Transportation Characteristics of Transit Dependent Groups

Zero-Vehicle Households

Why?	**Where?**
Work Education Medical Recreation Social Shopping	Major Employers Schools Residential Medical Parks and Recreation Transportation Hubs Shopping Centers Grocery Stores
How?	**When?**
Taxi Fixed Transit Deviated Fixed Transit Curb-to-Curb Transit Door-to-Door Transit Door-through-Door	Weekday Morning Peak Weekday Evening Peak Weekday Off-Peak Weekend Daytime Weekend Evening

Persons with Disabilities

Why?	**Where?**
Medical Recreation Social Shopping	Residential Medical Parks and Recreation Shopping Centers Grocery Stores
How?	**When?**
Accessible Taxi Deviated Fixed Transit Curb-to-Curb Transit Door-to-Door Transit Door-through-Door	Weekday Off-Peak Weekend Daytime Weekend Evening

Older Adults

Why?	**Where?**
Medical Recreation Social Shopping	Residential Medical Parks and Recreation Shopping Centers Grocery Stores
How?	**When?**
Taxi Deviated Fixed Transit Curb-to-Curb Transit Door-to-Door Transit Door-through-Door	Weekday Off-Peak Weekend Daytime Weekend Evening

Low Income

Why?	**Where?**
Education Employment Shopping	Residential Schools Major Employers Grocery Stores
How?	**When?**
Deviated Fixed Transit Curb-to-Curb Transit Fixed Transit	Weekday Morning Peak Weekday Evening Peak Weekend Daytime Weekend Evening

Source: TCRP Report 161, Methods for Forecasting Demand and Quantifying Need for Rural Passenger Transportation (2013)

1.2 CONSULT WITH STAKEHOLDERS/ PUBLIC INVOLVEMENT

Stakeholders can be a person, group, organization, government agency or outside public transit system, actually or potentially impacted by your potential service. Consulting with stakeholders will provide additional information and insight into selecting target group(s) and service type. Consulting and collaborating with stakeholders will also provide a greater opportunity for coordination, thereby improving both the quality of service to be provided and efficiency of the operation.

The My Trip Phase I project includes an extensive Stakeholder Contact Tool.

What is the Stakeholder Contact Tool?

The Stakeholder Contact Tool, shown on Figure 5 and available at http://ecihstp.cuuats. org/my-trip/stakeholder-contact-tool/, is a list of potential stakeholders or persons with a vested interest in your community and/or rural transportation. It classifies the stakeholders in the following groups:

- Public transit;
- Private transportation;
- Medical services;
- Seniors;
- Persons with disabilities;
- Religious community groups;
- Government agencies, staff and elected officials;
- Youth and families;
- Justice;
- Community service agencies and volunteer groups;
- Housing;
- Veterans;
- Education;
- Planning and economic development;
- Employment;
- Business and recreation;
- Multicultural; and
- Media.

Each stakeholder group contains a list of entities that are likely to be in your community that are worth contacting. The tool also describes where to look for possible information about these entities.

Stakeholder Groups (Outlined in Yellow) - These are the common fields in every community that contain mobility needs and resources. To truly focus on riders, you will want to include and represent as many stakeholder groups as possible.

Stakeholder Agencies (Outlined in Blue) - These are organizations under different Stakeholder Groups, feel free to add any additional agencies to the end of the sheets.

How to Find Stakeholders in Your County (Outlined in Red) - This is divided into two sections: Where to look for stakeholders and Possible Websites with a directory or information on local/regional agencies.

Figure 5 | Stakeholder Contact Tool

How to Find Stakeholders

Stakeholder Groups	Stakeholder Agencies	Where To Look:	How to Find Stakeholders in Your County — Possible Websites:
Public Transit	Local Public Transit Systems	Tranpro Statewide Public Provider directory website to search by county, or check phonebook, or Yahoo Local/Yellow Pages online. Make sure to include both Urban and Rural providers in the surround area.	www.utc.uic.edu/itranpro/clickmap.php
	Regional Coordinators	Tranpro Statewide Public Provider directory website to search by region for IL Human Service Transportation Plan (HSTP) Coordinators	www.utc.uic.edu/itranpro/clickmap.php
	IDOT Staff	IL Department of Transportation (IDOT) website's Division of Public and Intermodal Transportation (DPIT), right-hand side has specific programs and contacts listed	www.dot.il.gov/dpit/index.html
Private Transportation	Taxi Companies / Private Shuttles	Yahoo Local/Yellow Pages online or phonebook	www.yellowpages.com / www.local.yahoo.com
	Charter / Intercity Buses	Use Greyhound, phonebook or Yahoo Local/Yellow Pages online	www.greyhound.com
	Rail Systems	Use Amtrak website	www.amtrak.com
	Regional & National Airports	Yahoo Local/Yellow Pages online or phonebook	www.local.yahoo.com
Medical Services	Medicaid Transit Providers	The state broker for Illinois is First Transit. For approval go to their website or call 866-503-9040 or TTY 800-526-0844 - 8 a.m. to 5 p.m. M - F.	www.netspap.com
	County & City Health Departments	County Health Department or IL Department of Human Services websites	www.dhs.state.il.us/page.aspx?module=12
	Emergency Medical Transportation Providers	Note all public providers are automatically ADA certified. If looking for a specific medical van contact Department of Motor Vehicle (DMV) registration offices to see ADA certified providers.	www.cyberdriveillinois.com/
	Air Medical Service Providers	If looking for specific provider of a rural area go to Association of Air Medical Services (AAMS) or Atlas & Database of Medical Services (ADAMS) websites.	www.aams.org/AAMS/About_AAMS/Online_Member_Directories/ www.adamsairmed.org/public_site.html
	Doctors Offices & Clinics / Dental Offices	Check with County Health Department representatives as they are familiar with common locations, or check phonebook and Yahoo Local/Yellow Pages online.	www.yellowpages.com www.local.yahoo.com
	Area Hospitals	American Hospital Directory local listings website	www.ahd.com
	Mental Health & Counseling Offices / Rehabilitation Centers	County Health Department or IL Department of Human Services websites	www.dhs.state.il.us/page.aspx?module=12
	Psychiatric Hospitals	IL Department of Human Services office locator website	www.dhs.state.il.us/page.aspx?module=12
	Substance Abuse Treatment Centers	Substance Abuse Treatment Facility Locator website, search by address	http://findtreatment.samhsa.gov/TreatmentLocator/faces/quickSearch.jspx
Seniors	American Red Cross	Call County Health Department or check their service directory website, and/or check phonebook and Yahoo Local/Yellow Pages online	www.redcross.org/where
	Adult Day Services Centers		
	Nutrition Programs (Meals on Wheels)		
	Area Agencies on Aging Offices & Programs	Search by county on IL Department on Aging website or call: 800-447-4278 or TTY 888-206-1327	www.state.il.us/aging/1directory/directory-main.htm www.state.il.us/aging/2aaa/aaa_map.htm
	In-Home Service Offices & Programs		

Why Contact These Groups?

Each stakeholder group has a unique set of interests and variety of perspective and insight into providing rural transportation. The insight they provide may be from the perspective of the rider, the provider or even the trip purpose. Some stakeholders provide information on the rules, regulations and legislative framework for working with certain population cohorts. Table 3 shows the various insights that each stakeholder group can provide. These groups can provide insight into possible service contract revenue sources. Service contracts are discussed in the funding chapter.

How to Use the Stakeholder Contact Tool?

The information you have collected in your previous research chapter will provide important information regarding the demographic makeup of your county. Once you have identified the share of each transit dependent group in your community, you can use Table 3 to prioritize and select which stakeholder groups you would benefit most from contacting. You can then use the Stakeholder Tool from My Trip Phase I to contact the entities within your selected stakeholder groups.

You can obtain information from and work with your stakeholders in a number of ways, some of which include:

- Interviews;
- Focus groups;
- Surveys and questionnaires;
- Working groups;
- Advisory groups;
- Steering committees; and
- Formal committees.

Table 3 Stakeholder Group Perspective and Insight

Stakeholder Group	Target Groups, Insight and Perspective
Public Transit	Provide perspective and insight into challenges facing transit in your community. Service challenges may be related to certain neighborhoods or community, certain population groups and even trip types.
Private Transportation	Private providers usually meet transportation needs when transit is either unavailable or impractical. Utilizing these providers can be cost-prohibitive for some groups. Data on the use of these providers can offer insight into the needs of affordable transportation options.
Medical Services	Medical trips usually provide a unique set of challenges, and persons needing medical transportation are usually older adults and persons with disabilities.
Seniors	Seniors
Persons with Disabilities	Persons with disabilities
Religious Community Groups	Religious groups typically work with vulnerable groups in the community: most frequently youth, older adults, persons with disabilities and persons with low income. These religious groups can provide insight into the needs of the groups and can also provide special programs geared towards these groups. This may necessitate special program transportation.
Government Agencies, Staff and Elected Officials	This group of people is usually familiar with many issues in a community and can provide insight into a community's support for certain projects.
Youth and Families	Youth
Justice	Agencies in this group typically work with vulnerable groups that are sometimes difficult to provide program transportation for, such as ex-convicts, domestic violence survivors, parolees, low income persons, etc.
Community Service Agencies and Volunteer Groups	Community Service and Volunteer groups typically work with vulnerable groups, such as low income persons, persons with disabilities, older adults, and youth, all of whom are classified as transit-dependent.
Housing	Housing agencies typically work with low income persons.
Veterans	The share of veterans with severe disabilities has been steadily increasing since 2000, and a significant number of veterans are older adults.
Education	Education providers usually serve the youth population and typically require some type of program transportation.
Planning and Economic Development	Planning and economic development departments can provide data, plans, assistance and resources needed to properly plan and implement your transportation service.
Employment	Employment stakeholders typically work with low income persons.
Business and Recreation	Business and recreation stakeholders usually represent major trip generators in the community.
Multicultural	Immigrants face transportation challenges that mainly pertain to language barriers and unfamiliarity with transportation in the United States.
Media	Local media can provide assistance with getting the word out about your potential new service.

1.3 SERVICE TYPE, PASSENGER ASSISTANCE AND LEVEL OF SERVICE

SERVICE TYPE AND PASSENGER ASSISTANCE

After researching the transportation needs of specific population cohorts, mapping the distribution of transit dependent groups and the location of trip generators, and consulting with stakeholders in your community, you can now make informed decisions regarding your proposed service type, level of passenger assistance, and level of service.

Service type pertains to the type of route you feel would be best suited to meeting the demands of your community. Service or route types in rural transportation are typically classified in one of three ways: demand response, fixed route, and deviated fixed route. Passenger assistance is usually associated with demand response or deviated fixed transportation systems and usually defines the level of assistance that drivers will provide to passengers. This assistance can be with boarding and alighting or to and through the door of the destination.

Demand Response

Demand response transportation is a shared use transit service operating in response to calls from passengers or their agents to the transit operator, who schedules a vehicle to pick up the passengers and transport them to their destinations. There are no defined routes, and there are no limitations on origins and destinations as long as the trip is within a defined service area. Conditions most suited to demand response transportation are:

- Low-density communities with dispersed trip generators; and
- Service and quality of life trips such as shopping, medical and personal.

There are also varying levels of service for demand response transportation. These levels of service pertain to level of assistance provided to passengers. The types of level of service are:

- **Curb-to-Curb:** Passengers are picked up and dropped off at the curb.
- **Door-to-Door:** The driver or passenger escort picks up or drops off riders at the entryway of the address provided. Persons with mild to moderate physical or mental disabilities typically require this level of service.
- **Door-through-Door:** The driver or passenger escort assists riders through the door or destination. Assistance can include opening doors and providing verbal guidance and physical support. Persons with severe physical or mental disabilities typically require this level of service.

Fixed Route Transit

According to the National Transit Database, fixed route transit operates on a repetitive fixed schedule based along a specific route with vehicles stopping to pick up and drop off passengers at specific locations; therefore, times and destinations are limited. Typically, passengers access fixed route transit by waiting

at a designated stop location. Fixed Route Transit is best suited for short to medium distance trips along busy corridors. Conditions most suited to provide fixed route transit include:

- High population and employment density: typically 10-25 jobs and residents per acre can support 30-60 minute service frequency.
- Major trip types are employment and education.
- High concentration of transit-dependent populations.
- Street and sidewalk network that can support the movement of transit vehicles and pedestrians walking to designated bus stops.

Most of these characteristics are not typically found in rural areas; thus, fixed route transit is not typically suited for rural areas.

Deviated Fixed Route

A deviated fixed route is a hybrid between a fixed route service and a demand response service. Service operates along a fixed route and keeps to a specified timetable, but the vehicle can deviate from the route to go to a specific location such as a house, employment site, etc. to pick up or drop off passengers. Usually the radius of deviation from the route is specified. Deviated fixed routes are best suited for the following conditions:

- High demand for regular transportation between two major hubs for trip generators. For example demand for daily employment or education trips between an urbanized area and a suburban or rural community.
- When most trip generators are not located along major roads but instead spread out across multiple smaller streets adjacent to the main roads.

LEVEL OF SERVICE

Level of Service (LOS) in terms of public transportation refers to a set of quality of service measurements that give the operator an idea of the level of comfort and convenience of their service. Level of service measurements vary for fixed route transit and demand response transportation. For fixed route transit, level of service is typically measured on an alphabet scale from A-F, with A being most convenient and F being least convenient. Demand response transit in measured on a numerical scale from 1-8, with 1 being most convenient and 8 being the least convenient.

Fixed Route Transit

Headway or frequency for fixed route transit can either be determined by policy, demand or budgetary constraints. For example, a transit operator, county or other government entity may adopt a policy that states that headways must be 30 minutes or less; this means that the number of vehicles required is determined by the cycle time[1] of the route. On the other hand, headway can be calculated based on demand and other factors using the formula below. You can vary headway for peak and off-peak periods.

Headway may also be determined by budgetary constraints, as is usually the case in rural transportation. For new rural

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[1]Cycle time refers to the time taken for a vehicle to make a complete round trip of a route and includes the wait time at transit hubs or terminals.

transit services, the Illinois Department of Transportation (IDOT) may allocate a few vehicles to your service. Once your service is established and demand increases, you can justify applying for additional vehicles in subsequent grant application cycles. Table 4 describes various levels of service and their associated headways and estimated vehicle requirements.

Determining service hours per day is usually solely based on demand. You will analyze temporal variances in demand and set a threshold level of demand to determine your service hours each day. Table 5 illustrates various levels of service as it pertains to service hours. In rural communities, fixed route or deviated fixed route service may not be available every day of the week. In this case, you may utilize the level of service chart for demand response transit provided in Table 9.

On-time performance is an indicator of reliability and is important to riders. The better the level of service in terms of on-time performance the more likely it is for ridership to increase. A vehicle is considered on time if it arrives between 0-5 minutes after the scheduled time. Most transit operators aim for an on-time performance percentage greater than 90%. Table 6 shows various levels of service related to on-time performance.

Demand Response Transit

Level of service for demand response transportation is evaluated using different criteria, based on their response time (time between scheduling the ride and actual pick-up), service hours and days, on-time performance, and trip denial rate. Demand and capacity are two factors that have the greatest impact on response time level of service and trip denial[1] rates. Due to limited

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[1]IDOT defines a trip denial as any trip that cannot be accommodated within one hour of the originally requested trip time.

$$\text{Headway} = \frac{\text{Number of Seats on Vehicle X Load Factor}^a \text{ X } 60}{\text{Peak Point Demand}^b}$$

[a]Load Factor refers to the ratio of seated vs standing passengers that the transit operator has set as a threshold for adding additional headway. For example a load factor of 1.00 means that all seats are occupied, a load factor of 1.25 means that all seats are occupied and 25% of the passengers are standing.
[b]Peak point demand refers to the number of people in vehicles at the routes peak load point, in the peak load direction and the peak time.

Source: TCRP Webdoc 6-E, Transit Capacity and Quality of Service Manual – Part 5

Table 4 | **Headway Level of Service for Fixed Route Transit**

LOS	Avg Headway (min)	Vehicle/hour	Comments
A	<10	>6	Passengers do not need schedules
B	10-14	5-6	Passengers consult schedules
C	15-20	3-4	Maximum desirable time to wait if bus is missed
D	21-30	2	Service unattractive to choice riders
E	31-60	1	Service available during the hour
F	>60	<1	Service unattractive to all riders

Source: TCRP Webdoc 6-E, Transit Capacity and Quality of Service Manual – Part 5

Table 5 | Service Hours Per Day Level of Service for Fixed Route Transit

LOS	Hours of Service/day	Comments
A	19-24	Night or owl service provided
B	17-18	Late evening service provided
C	14-16	Early evening service provided
D	12-13	Daytime service provided
E	4-11	Peak hour service only or limited midday service
F	0-3	Very limited or no service

Source: TCRP Report 100, 2nd Edition, Transit Capacity and Quality of Service Manual, 2003

Table 6 | On-Time Performance Level of Service for Fixed Route Transit

LOS	On-Time Percentage	Comments
A	95.0-100.0	1 late transit vehicle every 2 weeks (no transfer)
B	90.0-94.9	1 late transit vehicle every week (no transfer)
C	85.0-89.9	3 late transit vehicles every 2 weeks (no transfer)
D	80.0-84.9	2 late transit vehicles every week (no transfer)
E	75.0-79.9	1 late transit vehicle every day (with a transfer)
F	<75.0	1 late transit vehicle at least daily (with a transfer)

Source: TCRP Report 100, 2nd Edition, Transit Capacity and Quality of Service Manual, 2003

funding, few vehicles are allocated to rural transit. When demand outpaces capacity, schedules fill up quickly and more advance scheduling time is required, reducing level of service. This situation also leads to more frequent trip denials. Service area also has an influence on response time, because large service areas with single location for housing vehicles means that it could take longer for vehicles to travel from the vehicle storage location to the furthest point in the service area. In this situation, some operators may divide the service area into smaller zones with satellite sites for storing vehicles; this may reduce response time and improve level of service. Tables 7 and 8 describe the levels of service for demand response transit related to

response time and trip denial rate.

Like fixed route transit, service hours and service days for demand response transit are determined by analyzing travel times and temporal variations in demand. Demand response transportation, outside of ADA paratransit services, typically operate in rural communities with limited population, demand and resources. Service is usually not provided every day of the week. Table 9 illustrates the level of service matrix for demand response transportation that takes into account both days of the week and hours per day of service. Although levels of service of 7 and 8 are

typically provided in areas with limited funding and population, it is usually not attractive to the rider.

For demand response transit, a pick-up is considered on time if it occurs within a window of the scheduled time. The on-time pickup window is usually determined by the operator and for rural transit usually occurs from 15-30 minutes after the scheduled pick-up time. Table 10 shows the various levels of service for on time performance for demand response transit.

Table 7	Response Time Level of Service for Demand Response Transit (DRT)

LOS	Response Time	Comments
1	Up to ½ hour	Very prompt, similar to taxi service
2	Between ½ hour and 2 hours	Prompt, considered immediate response for DRT
3	More than 2 hours but still same day	Requires planning but one can still travel on the day the trip is requested
4	24 hours in advance; next day service	Requires some advance planning
5	48 hours in advance	Requires more advance planning than next-day service
6	Between 48 hours and 1 week	Requires advance planning
7	Between 1 week and 2 weeks	Requires considerable advance planning, but may still work for important trips needed soon
8	More than 2 weeks	Requires significant advance planning or service is not available

Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

Table 8   **Trip Denial Level of Service for Demand Response Transit**

LOS	Trip Denial Percentage	Comments
1	0-1	No trips denied/month
2	>1-2	1 trip denied/month
3	>2-4	1-2 trips denied/month
4	>4-6	2 trips denied/month
5	>6-8	3 trips denied/month
6	>8-10	4 trips denied/month
7	>10-12	5 trips denied/month
8	>12	More than 5 trips denied/month

Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

Table 9   **Service Hours and Days Level of Service for Demand Response Transit**

Hours/Day	Days/Week						
	6-7	5	3-4	2	1	0.5*	<0.5
>16.0	LOS 1	LOS 2	LOS 4	LOS 5	LOS 6	LOS 7	LOS 8
12.0-15.9	LOS 2	LOS 3	LOS 4	LOS 5	LOS 6	LOS 7	LOS 8
9.0-11.9	LOS 3	LOS 4	LOS 4	LOS 6	LOS 6	LOS 7	LOS 8
4.0-8.9	LOS 5	LOS 5	LOS 5	LOS 6	LOS 7	LOS 7	LOS 8
<4.0	LOS 6	LOS 6	LOS 6	LOS 7	LOS 8	LOS 8	LOS 8

Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

Table 10   **On-Time Performance Level of Service for Demand Response Transit**

LOS	On-Time Percentage	Comments
1	97.5-100	1 late trip/month
2	95.0-97.4	2 late trips/month
3	90.0-94.9	2-4 late trips/month
4	85.0-89.9	5-6 late trips /month
5	80.0-84.9	7-8 late trips/month
6	75.0-79.9	9-10 late trips/month
7	70.0-74.9	11-12 late trips/month
8	<70.0	More than 12 late trips/month

Source: Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

1.4 FORM NONPROFIT

Based on your research, if you have determined that there is a need for additional transportation services in your community/region, you will need to follow Illinois State laws and Federal laws for forming your nonprofit. "Nolo" provides legal advice and guides for forming a nonprofit in the state of Illinois. These guides are available online at http://www.nolo.com/legal-encyclopedia/nonprofits or in published hard copy form.

1.5 FUNDING SOURCES

There is a wide variety of funding sources available to nonprofits for the provision or improvement of transportation services and access. Grants may be available through a variety of government agencies at various levels (Federal, State, County, etc.). The major government body that funds transportation is the United States Department of Transportation (USDOT). The USDOT has several administrative bodies through which it administers grants for transportation; this guide will focus on grants available through the Federal Transit Administration (FTA).

The FTA has two major subcategories of grants: formula grants and discretionary grants. Formula grants are allocated to recipients based on a predetermined formula, which usually considers factors such as population, land area, number of elderly persons, number of persons with disabilities, and number of low income persons, among other things. Discretionary grants award funds on the basis of a competitive process. For discretionary grants, the FTA publishes a set of selection criteria along with legislative and regulatory requirements. After grants are submitted, the FTA reviews the applications to identify which applicants best fulfills the requirements of the grant.

Applicable FTA grants will vary depending on the type of service you decide to provide, the location you decide to serve and the target groups you decide to serve. Grants will also specify what type of expenses the funding source may be utilized for, e.g., capital or operating expenses. The nonprofit FTA grant guide will discuss in sufficient detail the

requirements of grants available to nonprofits for the provision, expansion or improvement of transportation services.

FTA NONPROFIT GRANT GUIDE

MAP-21 (Moving Ahead for Progress in the 21st Century) was signed into law on July 6, 2012, becoming the current federal legislation that funds surface transportation. MAP-21 policies took effect on October 1, 2012 and replaced the previous legislation, SAFETEA-LU (the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users). MAP-21's formula grants available to nonprofit organizations are listed below:

- Section 5311 (Rural Public Transportation); and
- Section 5310 (Transportation for Elderly Persons and Persons with Disabilities).

Nonprofit organizations are not eligible recipients of the grants listed above; however, they are eligible subrecipients. This type of arrangement means that FTA directly awards grant funds to eligible recipients, usually the State; then the state passes those funds onto subrecipients, which include but are not limited to local government authorities, nonprofit organizations and operators of public transportation.

SECTION 5311 (RURAL PUBLIC TRANSPORTATION)

Program Overview

Funds are provided for the purpose of supporting public transportation in rural areas with populations of less than 50,000. The goal of the program is to provide the following services:

- Enhance the access of people in non-urbanized areas to health care, shopping, education, employment, public services, and recreation.

- Assist in the maintenance, development, improvement, and use of public transportation systems in non-urbanized areas.

- Encourage and facilitate the most efficient use of all transportation funds used to provide passenger transportation in non-urbanized areas through the coordination of programs and services.

- Assist in the development and support of intercity bus transportation.

- Provide for the participation of private transportation providers in non-urbanized transportation.

Eligible Recipients

Eligible recipients include a State or Indian tribe that receives a federal transit program grant directly from the federal government. Eligible subrecipients include State or local governmental authority, nonprofit organizations, and operators of public transportation or intercity bus service that receive federal transit grant funds indirectly through a recipient.

In order for applicants to be deemed eligible for Section 5311 funding, applicants must be compliant with a number of IDOT requirements. These include:

- Title VI;
- Equal Employment Opportunity Act;
- Section 504 of the Rehabilitation Act of 1973;
- Americans with Disabilities Act;
- Bus testing requirement;
- Restrictions on lobbying;
- Disadvantaged Business Enterprise Program;
- Protections for transit workers under Section 5333(b);
- Charter rule;
- School bus;
- Environmental protection;
- Drug and alcohol testing; and
- FTA's Safety and Jurisdiction.

As part of the eligibility process for Section 5311, the IDOT has stipulated that counties must undergo the Interagency Coordinating Committee on Transportation (ICCT) primer process (http://tranpro.utc.uic.edu/funding/TechAssistICCT.php). Counties are required to notify IDOT of their interest in pursuing Section 5311 funds for their county, and then must complete the primer process. Once the primer process is complete and the county becomes eligible, the county may pass funds to a designated nonprofit organization. This nonprofit organization is most likely the operator, i.e. the entity directly providing transportation. It is recommended that this nonprofit organization participates in the primer process.

The ICCT primer process provides counties with technical assistance for developing coordinated transportation systems and involves the following five steps:

Phase I: Transit Partnership Group

The first step is to form a group of individuals with a vested interest in transportation or one or more of the transportation disadvantaged groups: persons with disabilities, persons with low income, older adults, and youth. Your Transit Partnership Group should include a wide range of stakeholders, such as human service transportation providers, public transportation providers, public transportation users, community leaders, employers, health care providers, local government officials, etc.

Phase II: Needs and Resources

This phase is similar to the Research and Inventory of Existing Services chapter in this guide. It requires consulting stakeholders and conducting research to ascertain the existing level of transportation service available in your county. You will also need to determine who needs transportation, where they want to go and when they want to travel. The differences between the available transportation and the identified needs are classified as unmet needs

or gaps. A surplus of transportation resources and/or providers is referred to as an overlap in service.

Phase 3: System Model and Action Plan

The third step requires you to develop a coordinated system model based on the available resources. You will collaborate with the partners and stakeholders you identified in the previous phase to design a coordinated system with each partner and stakeholder committing a comfortable level of support to the system. This group will decide on service parameters like the level of service, service hours and service area.

Phase 4: Secure Funding

In this phase, the County will need to send a letter of intent to the IDOT describing your county's plan to provide rural public transportation. You will also need to request the Section 5311 grant manual and participate in your local HSTP committee. You can complete the Section 5311 and Downstate Operating Assistance Program (DOAP) application for funding, which is described in a later subsection of this chapter.

Phase 5: Evaluation

In this final phase, you will need to devise a plan to monitor and evaluate the performance and progress of your transit service. You will need to reassess the ability of the services provided to meet the ever changing demand for transportation.

Eligible Projects and Activities

Eligible expenses and services that may be funded under Section 5311 include:

- Any transportation service delivered by bus, shared ride taxi and public or private owned service that provides general public transportation on a regular basis to and from rural areas.

- Eligible trips must have their origin, destination or both within a classified rural area. Therefore, trips that begin and end in an urbanized area are not eligible.

- The project or service may be to establish a new public transit system, or expand or alter a current public transit service to provide rural general public transportation.

- Where possible, urbanized and non-urbanized services should be coordinated when possible, allowing passengers to make meaningful connections and transfers to urbanized fixed routes.

- Job Access and Reverse Commute (JARC) activities are now eligible under Section 5311. JARC projects are transportation services that are designed to transport welfare recipients and eligible low income persons to and from employment, education and training.

Eligible Expenses

Section 5311 will not fund 100% of the cost associated with providing rural public transportation services. It instead funds a predetermined percentage of expenses (100% planning, 50% operating, 80-90% capital and 80% administrative). The difference required to fund projects is referred to as local match.

Eligible sources of local match funding include some combination of state, local or private funding that must be identified and committed. The applicant must certify that matching funds are available at the time of application. Allowable sources of local match funds include dedicated local tax revenues, private donations, revenue from service contracts, toll revenue credits, and program income generated from advertising and concessions. Fares are not eligible for local match; they are considered project income and must be deducted from eligible expenses. Once project income is deducted from eligible expenses, the remaining deficit is funded by Section 5311 at the aforementioned percentages.

Planning

It is recommended that nonprofits consult with the Illinois Department of Transportation before utilizing Section 5311 funds for planning expenses. Examples of eligible planning activities under Section 5311 include:

- Feasibility studies;

- Evaluating previously financed projects;

- Peer reviews and exchanges of technical data; and

- Information assistance and related activities in support of planning and environmental analyses among MPOs and other transportation planners.

Capital

Federal 5311 Funding will fund up to 80% of capital expenses and up to 83% for vehicle-related purchases to be in compliance with

ADA. Section 5311 will also fund up to 90% for capital projects used to provide access for bicycles to transit facilities or to install racks or other equipment for transporting bicycles on transit vehicles, and for vehicle-related equipment or facilities, including clean fuel or alternative fuel. Eligible capital expenses include the procurement, construction and improvement of transit facilities and equipment needed for safe, efficient and coordinated public transportation. Examples of eligible capital expenses include:

- Buses, vans, paratransit vehicles;
- Radios and communication equipment;
- Passenger shelters;
- Wheelchair lifts and restraints;
- Preventative maintenance;
- Computer hardware and software;
- Spare parts with a unit cost of over $300 and a useful life of over one year;
- Vehicle rehabilitation;
- Initial installation costs; and
- Construction or rehabilitation of transit facilities (including design, engineering and land acquisition).

Administrative

Section 5311 will fund 80% of administrative costs. Administrative expenses are non-operating expenses. Eligible administrative costs may include but are not limited to general administrative and overhead costs:

- Salaries of the project director and bookkeeper;
- Office supplies;
- Facilities and equipment rental;
- Insurance; and
- Marketing.

Operating

Section 5311 will fund up to 50% of operating expenses. Operating expenses are costs directly related to system operations. Net operating expenses are those expenses remaining after operating revenues (fares[1]) are subtracted from eligible operating expenses. Examples of operating expenses include:

- Fuel and oil;
- Driver salaries and fringe benefits;
- Dispatcher salaries and fringe benefits;
- Licenses;
- Extended warranties;
- Maintenance and repairs;
- Marketing expenses;
- Office supplies;
- Facilities and Equipment rental; and
- Administration of drug and alcohol testing.

  Downstate Operating Assistance Program (DOAP)

  The Illinois Department of Transportation (IDOT) provides funding to local governments in downstate Illinois[2] to assist with operating expenses pertaining to the provision of public transportation. This funding source may be utilized as local match for the Section 5311 grant; however, DOAP will only fund 65% of operating deficit after Section 5311 has been utilized. For example, if MTDA has a net operating expense of $25,000, Section 5311 will fund 50% of that, which is $12,500. The remaining $12,500 will need to be funded by

[1]*Fares that are classified as revenue include fares paid by riders who are later reimbursed by human service agencies, or other user side subsidy arrangements. Revenues do not include payments made directly to the transit provider by human service agencies, this revenue may be used as local match.*

[2]*Counties in Illinois outside of the Chicago Metropolitan Area.*

local match. DOAP can be utilized to fund 65% of the remaining $12,500 of unfunded expenses; therefore, DOAP will fund $8,125. The remaining $4,375 will need to be funded by other local match sources.

In order to receive DOAP funds, it is recommended that eligible recipients conduct public outreach to gain input regarding unmet needs and recommended service parameters. This will help generate local support, which is an important evaluation criteria for IDOT funding approval. Eligible recipients of DOAP include urban transit systems, rural transit districts, individual counties, cities, villages, and incorporated towns. Although nonprofits are not listed as direct eligible recipients, nonprofits may request counties or other eligible government entities to apply for DOAP funding and designate the nonprofit as the operator. This arrangement is usually done via an intergovernmental agreement between the County or designated recipient and the nonprofit (operator).

To receive funding, an appropriation must be secured and approved by the General Assembly in the next year's budget. After the appropriation has been approved, an application must be submitted to IDOT for approval based on the following criteria:

- Planning to provide general public transportation with an emphasis on serving older adults, persons with disabilities and persons with low income.
- Implementing interagency coordination that encourages participation of all state and federally funded agencies that have transportation interests in the proposed service area.

- Holding public hearings for comment on the proposed service plan.

Service Contracts

One eligible local match source mentioned above is service contracts. Service contracts are an agreement between the operator and an outside agency or entity to provide transportation services for that outside agency's clients. When the operator provides this service for the outside agency, they must allow general public passengers to ride with the agency's clients if they so choose. If rides are provided exclusively to the agency's clients, that type of service is classified as charter service. Charter services are usually not allowed under Section 5311.

Service contracts may be priced at a predetermined lump sum amount, or may be billed per trip, per mile, or per hour. When billing is based on per-trip basis, it cannot be classified as local match, but must be classified as farebox revenue or project income. If billed as a lump sum or per-mile or per-hour, the revenue can be classified as local match. Local match versus farebox revenue determination also depends on the type of agency. If the agency is for profit, it must be classified as farebox regardless of the billing arrangement.

Section 5311 Application

As of FY 2015, the Illinois Department of Transportation (IDOT) will accept combined applications for Federal Section 5311 funding and Downstate Operating Assistance Program (DOAP) funding. This application needs to be submitted on an annual basis with new supporting documents signed and approved for each new fiscal year.

The application requires specific pieces of information and supporting documents. Some of these include:

- Type of route (fixed route, demand response or deviated fixed) and level of

- service (curb-to-curb, door-to-door or door-through-door).

- Description of the service area (square miles and population), preferably illustrated by a map.

- List of all operators and an estimate of the number of trips, service miles and hours to be provided in the upcoming year.

- Hours of service.

- Number of vehicles.

- A description of your attempt to coordinate on a local or regional scale with stakeholders and other transportation providers which include human service providers, public transportation providers and private taxi operators. This is best done through your local or regional HSTP committee.

- Certification of operating entity, whether non-profit, private for-profit, municipal corporation etc.

- Description of planned monitoring methods to ensure compliance with IDOT and FTA regulations.

- Description of your efforts to involve private sector operators in the provision of rural public transportation in your proposed service area.

- Evidence of conducting a public hearing giving the general public an opportunity to comment on the proposed service. A copy of the public notice and certification, along with minutes from the meeting, are required as supporting documents.

- Description of planning efforts in the last five years and how the public was involved.

- Annual budget.

- Proposed employee utilization and full time equivalents.

- Outline of proposed local match fund sources.

- Proposed fare structure.

- Organization chart for each operator.

- Copy of most recent audit of the operator.

- Board resolution.

- Ordinance approving provision of rural public transportation.

- Opinion of Counsel.

- Inventory of vehicles and other capital (radios, telephones, computers, office equipment etc.)

- Signed list of certifications and assurances.

These documents will require a variety of signatures from a designated representative for the grantee, designated representative for the operator, board representative, Program Compliance and Oversight Monitor (PCOM) and an Attorney.

The Program Compliance and Oversight Monitor (PCOM) is a staff member designated by the grantee to complete and oversee tasks related to the compliance with the Section 5311 and DOAP grant programs as outlined by the IDOT. Examples of PCOM responsibilities include:

- Ensure that the operator is compliant with the FTA and IDOT regulations.
- Inspect vehicles at least twice a year to ensure that proper equipment is present and in good working order.
- Ensure that the service is being effectively marketed as general public transportation.
- Inspect vehicle maintenance records to ensure that vehicles are being maintained according to manufacturer's recommendations.
- Complete the following quarterly and annual reports:
    - » Compile service data detailing service hours, service miles, fare revenue and local match revenue collected, total trips, trip types, etc.
    - » Review and sign off on quarterly requisitions for payment provided by the operator.
    - » Summarize coordination efforts and efforts to obtain local match revenue.
    - » Analyze rider complaints and outline strategies to address complaints.
    - » Complete the annual Public

Transportation Plan.

The blank combined application template for FY15 provides a checklist of documentation required for both grant applications. A sample approved grant application for Champaign County can be found at http://ecihstp.cuuats. org/2-champaign-county-65-grant-app-fy16/.

More detailed Section 5311 information can be found here in the 5311 Circular available at http://ecihstp.cuuats.org/fta_ circular_9040_1g_with_index_-_final-posted- online/.

Although Section 5311 funds can be utilized for capital expenses, usually Section 5311 and DOAP are best utilized for operating, administrative and planning expenses. Application for funding for capital expenses is best done through the Consolidated Vehicle Procurement (CVP) program or the Downstate Transit Improvement Fund (DTIF).

The CVP application is for vehicles only and requires the following:

- Latest 5310 IDOT/DPIT application available;
- Signed application by Board authorized representative (front cover, page 1);
- FTA & IDOT Joint Certifications Assurances signed by Official Representative and Affirmation of Applicant's Attorney;
- Public hearing, which must have a published notice, hearing report and public comments;
- Opinion of Counsel (Sample Language), which must be completed by all applicants;
- Executed Board Resolution authorizing applicant's Official Representative;
- Letter from MPO placing project in TIP (not applicable in Cook, Lake, DuPage, Kane, Will and McHenry

Counties, or any non-urbanized area);

- Letter of support from Certified Public Provider or local Transit Authority; and

- Copy of your State of Illinois ID Tax exempt Letter.

The CVP application and instructions can be found at http://ecihstp.cuuats.org/grants/ with the application checklist. A sample approved grant application for CCAR Industries can be found at http://ecihstp.cuuats.org/3-sample-cvp-app-completed/.

The DTIF application is typically used for capital expenses other than vehicles. Eligible capital expenses include but are not limited to radios, computers, office equipment, software, etc. The DTIF application requires the following items:

- Project description;

- Project justification;

- Use of green technology (if applicable);

- Proposed budget;

- Implementation schedule (if applicable);

- Public hearing notice;

- Opinion of counsel; and

- Board resolution.

SECTION 5310 (ENHANCED MOBILITY FOR OLDER ADULTS AND PERSONS WITH DISABILITIES)

Program Overview

MAP 21 (Moving Ahead for Progress in the 21st Century) was signed into law on July 6, 2012 and replaced SAFETEA-LU (the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users) as the federal legislation that funds surface transportation. Under SAFETEA-LU, there were three FTA human service transportation grant programs:

(a) Section 5310: Enhanced Mobility for Older Adults and Persons with Disabilities, (b) Section 5316: Job Access and Reverse Commute, and (C) Section 5317: New Freedom. These grant programs were consolidated and restructured under MAP 21. Section 5317 was dissolved as a standalone grant and consolidated with Section 5310. Section 5316 was also dissolved as standalone grant and consolidated with Section 5307: Urbanized Area Formula Grants.

Section 5310 is the only remaining human service transportation program. Its main objective is to improve access to affordable transportation for older adults and persons with disabilities. This grant provides funding for programs beyond traditional public transportation and ADA paratrasit service. These funds may be utilized in urbanized areas with population less than 200,000 or rural areas.

Eligible Recipients

Nonprofits are not the only organization eligible for Section 5310 funding; other eligible entities include state or local government agencies and operators of public transportation services. When a nonprofit organization is interested in applying for Section 5310 funding, it must actively participate in their local rural/ countywide Human Service Transportation Plan (HSTP) committee meetings. The HSTP committee is responsible for nominating/recommending organizations most suited and eligible to apply for Section 5310 funding. All areas in Illinois, both urban and rural, have a assigned HSTP coordinator, so contact your local MPO or IDOT for information on how to participate in your local HSTP process or access the plan.

Like Section 5311, eligible recipients must also be compliant with the following federal regulations:

- Title VI;
- Equal Employment Opportunity Act;
- Section 504 of the Rehabilitation Act of 1973;
- Americans with Disabilities Act;
- Bus testing requirement;
- Restrictions on lobbying;
- Disadvantaged Business Enterprise Program;
- Protections for transit workers under Section 5333(b);
- Charter rule;
- School bus;
- Environmental protection;
- Drug and alcohol testing; and
- FTA's Safety and Jurisdiction.

Eligible Projects and Activities

Projects eligible for funding under Section 5310 must be selected from a locally developed coordinated Human Services Transportation Plan. Since Section 5310 and Section 5317 were consolidated under the new Section 5310 program, projects were classified as traditional or nontraditional. Traditional projects are projects that were eligible before consolidation, such as transportation capital projects planned, designed and carried out to meet the specific needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable or inappropriate. Nontraditional projects are those that support activities that enhance paratransit services beyond ADA requirements and improve accessibility to fixed route transit, and public transportation alternatives that assist older adults and persons with disabilities. However, IDOT as the designated recipient in the state of Illinois has restricted Section 5310 funding for the purchase of rolling stock.

IDOT will approve Section 5310 funding for the purchase of rolling stock for certain projects including:

- Expanding the paratransit radius beyond three fourths of a mile as required by ADA.
- Providing same-day paratransit service.
- Providing accessible feeder service to commuter rail or bus facilities for which paratransit service is not required.

Examples of nontraditional eligible activities at the federal level that are not supported by IDOT include:

- Travel training programs which focus on educating persons with disabilities and older adults about available transportation options. Travel trainings should also provide real first-hand training of utilizing various transportation services.
- Expanding paratransit service hours beyond those provided for fixed route service.
- Increasing the level of service beyond curb-to-curb to either door-to-door or door-through-door.
- Supporting volunteer driver aid programs. This can include covering expenses associated with administration, management, recruitment, safety, background checks, coordination, etc.
- Supporting the administration and expenses related to voucher programs for transportation services offered by human service providers.
- Purchasing paratransit vehicles and supporting accessible taxi, ridesharing and vanpool programs for persons with disabilities and older adults.
- Making accessibility improvements, such as paths, sidewalks, signage and other accessible features to transit and intermodal stations.

Eligible Expenses

Section 5310 guidelines state that no less than 55% of funds must be utilized for traditional capital activities. The remaining percentage may be utilized for nontraditional activities. Like Section 5311 funding, Section 5310 will not fund 100% of the cost associated with providing transportation for older adults or persons with disabilities. Section 5310 will fund a predetermined percentage of eligible administrative, capital and operating expenses. The difference required to fund projects is referred to as local match. Eligible sources of local match funding include some combination of identified and committed state, local or private funding. The applicant must certify that matching funds are available at the time of application. Allowable sources of local match funds include dedicated local tax revenues, private donations, revenue from service contracts, toll revenue credits and program income generated from advertising and concessions.

Administrative Expenses

At the federal level, Section 5310 will fund 100% of administrative expenses directly associated with providing transportation. This means local match is not required for administrative costs. However, administrative costs cannot exceed 10% of the overall budget. Eligible administrative expenses include but are not limited to general administrative and overhead costs, staff salaries, office supplies and development of specifications for vehicles and equipment. Technical assistance and planning activities, including allocations to subrecipients to support local coordination efforts, are also eligible administrative expenses. General overhead costs must be supported by an FTA-approved indirect cost rate proposal. However, the IDOT will not fund administrative expenses at this time.

Capital Expenses

The local match requirement for capital expenses is 20%; federal Section 5310 will cover the other 80%. Examples of eligible capital expenses that count towards the 55% allocation include:

- The purchase of rolling stock (buses or vans) and related procurements testing inspection and acceptance costs;
- Vehicle rehabilitation and maintenance;
- Radios and communication equipment;
- Wheelchair lifts, ramps and securement devices;
- Passenger amenities (benches, shelters, etc.);
- Computer hardware and software;
- Transit related Intelligent Transportation Systems (ITS);

- Dispatch systems;
- Fare collection systems; and
- Mobility management and coordination programs.

Operating Expenses

The federal share of operating expenses is 50%; the other half must be funded by local match sources. Examples of operating expenses include:

- Fuel and oil;
- Driver salaries and fringe benefits;
- Dispatcher salaries and fringe benefits;
- Licenses;
- Extended warranties;
- Maintenance and repairs;
- Marketing expenses;
- Office supplies;
- Facilities and Equipment rental; and
- Administration of drug and alcohol testing.

Section 5310 Application for Vehicles

Currently, IDOT only allows rolling stock procurements under the Section 5310 program. Despite the fact, federally 5310 has been expanded for capital and rolling stocks. Therefore, the IDOT-Division of Public and Intermodal Transportation (DPIT) is the only 5310 application published annually.

1.6 SELECTING AND OBTAINING VEHICLES

Small transit vehicles generally range between 20 ft. and 25 ft. in length. Depending on the size and seating capacity of the vehicle, it can be classified as small, medium duty and large buses; small buses carry 16-24 passengers, medium duty buses carry 25-35 passengers, and large buses carry over 35 passengers. The Ohio Department of Transportation published a FY 2010-2011 Vehicle Catalog and Selection Guide and available at https://www.dot.state.oh.us/Divisions/Planning/Transit/Documents/Programs/Specialized/Catalog/2010-2011%20Vehicle%20Selection%20Guide.pdf, which details characteristics of various vehicle types and criteria for selecting the proper vehicle based on needs and road conditions. A less detailed but more recent Vehicle Catalog and Selection Guide for FY2014-2015 can be found at http://www.dot.state.oh.us/Divisions/Planning/Transit/Documents/Programs/Specialized/VehicleCatalogAndSelectionGuide.pdf, and the Illinois Department of Transportation Combined Vehicle Procurement (CVP) vehicle catalog can be found at http://www.idot.illinois.gov/Assets/uploads/files/IDOT-Forms/DPIT/DPIT%20CVP%2010.pdf.

The 2007 Texas DOT's *White Paper: Transit Vehicles for Small Urban and Rural Public Transportation Systems in Texas*, available at http://www.regionalserviceplanning.org/coordination/documents/white_papers/transit_vehicles_02-2007.pdf, examines the impact vehicle types have on regional service coordination. "Fitting the fleet" describes operating the appropriate mix of different vehicle types to meet service and customer needs efficiently. Within this white paper a more in-depth analysis of vehicle selection completed by exploring topics such as market conditions, cost benefit analysis of vehicle types, and life cycle costing, etc.

It is recommended that vehicles be procured through the IDOT's CVP procurement process. All information regarding Illinois HSTP Region 8 CVP application process, requirements and evaluation criteria can be found on the HSTP Region 8 website found at http://ecihstp.cuuats.org/grants/.

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1.7 RECRUITING AND TRAINING STAFF

A rural transit system requires a team of qualified and dedicated staff to meet the needs of the public and operate efficiently and safely. Examples of essential staff include:

- Dispatchers;
- Drivers;
- Transit manager;
- Transit director;
- Accounting staff;
- IT technician; and
- Marketing/communications staff.

In many rural and/or small urban communities, many transit operators experience difficulty in sourcing qualified staff, particularly drivers. The safety-sensitive nature of driving responsibilities means the hiring process for drivers is more stringent. Drivers need to be physically and mentally sound. Recommended tests include:

- Eyesight;
- Hearing;
- Alcohol, narcotics and drugs; and
- General physical exam.

Drivers will need to obtain a Commercial Driver License (CDL) to operate a vehicle that transports more than 16 persons at a time, including the driver. At your discretion, you may decide to require drivers to obtain a CDL prior to the time of hire, or you can train them to obtain the CDL so long as they meet the other requirements for obtaining a CDL. Requirements for obtaining a CDL include:

- Must be 18 years old to drive within the State of Illinois and 21 years old to drive outside of Illinois;

- Must have the ability to obtain a medical certificate from a Medical Examiner. Some transit systems recommend or prefer drivers with at least five years of driving experience.

Operators also need to have a clean driving and criminal record. Driving records must be free of driving under the influence (DUI), reckless driving and other safety-related charges or tickets. In terms of criminal records checks, individual agencies set their own policies which determine which crimes disqualify applicants. Employers will also need to determine a prospective driver's rehabilitation if they do have a criminal past. This can be made by assessing how far in the past the crime was committed and consulting recent references.

For more information on recruiting and training staff, as well as other safety and security topics such as vehicle maintenance, drug and alcohol testing and safety data acquisition and analysis, please consult the Safety Guidelines for Rural and Small Urban Transit Agencies by the Texas Transportation Institute and the U.S. Department of Transportation available at http://d2dtl5nnlpfr0r.cloudfront.net/tti.tamu.edu/documents/0-4008-P1.pdf.

1.8 MARKETING AND OUTREACH

Marketing and outreach is a vital step to ensure the success of a transportation operation. Your target population must be made aware of the existence of your service, type of service provided and eligibility requirements. Some components of marketing include community outreach, branding, rider information and awareness, media advertising, customer service, etc.

What is the Marketing and Outreach Tool?

The Marketing and Outreach Tool from My Trip Phase I Toolkit, shown in Figure 6 and available at http://ecihstp.cuuats. org/my-trip/marketing-and-outreach-tools-overview/, outlines a number of strategies utilized to achieve public awareness for rural transportation. Each strategy has a number of activities as part of the overall strategy.

Figure 6 | **Marketing and Outreach Tool**

Marketing and Outreach Tool

Marketing Plan Checklist Guide

A public transit system's primary goal should always involve a customer centered approach that addresses the community's needs; therefore, a public transit system must inform the community of what their services are and the benefits they offer to meet those needs. To accomplish this and to gain buy-in, a public transit system must produce, implement, and evaluate a marketing plan.

A marketing plan does not need to be complex. However, it should contain the following parts: marketing objectives; activities with action steps to meet those objectives; a timeline for implementation; a budget; and a method to evaluate marketing effectiveness.

Before work on a marketing plan begins, clearly establish roles for everyone involved. This guarantees that marketing responsibilities will not fall onto a single person. Directors, staff, and any boards that are developed should be included in the marketing process. Those chosen for such positions must be persistent and have strong leadership skills.

Be realistic about the time and resources you have available and only work on the activities you can

The five main marketing strategies are:

- Community outreach;
- Branding;
- Rider information and awareness;
- Media advertising; and
- Customer service.

How to Use the Marketing and Outreach Tool?

Depending on your unique situation and funding source (Section 5311 vs. Section 5310) the applicability of marketing activities vary. Section 5311 as described in the Funding Chapter is for general public transportation, which means this type of service needs to be marketed to all population groups and for all trip types. Section 5310 funding is designed specifically for persons with disabilities; therefore the marketing for Section 5310 will not be as extensive and

comprehensive as Section 5311. A limited number of Section 5310 vehicles are usually awarded to nonprofits that serve persons with disabilities and older adults (older adults are often mobility challenged). These entities are usually nursing homes and assisted living facilities that typically utilize vehicles to provide transportation for their clients. It is not feasible or practical to advertise Section 5310 service to a wider audience due to both its limited scope (persons with disabilities only) and limited capacity. Table 11 lists the marketing strategies from the MY TRIP Phase I project and details their applicability based on the funding source.

The marketing activities can also be prioritized by time frame. Activities that are strongly recommended are best completed within the first two years of establishing the transit system, recommended activities between years three and five, and optional activities after five years.

Table 11 | Marketing Strategies

	Activity	Section 5311			Section 5310		
		Strongly Recommended	Recommended	Optional	Strongly Recommended	Recommended	Optional
Community Outreach	Develop Local Advisory Boards	Yes					Yes
	Create Community Feedback Forums	Yes			Yes		
	Publish Newsletter			Yes			Yes
	Participate in Community Events		Yes				Yes
	Develop a Travel Training Program		Yes			Yes	
	Participate in Targeted Outreach		Yes		Yes		
Branding	Develop or Enhance Image	Yes			Yes		
	Actively Manage Your Image				N/A	N/A	N/A
Rider Information & Awareness	Develop a Rider Mobility Guide	Yes			Yes		
	Develop a Website	Yes				Yes	
	Utilize Social Media			Yes			Yes
Media Advertising	Embark on a Testimonial Campaign			Yes			Yes
	Participate in Public Speaking Events			Yes			Yes
	Maintain Strong Media and Public Relations		Yes				Yes
	Advertise Public Transit System	Yes					Yes
Customer Service	Market Internally		Yes			Yes	
	Administer Rider and Non-Rider Surveys	Yes				Yes	
	Develop a Customer Feedback System	Yes				Yes	

1.9 RURAL TRAVEL TRAININGS

What is the Travel Training Tool?

Rural travel trainings are training sessions that teach potential riders first-hand how to take public transportation. They can also be provided in the format of "Train the Trainer", where persons, usually mobility managers and transit employees, are taught the most effective methods for teaching various groups how to utilize transit systems. The Rural Travel Training Tool from the My Trip Phase I Toolkit, shown on Figure 7 and available at http://ecihstp.cuuats.org/my-trip/rural-travel-training-documents/, goes into details about training both novice riders and future travel trainers. The Rural Travel Training Tool outlines the three step process for conducting travel training: planning, presenting and follow-up.

Identifying Persons who Need Travel Training

The stakeholder contact tool and the targeted outreach activities from the Marketing and Outreach tool can be utilized to identify potential riders who may be interested in partaking in rural travel trainings. If your potential service is geared towards the general public, you will want to contact stakeholders that represent the interests of each transit dependent group. If you are interested in providing specialized transportation, such Section 5310 (persons with disabilities), you can contact stakeholders that represent persons with disabilities and older adults, since older adults also have a high incidence of physical immobility. These stakeholders can connect you with potential consumers of your transit service.

When to Conduct Travel Training

In the case of establishing new service in rural areas, it is strongly recommended that you conduct travel trainings for potential riders either just before the official start of the service or at the beginning of service. It is important to conduct train the trainer travel trainings far enough in advance (at least one month) of the commencement of service to give future trainers ample time to feel comfortable with both the training material and working with the public. For both new and established services, operators should continue to conduct travel trainings at regularly scheduled intervals to ensure all new potential riders are familiar with how to use your service.

Figure 7 | Rural Travel Training Tool

Rural Travel Training Tool

3 Steps for a Successful Rural Travel Training (RTT)

Step 1: RTT Planning

1. Review RTT Curriculum
2. Contact your HSTP coordinator to assist with first few RTTs
3. Select two 5311 staff (with good communication skills) to co-facilitate the RTT:
   • Administrative: good understanding of policies and procedures, such as transit director, manager, or marketing person
   • Front Line: works directly with riders such as a driver or dispatcher
4. Determine who you want to give an RTT to
5. Pull this group together using:
   • HSTP coordinator for ideas
   • Rider numbers and population maps- pick an area you want to improve ridership
   • Reach out to new groups through Stakeholder Contact Sheet
   • Pick an agency you already work with (may have questions about public transit)
   • Pick a group you want to impact directly (veterans, seniors, housing, etc.)

1.10 RIDER FEEDBACK

Rider feedback is essential to ascertaining whether or not existing levels of service satisfactorily meet the needs of your riders. It is also required by the IDOT to perform satisfaction surveys annually as part of the Section 5311 grant application. If your ridership numbers are inadequate you may want to consider conducting a non-rider survey in your service area as well, in order to gain insight as to why potential riders do not utilize your provided service.

The Rider Survey Tool from the My Trip Phase I Toolkit, shown on Figure 8 and available at http://ecihstp.cuuats.org/rider-survey/, is a three-page survey designed to obtain information about travel behavior, satisfaction with the service, and efficacy of marketing strategies. The fourth page of the survey, the

demographic survey page, although optional, is highly recommended. It is also important for the provider to declare on the survey that filling out the demographic sections of the survey is optional. Demographic data allows the provider to compare the demographic makeup of their riders to the demographic makeup of their community. For example if your service area is 30% low income and 12% seniors but your ridership make up is 10% low income and 45% older adults; this could indicate inequality in marketing and outreach, and that therefore strengthening marketing to underrepresented groups should be a priority. This is especially important for Section 5311 grantees that have to prove that their service is marketed as general public transportation and not specialized program transportation.

Figure 8 | **Sample Rider Survey**
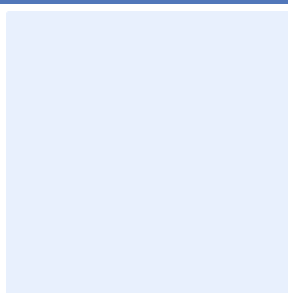
Rider Survey

This is a short two page survey about how Click here to enter Transit System. *is serving its riders. For multiple choice questions below (a,b,c) please circle all that apply. Thank you for taking the time to provide your feedback!*

1. Where in Click here to enter Service Area. do you live?

    _____

c. Advance reservation timeframe
d. Need someone to ride with me
e. Personal health reasons / disability
f. There are no obstacles

Intentionally Left Blank

Chapter 2

Evaluating the Performance of Your Rural Transit Service:

A Performance Based Approach to Setting and Achieving Goals and Objectives

2.1 CREATING A BASELINE

A baseline is data utilized as a starting point for comparison, usually to track progress. For rural transit, typically demand response and deviated fixed transit, the data that is typically needed to create a baseline include:

- Vehicle hours (revenue vs. total hours)
- Vehicle miles (revenue vs. total miles)
- Passenger trips (one-way trips)
- On-time trips
- Project income or farebox
- Operating expenses
- Accident and safety records
- Trip denials
- Customer satisfaction
  - » Affordability
  - » Customer service
  - » Frequency

- » Passenger assistance
- » Scheduling procedures
- » Hours
- » Service area and routes

There are five main methods utilized by transit providers to obtain customer satisfaction data.

TRANSIT USER SURVEYS

The Rider Survey Tool, shown on Figure 9 and available at http://ecihstp.cuuats.org/rider-survey/, from the My Trip Phase I Toolkit is a three-page survey designed to obtain information about travel behavior, satisfaction with the service, and efficacy of marketing strategies. The fourth page of the survey, the demographic survey page, is optional but highly recommended. It is important for the provider to state on the survey that filling out the demographic section is optional.
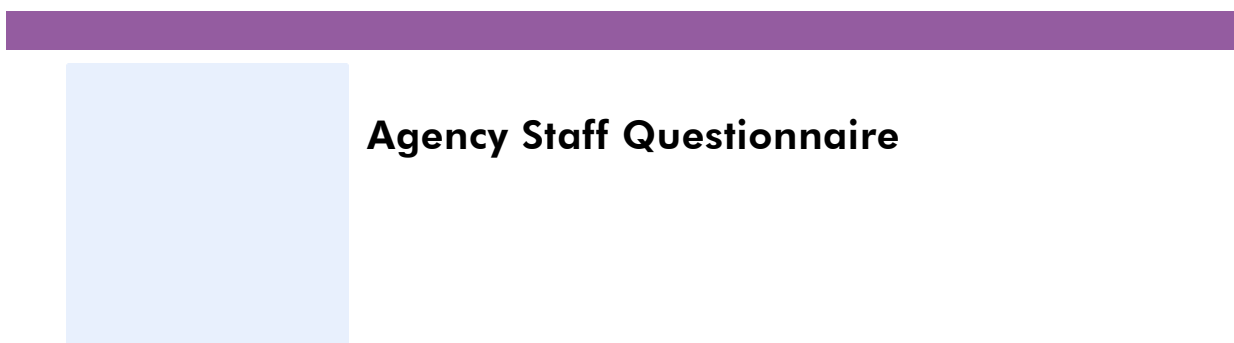
Figure 9 | **Sample Rider Survey**

Rider Survey

This is a short two page survey about how Click here to enter Transit System. *is serving its riders. For multiple choice questions below (a,b,c) please circle all that apply. Thank you for taking the time to provide your feedback!*

1. **Where in** Click here to enter Service

c. Advance reservation timeframe

Demographic data allows the provider to compare the demographic makeup of the riders to the demographic makeup of the community as a whole. For example, if your service area is 30% low income and 12% older adults but your ridership makeup is 10% low income and 45% older adults, this could indicate inequality in marketing and outreach and that strengthening marketing to underrepresented groups should be a priority. This is especially important for Section 5311 grantees that have to prove that their service is marketed as general public transportation and not specialized program transportation. These surveys may be conducted on board with hard copy surveys or they may be done online with survey software such as Survey Monkey.

NON-RIDER SURVEY
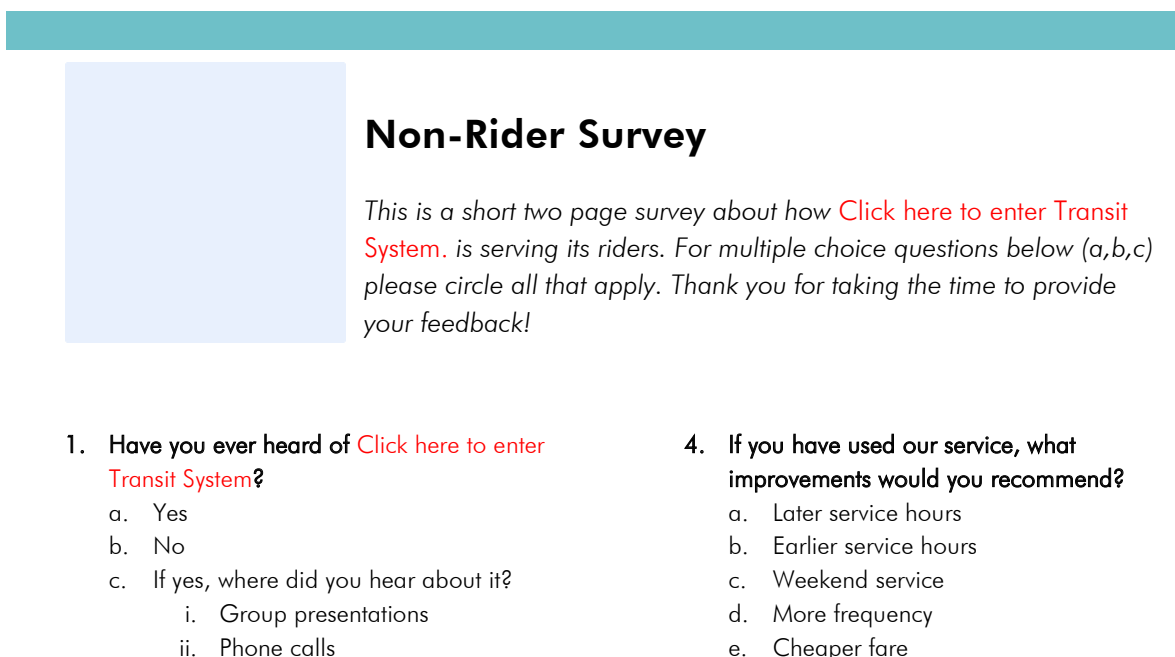
A Non-Rider Survey, shown on Figure 10 and available at http://ecihstp.cuuats.org/non-rider-survey/, will collect data pertaining to the efficacy of your marketing strategies and provide insight into barriers to your transit service. The demographics section of the survey will help identify any particular groups that are being unintentionally excluded from your service.

STAFF SURVEYS

Staff surveys are not directly used to obtain the aforementioned dataset. Transit staff, particularly those who work directly with riders, such as dispatchers, schedulers and drivers, can provide useful insight into challenges and opportunities for the transit agency. It can also help higher-level staff such as supervisors, managers and directors ascertain if staff are familiar with agency policies and procedures. The Agency Staff Questionnaire Template from the My Trip Phase I, shown on Figure 11 and available at http://ecihstp.cuuats.org/agency-staff-questionnaire-1, is a great starting point for staff surveys; you can add and remove questions to suit your agency or your specific purpose.

Figure 10 | **Non-Rider Survey**

Non-Rider Survey

This is a short two page survey about how Click here to enter Transit System. *is serving its riders. For multiple choice questions below (a,b,c) please circle all that apply. Thank you for taking the time to provide your feedback!*

1. Have you ever heard of Click here to enter Transit System?
   a. Yes
   b. No
   c. If yes, where did you hear about it?
      i. Group presentations
      ii. Phone calls

4. If you have used our service, what improvements would you recommend?
   a. Later service hours
   b. Earlier service hours
   c. Weekend service
   d. More frequency
   e. Cheaper fare

Figure 11 | **Agency Staff Questionnaire Template**

Agency Staff Questionnaire

AGENCY NAME: Click here to enter agency name.

SERVICE AREA: Click here to enter service area.

CUSTOMER/CLIENTS SERVED: Click here to enter customer/clients served and to list eligibility requirements.

STAKEHOLDER CONSULTATION

Consulting with stakeholders will provide additional information and insight into selecting target group(s) and service type. Stakeholder consultation provides a richer, more qualitative type of data that can be used in conjunction with quantitative data collected through surveys and transit logs. Consulting and collaborating with stakeholders will also provide a greater opportunity for coordination, improving both the quality of service to be provided and efficiency of the operation. The My Trip Phase I project developed an extensive Stakeholder Contact Tool, shown on Figure 5 and available at http://ecihstp.cuuats.org/my-trip/stakeholder-contact-tool/.

What is the Stakeholder Contact Tool?

The Stakeholder contact tool is a list of potential stakeholders with a vested interest in your community and/or rural transportation. It classifies the stakeholders in the following groups:

- Public transit;
- Private transportation;
- Medical services;
- Seniors;
- Persons with disabilities;
- Religious community groups;
- Government agencies, staff and elected officials;
- Youth and families;
- Justice;
- Community service agencies and volunteer groups;
- Housing;
- Veterans;
- Education;
- Economic planning and development;
- Employment;
- Business and recreation;
- Multicultural; and
- Media.

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Each stakeholder group contains a list of entities that are likely to be in your community and that are worth contacting. The tool also describes where to look for possible information about these entities.

Why Contact These Groups?

Each stakeholder group has a unique set of interests and variety of perspectives and insight into providing rural transportation. The insight they provide may be from the perspective of the rider, the provider or even the trip purpose. Some stakeholders provide information on the rules, regulations and legislative framework for working with certain population cohorts. Table 12 shows the various insights that each stakeholder group can provide. These groups can also provide insight into possible service contract revenue sources. Service contracts are discussed in the funding chapter.

How to Use the Stakeholder Contact Tool?

The information you have collected from the transit user survey will tell you important information regarding the demographic makeup of your riders. Once you have identified the share of each transit dependent group in your community, you can use Table 12 to prioritize and select which stakeholder groups you would benefit most from contacting. You can then use the Stakeholder

Tool from MY TRIP Phase I to contact the entities within your selected stakeholder groups.

You can obtain information from and work with your stakeholders in a number of ways, including:

- Interviews;
- Focus groups;
- Surveys/questionnaires;
- Working groups;
- Advisory groups;
- Steering committees; and
- Formal committees.

TRANSIT LOGS

Transit logs will provide the bulk of operational performance data. Transit logs are usually collected and maintained by drivers and transit managers. Transit log sheets for demand response transportation typically provide the means for collecting the following data:

- Vehicle hours (revenue vs. deadhead vs. total)
- Vehicle miles (revenue vs. deadhead vs. total)
- Number of one-way trips
- On-time performance
- Project income or farebox

Table 12 Stakeholder Group Perspective and Insight

Stakeholder Group	Target Groups, Insight and Perspective
Public Transit	Public transit supplies provider perspective and insight into challenges facing transit in your community. Service challenges may be related to certain neighborhoods or communities, certain population groups, and even trip types.
Private Transportation	Private providers usually meet transportation needs when transit is either unavailable or impractical. Utilizing these providers can be cost-prohibitive for some groups. Data on the use of these providers can offer insight into the need for affordable transportation options.
Medical Services	Medical trips usually provide a unique set of challenges. Persons needing medical transportation are usually older adults and persons with disabilities.
Seniors	Seniors
Persons with Disabilities	Persons with disabilities
Religious Community Groups	Religious groups typically work with vulnerable groups in the community: most frequently youth, older adults, persons with disabilities and persons with low income. These religious groups can provide insight into the needs of the groups and can also provide special programs geared towards these groups. This may necessitate special program transportation.
Government Agencies, Staff and Elected Officials	This group is usually familiar with many issues in a community and can provide insight into a community's support for certain projects.
Youth and Families	Youth
Justice	Agencies in this group typically work with vulnerable groups that are sometimes difficult to provide program transportation for, such as ex-convicts, domestic violence survivors, parolees, low income persons, etc.
Community Service Agencies and Volunteer Groups	Community service and volunteer groups typically work with vulnerable groups, such as low income persons, persons with disabilities, older adults, and youth, all of whom are classified as transit-dependent.
Housing	Housing agencies typically work with low income persons.
Veterans	The share of veterans with severe disabilities has been steadily increasing since 2000, and a significant number of veterans are older adults.
Education	Education providers usually serve the youth population and typically require some type of program transportation.
Economic Planning and Development	Planning and development departments can provide data, plans, assistance and resources needed to properly plan and implement your transportation service.
Employment	Employment stakeholders typically work with low income persons.
Business and Recreation	Business and recreation stakeholders usually represent major trip generators in the community.
Multicultural	Immigrants face transportation challenges that mainly pertain to language barriers and unfamiliarity with transportation in the United States.
Media	Local media can provide assistance with getting the word out about your potential new service

Figure 12 shows an example of a completed demand response transportation log sheet for revenue miles and hours. This example is more detailed that most transit logs and is designed for maximum insight and data collection for operating efficiency. Figure 13 is a transit log sheet for non-revenue miles and hours. The definitions below, from the National Transit Database, will assist you in classifying different types of miles and hours that are typically incurred during the provision of transit services. The Venn diagram in Figure 14 illustrates the relationship between the varying types of miles and hours.

- Odometer Miles: Mileage shown on the odometer.

- Actual Miles/Hours: The hours and miles that a vehicle travels while in revenue service. It also includes deadhead hours, miles layover and recovery time.

- Deadhead Miles/Hours: The miles and hours that a vehicle travels when out of revenue service. Deadhead includes leaving or returning to the yard or garage facility, changing routes and when there is no expectation of carrying revenue passengers.

- Revenue Miles/Hours: The miles and hours that a vehicle travels when it is available to paying passengers. Paying passengers refer to those paying the fare directly or through some other contractual arrangement. Revenue service also includes the carriage of passengers who do not pay a fare for specific trips.

Many different brands and types of Computer Aided Dispatch and Scheduling (CADS) software may also be utilized to collect transit log data. Technology assisted data collection is recommended for deviated fixed transportation, as paper logs will ultimately slow down service and have greater potential for errors in the faster-paced environment of deviated fixed transportation.

The collected information is then utilized to calculate service/revenue miles, service/revenue hours, on-time performance, and number of one-way trips.
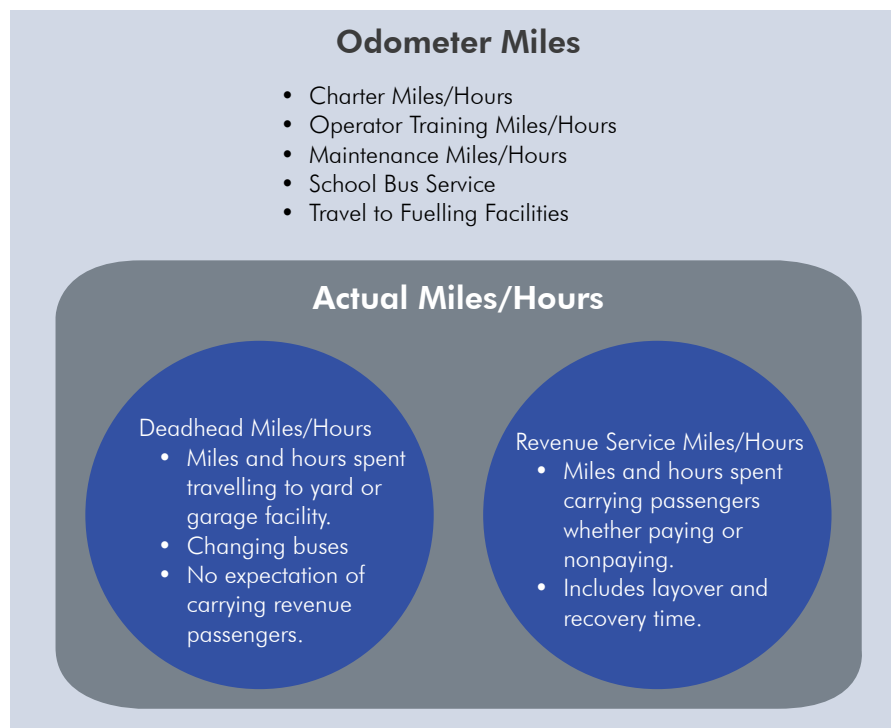
Figure 12 | **Revenue Service Log Sheet Example**

Revenue Service Transit Log Sheet
ABC Transit Service
203 E Some Street
Somewhere IL, 12345

Driver Name	David Johnson			**Day of the Week**	Saturday
Date	02/05/2015	**Start Time**	6:30 a.m.	**Start of Day Odometer Reading**	53,247
License Plate #	R74-2594	**End Time**	12:00 p.m.	**End of Day Odometer Reading**	53,305
Vehicle #	56	**Total Daily Hours**	5 hours 30 minutes	**Total Daily Miles**	58
		Total Daily Revenue Miles*	4 hours 42 minutes	**Total Daily Revenue Hours***	45

Passenger Name	Passenger Contact #	Pick-Up Location	Destination	Collected Fare	Trip Type	Scheduled Pick-Up Time	Actual Pick-Up Time	On-time	Drop-off Time	Lift Use	Start Odometer	End Odometer
Peggy Sue Smith	217-547-8961	124 S Locust St, Arcola	Arcola Family Foods 117 W Washington St, Arcola	$2.00	Shopping	6:45 a.m.	6:52 a.m.	X	7:02 a.m.	X	53,251	53,255
Samantha Hamilton	312-378-4452	54 Pine Dr, Arcola	Life Pointe Church 700 E Main St, Arcola	$5.00	Personal	8:30 a.m.	8:55 a.m.		9:15 a.m.		53,260	53,266
Raymond Brown	312-247-6912	6 Madison St, Arcola	First Mid Illinois Bank 249 W Springfield Rd, Arcola	$5.00	Personal	10:00 a.m.	9:56 a.m.	X	10:30 a.m.		53,273	53,277
Eunice James	217-307-6399	366 E 4th St, Arcola	SBL Arcola Clinic 241 W Springfield Rd, Arcola	$2.00	Medical	10:15 a.m.	10:12 a.m.	X	11:02 a.m.	X	53,275	53,281
Patrick Morgan	312-608-6040	1128 Egyptian Rd, Arcola	US Post Office 107 S Oak St, Arcola	$5.00	Employment	11:00 a.m.	11:12 a.m.		11:34 a.m.		53,288	53,296

Total One Way Trips	5	Total On Time Trips	3	Total Fare Collected	$19	Total Lift Trips	2

Medical	Shopping	Employment	Education	Personal	Social
1	1	1	0	2	0

*Revenue miles are calculated using the odometer reading of the first passenger pick up and last passenger drop off. Revenue hours are calculated using the first actual pick up time and the last drop off time.

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Figure 13 | Non-Revenue Service Transit Log Sheet Example

Non-Revenue Service Transit Log Sheet
ABC Transit Service
203 E Some Street
Somewhere IL, 12345

Driver Name David Johnson	**Training Instructor (if applicable)** Dana Arnold	**Day of the Week** Monday
Date 02/05/2015	**Start Time** 9:02 a.m.	**Start of Day Odometer Reading** 53,450
License Plate # R74-2594	**End Time** 9:27 p.m.	**End of Day Odometer Reading** 53,769
Vehicle # 56	**Total Non-Revenue Daily Hours** 12 hours 25 minutes	**Total Non-Revenue Daily Miles** 319

*Revenue miles are calculated using the odometer reading of the first passenger pick up and last passenger drop off. Revenue hours are calculated using the first actual pick up time and the last drop off time.

Starting Location	Ending Location	Purpose	Starting Time	Ending Time	Start Odometer	End Odometer
Garage Facility	Regional Maintenance Facility 1101 E University Ave Urbana IL 61802	Maintenance	9:02 a.m.	10:01 a.m.	53,450	53,500
Regional Maintenance Facility	Garage Facility	Return to Garage	1:14 p.m.	2:03 p.m.	53,500	53,550
Garage Facility	Garage Facility	Training and Fuelling	2:30 p.m.	3:45 p.m.	53,550	53,592
Garage Facility	201 E Main Street, Arcola	Leaving Garage Facility	4:00 p.m.	4:08 p.m.	53,592	53,600
201 E Main Street, Arcola	IDOT Springfield	Charter	4:20 p.m.	6:00 p.m.	53,600	53,680
IDOT Springfield	201 E Main Street, Arcola	Charter	7:25 p.m.	9:05 p.m.	53,680	53,760
201 E Main Street, Arcola	Garage Facility	Return to Garage Facility	9:15 p.m.	9:27 p.m.	53,760	53,769

Figure 14 | **Venn Diagram - Varying Classifications of Miles and Hours**

Odometer Miles

- Charter Miles/Hours
- Operator Training Miles/Hours
- Maintenance Miles/Hours
- School Bus Service
- Travel to Fuelling Facilities

Actual Miles/Hours

Deadhead Miles/Hours
- Miles and hours spent travelling to yard or garage facility.
- Changing buses
- No expectation of carrying revenue passengers.

Revenue Service Miles/Hours
- Miles and hours spent carrying passengers whether paying or nonpaying.
- Includes layover and recovery time.

TRIP DENIALS

For demand response service, trip denials is a good performance measure for service quality. Trip denials are trips that are requested that you are unable to accommodate within one hour of the requested trip time.

OPERATING EXPENSES

Fiscal data will allow you to measure how efficiently you are using transit dollars. Both revenues and expenses will need to be collected and tracked by qualified accounting staff at the transit agency. The various types of expenses and revenues that need to be tracked are defined below according to the National Transit Database and Federal Transit Administration.

Revenues

Farebox

All income received directly from passengers, paid either in cash or through pre-paid tickets, passes, tokens, etc. It includes donations from those passengers in a user-side subsidy arrangement. It also includes payments made through an agreement to provide fare-free service for a certain group, e.g. payments from a university to provide free service to students.

Contract Revenue

Payments received by any organization, government, agency or company as a result of a formal contractual agreement with the transit service operator for trips provided to a specific passenger or group of passengers.

Grant Funds

Grant funding received from government or private entities for the specific purpose of providing transportation services. Usually,

transit agencies have very little influence over their funding allocation of FTA grants, such as Downstate Operating Assistance Program (DOAP) and Section 5311, as these are determined by a set formula based on demographics of the service area. Allocations for other government grants, such as Downstate Transit Investment Fund (DTIF) and Section 5310, are all determined by the availability of funds and demonstrated need by the applicant. For more information on these federal grant programs please see the "Chapter 1: Establishing a Non-Profit Organization for the Provision of Rural Transit Service".

Expenses

Operating Expenses

The expenses associated with the operation of the transit agency. Examples of operating expenses include:

- Fuel and oil;
- Driver, dispatcher and mechanic salaries and fringe benefits;
- Travel expenses for operating staff;
- Vehicle insurance;
- Telephone and other utilities;
- Licenses;
- Extended warranties;
- Maintenance and repairs;

- Marketing;
- Office supplies;
- Facilities and equipment rental; and
- Administration drug and alcohol testing.

Administrative Expenses

Administrative expenses are non-operating expenses. Examples of administrative expenses include:

- Salaries and fringe benefits for directors, secretaries, bookkeepers;
- Audit;
- Legal service;
- Travel for administrative staff;
- Advertising;
- Subscriptions and membership fees;
- Training programs; and
- Indirect cost.

Capital Expenses

Capital expenses include the acquisition, construction and improvement of transit facilities and equipment. Examples of capital expenses include:

- Vehicles;
- Communication equipment;
- Wheelchair lifts;
- Computer hardware and software; and
- Office furniture.

ACCIDENTS AND SAFETY RECORDS

The datasets required to track a transit agency's safety record the number of collisions, injuries and fatalities and how many of the collisions were the fault of agency's driver.

2.2 PERFORMANCE MEASURES

Performance measures allow you to evaluate service based on non-subjective quantitative parameters or indicators. Performance measures tell the transit agency if they are meeting previously set goals and help them identify areas for improvement. Performance measures quantify effectiveness, efficiency, quality, safety and security, and rider satisfaction. The explanations of performance measures below will show how the data collected in the previous chapter is utilized to calculate performance measures.

EFFECTIVENESS

In rural transit service, effectiveness is a measure of output (number of trips) versus the effort (actual miles and actual hours) required to produce that output. Therefore, the two major performance measures for service effectiveness are Trips/Mile and Trips/Hour:

$$\text{Trips/Mile} = \frac{\textbf{Total Number of One-Way Trips Provided (year, quarter or month)}}{\textbf{Vehicle Miles (year, quarter or month)}}$$

$$\text{Trips/Hour} = \frac{\textbf{Total Number of One-Way Trips Provided (year, quarter or month)}}{\textbf{Vehicle Hours (year, quarter or month)}}$$

Source: A Guidebook for Developing a Transit Performance-Measurement System, TCRP 88, 2003

Cost effectiveness is a measure of output (number of trips) versus the cost required to produce that output. The major performance measure of cost effectiveness is Cost/Trip:

$$\text{Cost/Trip} = \frac{\textbf{Total Cost of Providing Revenue Service (year, quarter or month)}}{\textbf{Total Number of One-Way Trips Provided (year, quarter or month)}}$$

Source: A Guidebook for Developing a Transit Performance-Measurement System, TCRP 88, 2003

EFFICIENCY

Efficiency measures the ability to provide service output (miles and hours) as a function of service inputs (operating and administrative expenses). The two performance measures for efficiency are Cost/Mile and Cost/Hour:

$$\text{Cost/Mile} = \frac{\textbf{Total Cost of Providing Revenue Service (year, quarter or month)}}{\textbf{Vehicle Miles (year, quarter or month)}}$$

$$\text{Cost/Hour} = \frac{\textbf{Total Cost of Providing Revenue Service (year, quarter or month)}}{\textbf{Vehicle Hours (year, quarter or month)}}$$

Source: A Guidebook for Developing a Transit Performance-Measurement System, TCRP 88, 2003

Farebox Recovery Ratio

Farebox recovery ratio refers to the percentage of operating and administrative expenses that are covered by passengers paying a fare. It is rare for revenue from fares to cover all operating and administrative expenses associated with providing public transit. The method for calculating the farebox recovery ratio is shown below.

$$\text{Farebox Recovery Ratio} = \frac{\text{Total Revenue from Fares (year or quarter)}}{\text{Total Operating and Administrative Costs (year or quarter)}}$$

Source: A Guidebook for Developing a Transit Performance-Measurement System, TCRP 88, 2003

Farebox recovery ratios tend to be lower in rural systems due to lower population densities and limitations associated with demand response transportation. Farebox is not a good indicator for efficiency, but it can be a source of relief in situations of fiscal constraints.

SERVICE QUALITY

The performance measures for service quality are usually described in terms of level of service. The various quality levels of service performance measures are described below.

On-Time Performance

On-time performance measures the percentage of trips where clients were picked up on time. On-time for fixed transit is usually defined as taking place within 5 minutes of the scheduled time. The definition for on-time varies in demand response transportation, because each agency can define its own window for what is considered "on-time," but it usually ranges between 15-30 minutes. Tables 13 and 14 below show the on-time performance percentages and their corresponding levels of service for demand response and fixed route transit.

Level of Service (LOS) in terms of public transportation refers to a set of quality of service measurements that give the operator an idea of the level of comfort and convenience of their service. Level of service measurements vary for fixed route transit and demand response transportation. For fixed route transit, level of service is typically measured on an alphabet scale from A-F, with A being most convenient and F being least convenient. Demand response transit in measured on a numerical scale from 1-8, with 1 being most convenient and 8 being the least convenient.

Response Time

Response time applies to demand response service and refers to the amount of time in advance that a rider has to schedule rides. The highest level of service for demand response transportation is under half an hour, while the lowest level of service is more than two weeks. Table 15 shows the various levels of service for demand response transportation.

Table 13 **On-Time Performance Level of Service for Demand Response Transit**

LOS	On-Time Percentage	Comments
1	97.5-100.0	1 late trip/month
2	95.0-97.4	2 late trips/month
3	90.0-94.9	2-4 late trips/month
4	85.0-89.9	5-6 late trips/month
5	80.0-84.9	7-8 late trips/month
6	75.0-79.9	9-10 late trips/month
7	70.0-74.9	11-12 late trips/month
8	<70.0	More than 12 late trips/month

Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

Table 14 **On-Time Performance Level of Service for Fixed Route Transit**

LOS	On-Time Percentage	Comments
A	95.0-100	1 late transit vehicle every 2 weeks (no transfer)
B	90.0-94.9	1 late transit vehicle every week (no transfer)
C	85.0-89.9	3 late transit vehicles every 2 weeks (no transfer)
D	80-84.9	2 late transit vehicles every week (no transfer)
E	75.0-79.9	1 late transit vehicle every day (with a transfer)
F	<75.0	1 late transit vehicle at least daily (with a transfer)

Source: TCRP Report 100, 2nd Edition, Transit Capacity and Quality of Service Manual, 2003

Table 15 **Response Time Level of Service for Demand Response Transportation**

LOS	On-Time Percentage	Comments
1	Up to ½ hour	Very prompt similar to taxi service
2	Between ½ hour and 2 hours	Prompt considered immediate response for DRT
3	More than 2 hours but still same day	Requires planning but one can still travel on the day the trip is requested
4	24 hours in advance; next day service	Requires some advance planning
5	48 hours in advance	Requires more advance planning than next-day service
6	Between 48 hours and 1 week	Requires advance planning
7	Between 1 week and 2 weeks	Requires considerable advance planning, but may still work for important trips
8	More than 2 weeks	Requires significant advance planning or service is not available

Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

Table 16 | **Headway Level of Service for Fixed Route Transit**

LOS	Average Headway (min)	Vehicle/Hour	Comments
A	<10	>6	1 late transit vehicle every 2 weeks (no transfer)
B	10-14	5-6	1 late transit vehicle every week (no transfer)
C	15-20	3-4	3 late transit vehicles every 2 weeks (no transfer)
D	21-30	2	2 late transit vehicles every week (no transfer)
E	31-60	1	1 late transit vehicle every day (with a transfer)
F	>60	<1	1 late transit vehicle at least daily (with a transfer)

Source: TCRP Webdoc 6-E, Transit Capacity and Quality of Service Manual – Part 5

Table 17 | **Service Hours and Days Level of Service for Demand Response Transit**

	Days/Week						
Hours/ Day	6-7	5	3-4	2	1	0.5*	<0.5
>16.0	LOS 1	LOS 2	LOS 4	LOS 5	LOS 6	LOS 7	LOS 8
12.0-15.9	LOS 2	LOS 3	LOS 4	LOS 5	LOS 6	LOS 7	LOS 8
9.0-11.9	LOS 3	LOS 4	LOS 4	LOS 6	LOS 6	LOS 7	LOS 8
4.0-8.9	LOS 5	LOS 5	LOS 5	LOS 6	LOS 7	LOS 7	LOS 8
<4.0	LOS 6	LOS 6	LOS 6	LOS 7	LOS 8	LOS 8	LOS 8

Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

Table 18 | **Trip Denial Level of Service for Demand Response Transportation**

LOS	Trip Denial Percentage	Comments
1	0-1	No trips denied/month
2	>1-2	1 trip denied/month
3	>2-4	1-2 trips denied/month
4	>4-6	2 trips denied/month
5	>6-8	3 trips denied/month
6	>8-10	4 trips denied/month
7	>10-12	5 trips denied/month
8	>12	More than 5 trips denied/month

Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

Headway

Headway is the frequency of vehicles along a single route. Instead of response time level of service, fixed route and deviated fixed route transit utilize headway level of service. Table 16 shows the various levels of service for fixed route transit, ranging from less than ten minutes to greater than one hour.

Service Days and Hours

Response time and headway are not the only performance measures for service availability; service days and hours are also good indicators of the availability of transit service to the public. Table 17 typically describes service hours and days levels of service for demand response transportation; however, these levels of service may also be applicable for rural deviated fixed transportation.

Trip Denial

Trip denial level of service is only applicable to demand response transportation because deviated fixed and fixed route transportation do not require rides to be scheduled in advance. Trip denials are rides that cannot be accommodated within one hour of the originally requested trip time. Table 18 shows the highest level of service, if no trips are denied per month, and the lowest level of service, if a trip denial rate is greater than 12% or more than 5 trips are denied per month.

SAFETY AND SECURITY

Safety and security performance measures evaluate the likelihood that a rider or employee will be involved in an accident or become a victim of a crime. Quantitative data obtained from accident/incident reports, as well as qualitative survey data measuring perceptions of safety and security, may be used.

$$\text{Accident Rate} = \frac{\text{Total Vehicular and/or Passenger Accidents (year, quarter or month)}}{\text{Total Revenue Miles or Total Revenue Hours (year, quarter or quarter)}}$$

$$\text{Crime Rate} = \frac{\text{Total Crimes Committed (year, quarter or month)}}{\text{Total Revenue Miles or Total Revenue Hours (year, quarter or quarter)}}$$

Source: National Cooperative Highway Research Program, August 2012, Data Needs for Assessing Rural Transit Needs, Benefits, and Levels of Service.

Accident and Crime Rates

Accident and crime rates are the number of accidents or crimes that occur over a specified period of time or per specified unit of service output, either miles or hours. For demand response transportation, accidents or crimes usually occur on board the vehicle, while accidents can occur on vehicles, at stops or at transfer hubs for deviated fixed and fixed route transit service. You can also differentiate or classify your accidents based on a number of characteristics, such as fatal vs. non-fatal, passenger vs. employee and vehicular vs passenger (slips, falls, etc.).

Percent Positive Drug/ Alcohol Tests

It is recommended that persons in safety sensitive positions, especially drivers, undergo random drug and alcohol testing. Recipients of Section 5311 funding are required by the FTA and IDOT regulations to comply with random drug and alcohol testing rates.

Employee Work Days Lost to Injury

Unsafe working environments, whether onboard the vehicle or at the office/garage facility, will result in a higher potential for employee injuries and accidents. These accidents can result in increased costs for

the operator in the form of paid sick leave, workers' compensation, loss of productivity to recruit new staff, etc.

Number of Traffic Tickets Issued to Drivers

Drivers who drive unsafely pose a great risk to the overall safety of your transit operations and can incur significant cost, particularly with insurance and litigation costs. Unsafe drivers pose a risk to themselves, passengers, other drivers and pedestrians. A good indicator of the driving practices of your drivers is the number of traffic tickets issued.

Number of Vehicles with Required Safety Equipment and Supplies

It is highly unlikely to avoid the occurrence of all accidents, incidents and crimes. It is possible to mitigate the severity of outcomes if vehicles, garage and office facilities are equipped with adequate safety supplies, such as first aid kits, fire extinguishers, and biohazard kits. Technology can also be used as safety equipment, including cameras, intercom systems, emergency alarms, and AVL equipment.

RIDER SATISFACTION

Rider satisfaction measures how satisfied your riders are with various aspects of your service. Rider satisfaction has a significant impact on ridership and therefore farebox, efficiency and effectiveness. Rider satisfaction can also provide you with information on what aspects of your service you should prioritize for improvement. Rider satisfaction is usually obtained through surveys and measured using Likert Scales, which usually use a predetermined scale of 1-5, 1-10, etc., generally with one being least satisfied and five or ten being most satisfied. The example below shows how average satisfaction rating is calculated from a sample of respondents. The

example details the responses on 10 survey participants to a single Likert Scale satisfaction survey question.

> On a scale of 1-10 please rate your satisfaction with our hours of service, with 1 being least satisfied and 10 being most satisfied:

$$\text{Average Satisfaction with Hours of Service} = \frac{\text{Sum of Ratings of All Respondents}}{\text{Number of Respondents}}$$

$$= \frac{52}{10} = 5.2$$

Respondent	Rating
A	5
B	3
C	7
D	6
E	7
F	2
G	5
H	8
I	5
J	4
Sum of Rating	52

For rural transit, rider satisfaction surveys can be used to measure satisfaction with:

- Affordability;
- Customer service;
- Frequency;
- Passenger assistance;
- Scheduling procedures;
- Hours;
- Service area/routes; and
- Perceptions of safety and security.

Rider satisfaction surveys are available from the Rider Survey Tool shown on Figure 9 and available at the MY TRIP website at http://ecihstp.cuuats.org/rider-survey/.

2.3 SETTING GOALS AND OBJECTIVES

After collecting baseline data and calculating baseline performance measures, you can now set goals and Specific, Measureable, Achievable, Realistic, and Timely (SMART) objectives. A goal is a broad primary outcome, while an objective is a specific measurable outcome used to quantify progress. Goals usually use broad general terms like increase, decrease, maintain, improve, etc., and are usually complementary to the transit operators' overall mission and vision. Objectives would identify specific quantifiable outcomes with a distinct timeline. Objectives are usually classified by short (1-2 year time frame), medium (3-5 year time frame) and long term (over 5 year time frame) objectives. Figure 15 shows the relationship between a broad

mission statement, goals and objectives.

The two main methods for setting goals and objectives based on your baseline performance measures are: 1) Peer comparison and 2) Stakeholder consultation.

Peer Comparison

Comparing the performance of your transit service to similar transit services provides benchmarks for you to set goals based on what those comparable communities or counties have accomplished. There are a number of criteria that you should look for when finding comparable systems; it may not be possible to find a system that has all the same

Figure 15 | **Relationship Between Mission, Goal and Objective**

MISSION STATEMENT
Provide high-quality affordable transit service to the people of rural Douglas County

GOAL
Improve accessibility of rural transit service in Douglas County

OBJECTIVE
Achieve a trip denial rate of 2% or less by 2018
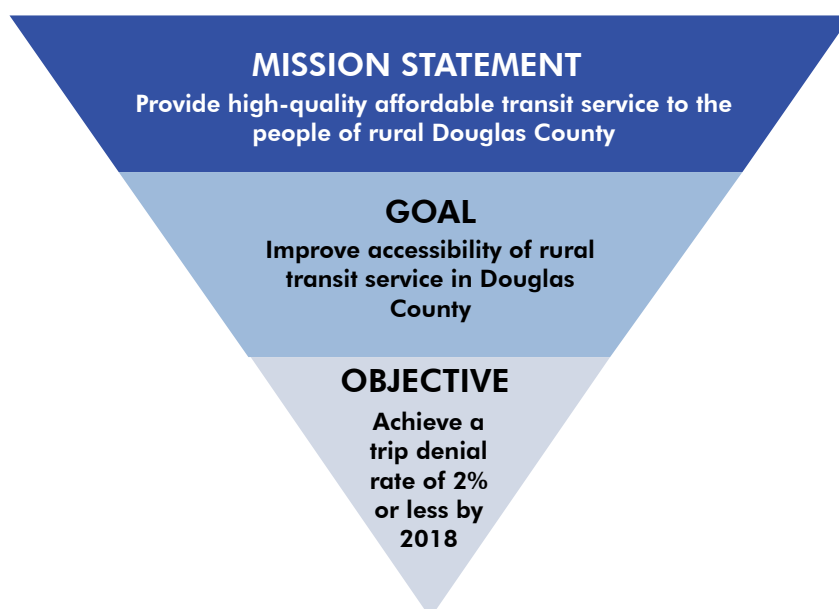
characteristics as yours. However, Table 19 above shows a list of characteristics in order of importance. The best place to start when obtaining data for rural systems to ascertain if they are comparable to your operation is the National Transit Database (NTD). The NTD completes an annual Rural Transit Factbook that provides statistics on rural transit agencies.

You can obtain data for peer comparison from the NTD rural database found at the website http://www.ntdprogram.gov/ntdprogram/

(Figure 16). NTD only surveys general public operators. Table 20 shows a summary of performance measures for various rural transit systems based on a number of characteristics. This table does not provide all characteristics and is based on 2007 data, but it is a good place to start.

You can also collect your own primary data from transit agencies in your region if you find it difficult to obtain data for the characteristics you desire to match. The Service Information

Table 19 | **Peer Comparison Characteristics**

Stakeholder Group	Target Groups, Insight and Perspective
Target Population	General Public vs Specialized (persons with disabilities, older adults, etc.)
Type of Service	DRT*, fixed, deviated fixed
Urban/Rural Classification	The FTA classifies rural areas as having a population under 50,000 people; however, the Census further differentiates this classification as Urban Cluster, between 2,500-50,000 people, and Rural, below 2,500 people.
Total Transit Dependent Population	Although there is not an established classification for total transit dependent population, it is recommended that comparable areas have a total transit dependent population + 50,000
Service Area	Area size: Single county vs. multi-county
Fleet Capacity	According to the National Transit Database, in 2011the average rural fleet size was 16.6 vehicles per agency; therefore, classification could be above or below average vehicles per agency. It could also be based on the sum of all seats on all operating vehicles in your system.
Rural Area Proximity to Urban Centers	Adjacent to metropolitan area (over 50,000 people) vs. adjacent to micropolitan area (10,000-50,000 people) vs. not adjacent to metro or micropolitan areas.
NTD Region	Illinois is in NTD** Region V, which consists of Illinois, Indiana, Ohio, Michigan, Wisconsin and Minnesota
Operator	County, MTD***, Non-Profit
Passenger Assistance	Door-to-Door, Curb-to-Curb, Door-through-Door

Increasing Importance

*DRT: Demand Response Transportation
**NTD: National Transit Database
***MTD: Mass Transit District

Figure 16 | NTD Website Showing Rural Database
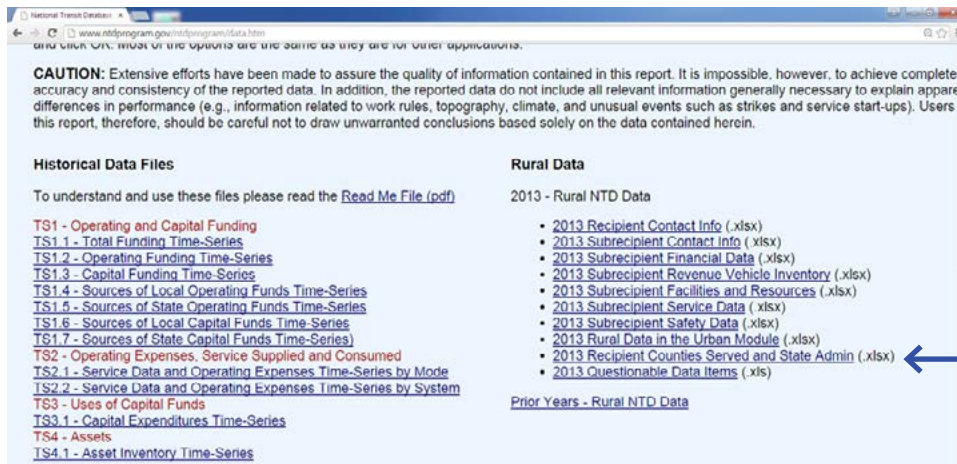
Rural datasets classified by information type

Table 20 | Rural Transit Fact Book 2014

Service-Area Type	Low	High	Average	Standard Deviation	N
All Rural DR Only Systems					
Passenger Trips/Vehicle Hour	0.49	9.93	3.36	1.74	
Operating Cost/Vehicle Hour	$11.85	$79.92	$34.33	$13.22	
Operating Cost/Vehicle Mile	$0.75	$7.64	$2.32	$1.09	479
Operating Cost/Passenger Trip	$2.54	$68.14	$12.55	$7.82	
Rural DR Only Systems Serving a Municipal Area					
Passenger Trips/Vehicle Hour	1.49	9.93	4.44	2.05	
Operating Cost/Vehicle Hour	$15.05	$77.27	$34.33	$12.99	
Operating Cost/Vehicle Mile	$1.31	$7.64	$3.12	$1.33	102
Operating Cost/Passenger Trip	$2.54	$38.42	$9.07	$5.26	
Rural DR Only Serving a Single County Area					
Passenger Trips/Vehicle Hour	0.49	8.98	3.13	1.49	
Operating Cost/Vehicle Hour	$14.49	$79.92	$34.86	$13.67	
Operating Cost/Vehicle Mile	$0.75	$5.93	$2.09	$0.85	262
Operating Cost/Passenger Trip	$3.76	$68.14	$13.36	$8.38	
Rural DR Only Serving a Multi-County Area					
Passenger Trips/Vehicle Hour	0.61	8.31	2.91	1.53	
Operating Cost/Vehicle Hour	$11.85	$61.75	$32.84	$11.83	
Operating Cost/Vehicle Mile	$0.79	$6.97	$2.13	$0.99	115
Operating Cost/Passenger Trip	$4.66	$54.46	$13.77	$7.53	

Source: Rural Transit Fact Book, 2014

Figure 17 | Service Information Survey Template

Service Information Survey

Click here to enter Service Area.

Disclaimer:		Last Updated:	
Public Transit System Contact & Service		Routes	Area, Hours, & Days
Name:		General Public: ☐ Demand Response ☐ Fixed ☐ Flexible ☐ Other	
Phone#:	Address:		
TTY#:	City, State, Zip:		
Website:		Out of Service Area:	
Email:			
Fares & Alternative Fares:			
		Other Special &	

Survey Template from the MY TRIP Phase I Toolkit shown on Figure 17 is available at http://ecihstp.cuuats.org/my-trip/ and it is designed to obtain data for performance comparison. To identify which transit agencies to survey, you can follow the following steps.

1. Identify sub-recipients from the rural NTD database with the same service type (fixed vs. deviated fixed vs. demand response).

2. Narrow the sub-recipients based on your region.

3. Collect Census data for those counties: total population, total transit dependent population (sum of persons with disabilities, persons with low income, older adults)

4. Survey a sample of sub-recipients from the counties identified.

Stakeholder Consultation

Peer comparison represents a quantitative approach to setting goals, while consulting stakeholders in your community is more qualitative. The extensive Stakeholder Contact Tool from the MY TRIP Phase I Toolkit, shown in Figure 18 and available at http://ecihstp.cuuats.org/my-trip/stakeholder-contact-tool/, lists a number of potential stakeholders classified into 18 groups.

Stakeholder Groups (Outlined in Yellow) - These are the common fields in every community that contain mobility needs and resources. To truly focus on riders, you will want to include and represent as many stakeholder groups as possible.

Stakeholder Agencies (Outlined in Blue) - These are organizations under different Stakeholder Groups, feel free to add any additional agencies to the end of the sheets.

How to Find Stakeholders in Your County (Outlined in Red) - This is divided into two sections: Where to look for stakeholders and Possible Websites with a directory or information on local/regional agencies.

Figure 18 | **Stakeholder Contact Tool**

How to Find Stakeholders

Stakeholder Groups	Stakeholder Agencies	Where To Look:	Possible Websites:
Public Transit	Local Public Transit Systems	Tranpro Statewide Public Provider directory website to search by county, or check phonebook, or Yahoo Local/Yellow Pages online. Make sure to include both Urban and Rural providers in the surround area.	www.utc.uic.edu/tranpro/clickmap.php
	Regional Coordinators	Tranpro Statewide Public Provider directory website to search by region for IL Human Service Transportation Plan (HSTP) Coordinators	www.utc.uic.edu/tranpro/clickmap.php
	IDOT Staff	IL Department of Transportation (IDOT) website's Division of Public and Intermodal Transportation (DPIT), right-hand side has specific programs and contacts listed	www.dot.il.gov/dpit/index.html
Private Transportation	Taxi Companies / Private Shuttles	Yahoo Local/Yellow Pages online or phonebook	www.yellowpages.com www.local.yahoo.com
	Charter / Intercity Buses	Use Greyhound, phonebook or Yahoo Local/Yellow Pages online	www.greyhound.com
	Rail Systems	Use Amtrak website	www.amtrak.com
	Regional & National Airports	Yahoo Local/Yellow Pages online or phonebook	www.yellowpages.com www.local.yahoo.com
Medical Services	Medicaid Transit Providers	The state broker for Illinois is First Transit. For approval go to their website or call 866-503-9040 or TTY 800-526-0844 - 8 a.m. to 5 p.m. M - F.	www.netspap.com
	County & City Health Departments	County Health Department or IL Department of Human Services websites	www.dhs.state.il.us/page.aspx?module=12
	Emergency Medical Transportation Providers	Note all public providers are automatically ADA certified. If looking for a specific medical van contact Department of Motor Vehicle (DMV) registration offices to see ADA certified providers.	www.cyberdriveillinois.com/
	Air Medical Service Providers	If looking for specific provider of a rural area go to Association of Air Medical Services (AAMS) or Atlas & Database of Medical Services (AD/AMS) websites.	www.aams.org/AAMS/About_AAMS/Online_Member_Directories/ www.adamsairmed.org/public_site.html
	Doctors Offices & Clinics / Dental Offices	Check with County Health Department representatives as they are familiar with common locations, or check phonebook and Yahoo Local/Yellow Pages online.	www.yellowpages.com www.local.yahoo.com
	Area Hospitals	American Hospital Directory local listings website	www.ahd.com
	Mental Health & Counseling Offices / Rehabilitation Centers	County Health Department or IL Department of Human Services websites	www.dhs.state.il.us/page.aspx?module=12
	Psychiatric Hospitals	IL Department of Human Services office locator website	www.dhs.state.il.us/page.aspx?module=12
	Substance Abuse Treatment Centers	Substance Abuse Treatment Facility Locator website, search by address	http://findtreatment.samhsa.gov/TreatmentLocator/faces/quickSearch.jspx
	American Red Cross Centers	Call County Health Department or check their service directory website, and/or check phonebook and Yahoo Local/Yellow Pages online	www.redcross.org/where
Seniors	Adult Day Services	Search by county on IL Department on Aging website or call: 800-447-4278 or TTY 888-206-1327	www.state.il.us/aging/1directory/directory-main.htm www.state.il.us/aging/2aaa/aaa_map.htm
	Nutrition Programs (Meals on Wheels)		
	Area Agencies on Aging Offices & Programs		
	In-Home Service Offices & Programs		

Table 21 highlights the groups of stakeholders that are most likely to contribute valuable information and insight into setting goals for your transit system. These stakeholders may be engaged through interviews, focus groups, surveys/questionnaires, working groups, advisory groups, steering committees and formal committees.

Rural Transit Performance Measures, Goals, and Objectives

Performance measures, goals, and objectives for rural transit usually include the following (goals in blue and objectives in grey). However, it is recommended that objectives should be given a quantifyable increment for increasing or reducing and a time frame for accomplishment.

1. Improve/maintain efficiency and effectiveness
   a. Reduce expenses
   b. Reduce deadhead miles
   c. Reduce deadhead hours
   d. Increase ridership
2. Improve or maintain service quality
   a. Increase on-time performance percentage
   b. Reduce response time
   c. Increase the availability of service (hours and days)
   d. Reduce trip denial percentage
   e. Increase revenue
3. Improve or maintain safety and security
   a. Reduce or eliminate accidents and crimes
   b. Reduce or eliminate positive drug and alcohol tests

Table 21 | **Stakeholder Group Perspective and Insight into Setting Goals**

Stakeholder Group	Target Groups, Insight and Perspective
Public Transit	Public transit operator provides perspective and insight into challenges facing transit in your community. Challenges maybe related to service certain neighborhoods or community, certain population groups and even trip types.
Private Transportation	Private providers usually meet transportation needs when transit is either unavailable or impractical. Utilizing these providers can be cost prohibitive for some groups and therefore they may provide insight into the needs of affordable transportation options.
Seniors	Seniors
Persons with Disabilities	Persons with disabilities
Religious Community Groups	Religious groups typically work with vulnerable groups in the community: most frequently youth, older adults, persons with disabilities and persons with low income. These religious groups can provide insight into the needs of the groups; they also provide special programs geared towards these groups that may require special program transportation.
Youth and Families	Youth
Community Service Agencies and Volunteer Groups	Community service and volunteer groups typically work with vulnerable groups such as low income persons, persons with disabilities, older adults, and youth, all of whom are classified as transi-dependent.
Housing	Housing agencies typically work with low income persons.
Veterans	The share of veterans with severe disabilities has been steadily increasing since 2000, and a significant number of veterans are older adults.
Employment	Employment stakeholders typically work with low income persons.

c. Reduce or eliminate employee work days lost to injury
d. Reduce or eliminate the number of traffic tickets issued to drivers
e. Increase the number of vehicles with safety equipment

4. Improve or maintain rider satisfaction
   a. Increase the customer satisfaction rating for the following:
      i. Fare
      ii. Customer service
      iii. Frequency (if applicable)
      iv. Passenger assistance
      v. Scheduling procedures
      vi. Hours
      vii. Service areas
      viii. Perceptions of safety and security

Is your objective SMART?

- **Specific** – is the desired outcome clearly written?

- **Measurable** – can it be measured quantitatively and evaluated?

- **Agreed** – was there consensus among partners?

- **Realistic** – can it reasonably be accomplished?

- **Time-Bound** – did you set a timeframe to complete performance?

By creating specific, measurable objectives, regions can use these objectives for making investment decisions as well as tracking progress. An objective should have the SMART characteristics defined below:

- **Specific.** The objective provides sufficient specificity (e.g., decrease travel time delay) to guide formulating viable approaches to achieving the objective without dictating the approach.

- **Measurable.** The objective facilitates quantitative evaluation (e.g., by 10 percent), saying how many or how much should be accomplished. Tracking progress against the objective enables an assessment of the effectiveness of an action or set of actions.

- **Agreed.** Planners, operators, and relevant planning participants come to a consensus on a common objective. This is most effective when the planning process involves a wide range of stakeholders to facilitate regional collaboration and coordination.

- **Realistic.** The objective can reasonably be accomplished within the limitations of resources and other demands. The objective may require substantial coordination, collaboration, and investment to achieve. Because determining the realism of the objective cannot occur until after strategies and costs are defined, the objective may need to be adjusted to be achievable.

- **Time-Bound.** The objective identifies a timeframe within which it will be achieved (e.g., within 5 years). By selecting a performance target as part of the operations objective, regions make decisions knowing the degree of improvement they are striving for rather than just the direction of improvement. For example, the objective of "decrease travel time delay" conveys direction ("decrease") but does not indicate the desired degree of improvement. The objective "decrease travel time delay by 10 percent within 5 years" gives the region a specific and measurable target to reach.

2.4 ACHIEVING GOALS AND OBJECTIVES

Once you have selected your goals and objectives for your selected performance measures, utilize Table 22 to identify the contributing factors for the various inputs. Each of these inputs have a number of factors that influence their outcome, and the transit operator has varying levels of control over each factor. It is best to devise strategies for factors that you have partial to full control over.

Strategies are the methods used to achieve the objectives set in section 2.3. You will need to devise strategies that will affect the factors that you have full or partial control over. Table 23 identifies possible strategies that can be implemented to achieve your goals and objectives.

MY TRIP Tools as Strategies

The following four tools from the MY TRIP Phase I Toolkit can be utilized as strategies to improve performance measures:

- The Marketing and Outreach Tool can be utilized to improve effectiveness and efficiency by increasing ridership;

- The Rural Travel Training Tool can be utilized to improve effectiveness and efficiency by increasing ridership;

- The Stakeholder Contact Tool can be utilized to improve local match revenue by building relationships with human service agencies and major employers; and

- The Rider and Non-Rider Survey Tool can be utilized to improve rider satisfaction.

Table 22 | **Inputs of Performance Measures, Factors and Level of Control**

Inputs of Performance Measures	Factor	Level of Control
Ridership	Weather	None
	Passenger Assistance	Full
	Eligibility	Partial
	Scheduling and Dispatch	Full
	Marketing	Partial
	Dwell Time	Full
	No Shows and Cancellation	Full
	Advance Reservation Period	Full
	Seating Capacity	Partial
Actual Hours	Service Hours and Days	Partial
	Dwell Time	Full
	Deadhead Hours	Partial
	Passenger Assistance	Full
	Service Area Size, Density and Land Use	None
Actual Miles	Deadhead Miles	Partial
	Scheduling and Dispatch	Full
	Service Area Size, Density and Land Use	None
Expenses	Salaries, Wages and Benefits	Full
	Marketing	Full
	Maintenance	Partial
	Fuel Consumption	Partial
	Office Supplies	Full
	Utilities	Partial
	Deadhead Miles	Partial
	Deadhead Hours	Partial
Revenue	Federal Grants	Partial
	State Grants	Partial
	Private Grants	Partial
	Local Match Revenue	Full
	Farebox Revenue	Partial

Efficiency and Effectiveness

Inputs of Performance Measures	Factor	Level of Control
On-Time Performance	Traffic and Road Conditions	None
	Timely Pull Outs	Full
	Scheduling and Dispatch	Full
	Weather	None
Response Time	Demand	Full
	Capacity	Full
	Response Time Policy	Full
	Service Area Size, Density and land Use	Partial
Service Hours and Days	Funding*	Partial
	Demand	Partial
Denials	Scheduling and Dispatch	Full
	Service Hours and Days	Partial
	Funding	Partial
	Capacity	Partial
Accidents, Crimes and Employee Work Days Lost to Injury	Safety Policy, Training and Procedures	Full
Traffic Tickets and Positive Drug and Alcohol Tests	Driver Training	Full
	Hiring and Termination Procedures	Full
	Drug and Alcohol Testing Procedures	Full
Rider Satisfaction	Affordability	Partial
	Customer Service	Full
	Frequency (if applicable)	Partial
	Passenger Assistance	Full
	Scheduling Procedures	Full
	Service Days and Hours	Partial
	Routes (routes)	Full
	Perceptions of Safety and Security**	Full

Service Quality (spanning On-Time Performance through Denials)
Safety and Security (spanning Accidents, Crimes... through Traffic Tickets...)
Rider Satisfaction (spanning Rider Satisfaction)

*See revenue factors
**See safety and security factors

Table 23 | **Strategies for Improving Performance Measures**

Factor	Strategies	Possible Outcomes
Capacity	Increase the number of vehicles	• Increases in operating expenses • Increase capacity
	Obtain larger vehicles	• Decrease fuel economy • Increase capacity
Passenger Assistance*	Increase the level of passenger assistance	• Increase ridership from persons requiring more assistance • Decrease ridership from spending more time on each individual passenger
	Decrease the level of passenger assistance	• Increase ridership by spending less time on each individual rider • Decrease ridership by excluding passengers that require more assistance
Eligibility	Relax eligibility requirements and make more groups of people eligible for service	• Increase ridership
Scheduling and Dispatch	Utilize Computer Aided Scheduling and Dispatch software	• Increase ridership • Decrease mileage and hours from improve efficiency in scheduling and dispatch
Marketing	Devise a marketing campaign to effectively market to as many eligible groups as possible	• Increase efficiency and effectiveness from increase in ridership • Decrease efficiency from increased operating expenses
	Implement a Rural Travel Training Program	• Increase efficiency and effectiveness from increase in ridership due to more persons being familiar with how to utilize the transit service • Decrease efficiency from increased operating expenses
Dwell Time	Reduce dwell time	• Decrease hours • Increase effectiveness and efficiency from ridership increase due to more hours spent providing service instead of waiting on individual passengers
No Shows and Cancellation	Adopt and enforce a no show/late cancellation policy	• Increase ridership
Advance Reservation Period	Reduce advance reservation period	• Increase ridership due to higher level of convenience for the rider

Factor	Strategies	Possible Outocmes
Service hours and days	Increase the service hours and days for the service	• Increase ridership • Decrease efficiency from increased cost, miles and hours
Deadhead hours/miles	Utilize satellite parking areas for vehicles	• Increased efficiency from decrease in deadhead miles and hours
	Provide scheduled service for frequent destinations	• Increased effectiveness and efficiency from decrease in deadhead miles and hours
Salaries, Wages and Benefits	Increase salaries, wages and benefits	• Decrease efficiency from increased costs • More skilled and stable employees who could improve productivity, safety and efficiency
	Reduce salaries wages and benefits	• Increase efficiency from reduced costs • Lower productivity from less skilled and unreliable staff and high turnover rate
	Utilize volunteer staff	• Lower productivity from unreliable staff • Increase efficiency from reduced costs
	Use part time staff where possible	• Increase efficiency due to cost savings from not needing to pay fringe benefits.
Maintenance	Perform regularly scheduled maintenance	• Increased efficiency from cost savings due to extended useful life of vehicle and fewer major repairs
Fuel	Utilize fuel-efficient vehicles	• Increased efficiency from cost savings due to more miles per gallon
	Utilize Computer Aided Scheduling and Dispatch	• Increased efficiency from cost savings due to being able to provide more trips with less miles and hours (fuel)
Office Supplies	Go paperless for employee, maintenance and other administrative and operations records	• Increased efficiency from cost savings due to reduced use of paper
Utilities	Install energy and water conservation technology in facilities	• Increased efficiency from cost savings due to utilizing less energy and water.
Federal, State and Private Cash Grants	Demonstrate an increase in demand for transit in your service area as part of your grant application	• Improved service from increased funding

Factor	Strategies	Possible Outocmes
Local Match	Get involved in the community, build relationships with human service agencies and major employers to increase opportunities for service contracts or route sponsorship	• Improved service from increased funding • Improved access to more federal and state grant funds through higher local match
	Sell advertisement on buses	
Farebox	Increase ridership**	• Increased farebox, which provides more funding for improving service • Less reliance on unpredictable grant and service contract funds
	Raise fares	• Increased farebox, which provides more funding for improving service • Decreased farebox from ridership decrease due to unaffordability
Timely Pull-Outs	Start driver shifts a half an hour before the scheduled pullout time	• Improved on-time performance • Slightly longer shifts, which increases operating costs
	Have a maximum allowed number of late pull-outs per per driver per quarter	• Improved on-time performance • Possible increase in vehicle inspection errors
Safety Training and Procedures	Establish comprehensive vehicle operator training program	• Decrease in accidents and crimes • Decrease in liability and insurance costs • Improved efficiency from a decrease in costs
	Monitor incident and accident trends	
	Involve staff from all departments in a safety committee	
	Reward safe operators	
	Establish policies/procedures for bad weather operations	
	Establish strict criteria for safe driving records for new and current drivers	
	Conduct random drug and alcohol testing regularly	
	Install cameras on buses and stops	
Rider Satisfaction	Establish complaint procedures	• Increased ridership, farebox, effectiveness, and efficiency
	Conduct rider satisfaction surveys regularly	
	Establish methods for rider suggestions	

*You need to ascertain what percentage of existing riders requires each level of passenger assistance to determine if increase or decreasing the level of the passenger assistance is best for your system.
** Please see factors and strategies with increased ridership as an outcome.

MARKETING AND OUTREACH TOOL

Marketing and outreach is a vital step to ensure the success of transit service. Your target population must be made aware of the existence of your service, the type of service provided, and any eligibility requirements. Some components of marketing include community outreach, branding, rider information and awareness, media advertising, and customer service.

What is the Marketing and Outreach Tool?

The Marketing and Outreach Tool from MY TRIP Phase I Toolkit, shown in Figure 19 and available at http://ecihstp.cuuats. org/my-trip/marketing-and-outreach-tools-overview/, outlines a number of strategies utilized to achieve public awareness for rural transportation. Each strategy has a number of activities as part of the overall strategy. The five main marketing strategies are:

- Community Outreach;
- Branding;
- Rider Information and Awareness;
- Media Advertising; and
- Customer Service.

How to Use the Marketing and Outreach Tool?

Depending on your unique situation and funding source (Section 5311 vs. Section 5310, Table 24), the applicability of marketing activities vary. Section 5311 as described in the Funding Chapter in Scenario 1: Creating A Nonprofit to Provide Rural Transportation is for general public transportation, which means this type of service needs to be marketed to all population groups and for all trip types. Section 5310 funding is designed specifically for persons with disabilities; therefore, the marketing for Section 5310 will not be as extensive and comprehensive as Section 5311.

Figure 19 | **Marketing and Outreach Tool**

Marketing and Outreach Tool

Marketing Plan Checklist Guide

A public transit system's primary goal should always involve a customer centered approach that addresses the community's needs; therefore, a public transit system must inform the community of what their services are and the benefits they offer to meet those needs. To accomplish this and to gain buy-in, a public transit system must produce, implement, and evaluate a marketing plan.

A marketing plan does not need to be complex. However, it should contain the following parts: marketing objectives; activities with action steps to meet those objectives; a timeline for implementation; a budget; and a method to evaluate marketing effectiveness.

Before work on a marketing plan begins, clearly establish roles for everyone involved. This guarantees that marketing responsibilities will not fall onto a single person. Directors, staff, and any boards that are developed should be included in the marketing process. Those chosen for such positions must be persistent and have strong leadership skills.

Table 24 **Section 5311 vs. Section 5310**

Service-Area Type	Section 5311			Section 5310	
	Strongly Recommended	Recommended	Optional	Strongly Recommended	Recommended
Community Outreach					
Develop local advisory boards	•			•	
Create community feedback forums	•				
Publish newsletter			•		
Participate in community events		•			
Develop a travel training program		•			•
Participate in targeted outreach		•		•	
Branding					
Develop or enhance image	•			•	
Actively manage your image			N/A	N/A	N/A
Rider Information and Awareness					
Develop a rider mobility guide	•			•	
Develop a website	•				•
Utilize social media			•		•
Media Advertising					
Embark on a testimonial campaign			•		•
Participate in public speaking events			•		•
Maintain strong media and public relations		•			•
Advertise public transit system	•				•
Customer Service					
Market internally		•			•
Administer rider and non-rider surveys	•				•
Develop a customer feedback system	•				•

A limited number of Section 5310 vehicles are usually awarded to non-profits that serve persons with disabilities and older adults (older adults are often mobility challenged). These entities are usually nursing homes and assisted living facilities that typically utilize vehicles to provide transportation for their clients. It is not feasible or practical to advertise Section 5310 service to a wider audience due to both its limited scope and limited capacity. Table 22 lists the marketing activities from the MY TRIP Phase I project and details their applicability based on the funding source.

The marketing activities can also be prioritized by time frame. Activities that are strongly recommended are best completed within the first two years of establishing the transit system, recommended activities between years three and five and optional activities after five years.

RURAL TRAVEL TRAINING TOOL

What is the Travel Training Tool?

Rural travel trainings are training sessions that teach persons firsthand how to take public transportation. They can also be in the format of "Train the Trainer", where persons, usually mobility managers and transit employees, are taught the most effective methods for teaching various groups how to utilize transit systems. The Rural Travel Training Tool from the MY TRIP Phase I toolkit, which is shown in Figure 20 and is available at http://ecihstp. cuuats.org/my-trip/rural-travel-training-documents/, goes into detail about training both novice riders and future travel trainers. The Rural Travel Training Tool outlines the three step process for conducting travel training: planning, presenting, and follow-up.

Identifying Persons who Need Travel Training

The stakeholder contact tool and the targeted outreach activities from the Marketing and Outreach tool can be utilized to identify potential riders who may be interested in partaking in rural travel trainings. If your potential service is geared towards the general public, you will want to contact stakeholders that represent the interests of each transit-

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Figure 20 | **Rural Travel Training Tool**

Rural Travel Training Tool

3 Steps for a Successful Rural Travel Training (RTT)

Step 1: RTT Planning

1. Review RTT Curriculum
2. Contact your HSTP coordinator to assist with first few RTTs
3. Select two 5311 staff (with good communication skills) to co-facilitate the RTT:
    • Administrative: good understanding of policies and procedures, such as transit director, manager, or marketing person
    • Front Line: works directly with riders such as a driver or dispatcher
4. Determine who you want to give an RTT to
5. Pull this group together using:

dependent group. If you are interested in providing specialized transportation, such as Section 5310 (persons with disabilities), you can contact stakeholders that represent persons with disabilities and older adults, since older adults also have a high incidence of physical immobility. These stakeholders can connect you with potential consumers of your transit service.

When to Conduct Travel Training?

In the case of establishing new service in rural areas, it is strongly recommended that you conduct travel trainings for potential riders either just before the official start of the service or at the beginning of service. It is important to conduct "Train the Trainer" travel trainings far enough in advance (at least one month) of the commencement of service to give future trainers ample time to feel comfortable with both the training material and working with the public. For both new and established services, operators should continue conducting travel trainings at regularly scheduled intervals, such as quarterly, to ensure all new potential riders are familiar with how to use your service.

RIDER AND NON-RIDER SURVEY TOOL

Rider feedback is essential to ascertaining whether or not existing levels of service satisfactorily meet the needs of your riders. It is also required by IDOT to perform satisfaction surveys annually as part of the Section 5311 grant application. If your ridership numbers are unsatisfactory, you may want to consider conducting a non-rider survey in your service area as well to gain insight as to why potential riders do not utilize your provided service.

The Rider Survey Tool from the My Trip Phase I Toolkit, shown on Figure 21 and available at http://ecihstp.cuuats.org/rider-survey/, is a brief survey designed to obtain information about travel behavior, satisfaction with the service, and efficacy of your marketing strategies. The final page of the survey, the demographic survey page, although optional is highly recommended. It is also important for the provider to state on the survey that filling out the demographic sections of the survey is optional.

Figure 21 | **Sample Rider Survey**

Rider Survey

This is a short two page survey about how Click here to enter Transit System. *is serving its riders. For multiple choice questions below (a,b,c) please circle all that apply. Thank you for taking the time to provide your feedback!*

1. **Where in** Click here to enter Service Area.**do you live?**

    _____

2. **Where do you typically ride to/from**

c. Advance reservation timeframe
d. Need someone to ride with me
e. Personal health reasons / disability
f. There are no obstacles
g. Other:

Demographic data allows the provider to compare the demographic makeup of their riders to the demographic makeup of the community. For example, if your service area is 30% low income and 12% senior but your ridership makeup is 10% low income and 45% older adults, this could indicate inequality in marketing and outreach and that strengthening marketing to underrepresented groups should be a priority. This is especially important for Section 5311 grantees that have to prove that their service is marketed as general public transportation and not specialized program transportation.

The Non-Rider Survey Tool, shown in image 22 and available at http://ecihstp.cuuats.org/

non-rider-survey/, is a two-page survey that allows you to obtain information from non-riders about travel behavior. It also includes an optional demographic section. This will allow you to understand if your marketing strategies are effective, if your service quality is high enough to draw choice riders, and whether or not there are certain deficits in your service.

STAKEHOLDER CONTACT TOOL

The Stakeholder Contact Tool is described in section 2.3.

Figure 22 | **Non-Rider Survey**
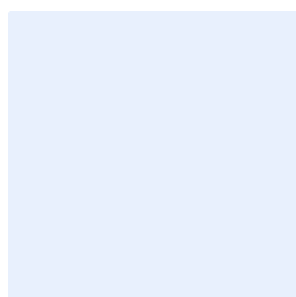
Non-Rider Survey

This is a short two page survey about how Click here to enter Transit System. *is serving its riders. For multiple choice questions below (a,b,c) please circle all that apply. Thank you for taking the time to provide your feedback!*

1. **Have you ever heard of** Click here to enter Transit System**?**
   a. Yes
   b. No
   c. If yes, where did you hear about it?
      i. Group presentations
      ii. Phone calls
      iii. Television or radio announcements
      iv. Public meetings
      v. Family or friends
      vi. School
      vii. Click here to enter Transit

4. **If you have used our service, what improvements would you recommend?**
   a. Later service hours
   b. Earlier service hours
   c. Weekend service
   d. More frequency
   e. Cheaper fare
   f. Other: _____

5. **What mode(s) of transportation do you use? (Circle all that apply)**
   a. Drive myself
   b. Carpool

2.5 TRACKING PROGRESS

The final step in improving rural transit performance is to track your progress. This will allow you to evaluate the efficacy of the strategies employed to achieve the set objectives. The simplest way to track progress is to conduct a progress report at regularly scheduled intervals, ranging from annually to triennially. Table 25 shows a sample progress report for two different performance measures, where one objective was accomplished while the other was not.

Table 25 **Sample Performance Measure Progress Report**

Date of Progress Report: 3/2015		
Performance Measure	Cost/ Trip	On Time Performance
Baseline Measure	$19.12	LOS 7 (70-74.9%)
Date of Baseline	12/2012	12/2012
Objective	$13.36	LOS 3 (90-94.9%)
Target Date	12/2014	12/2013
Current Measure	$17.22	LOS 3 (92.2%)
Achieved	No	Yes
Responsible Parties	Operations manager and Transit Director	Operations Manager
Reason(s) for Non-Attainment	High Deductible payments for 3 vehicular accidents last year Increase in Insurance premiums from 3 accidents Legal fees from accident lawsuits	
Adjustments Moving Forward	Hire a safety manager to work with Operations Manager and Transit Director to devise strategies to reduce crime and accidents.	
New Objective	$14.50	LOS 2 (95-97.4%)
New Target Date	12/2016	12/2015

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APPENDICES

Stakeholder Contact Tool

Introduction - Stakeholder Contact Tool

A stakeholder can be a person, group, organization, government agency, or outside public transit system impacted by or potentially being impacted by your transit system's services. The Stakeholder Contact Tool is for someone acting as a mobility manager to identify, expand on, and determine how to use stakeholder's input when coordinating, conducting outreach, marketing, or gaining community involvement in your system.

Current Stakeholder Coordination in Illinois

In Illinois, several efforts are underway with coordination meetings at varying levels:

- Statewide with Interagency Coordinating Committee on Transportation (ICCT) and Illinois Department of Transportation (IDOT)
- Regionally with Human Service Transportation Plan (HSTP) Regions and Coordinators
- Locally with transportation providers, public government entities, human service providers, and businesses etc.
- Typically coordination is within a county or service area, however rural communities may have human service agencies located outside and covering multiple counties. Therefore, it is not unusual to have coordination in one county provided by agencies in multiple counties.
- ICCT Clearinghouse has worked across the state with counties and established Transit Partnership Groups comprised of a broad range of local stakeholders.
- Additionally, some counties have long-standing human service interagency meetings that meet monthly.

How to Find Stakeholders covers:

Stakeholder Groups (Outlined in Yellow) - These are the common fields in every community that contain mobility needs and resources. To truly focus on riders, you will want to include and represent as many stakeholder groups as possible.

Stakeholder Agencies (Outlined in Blue) - These are organizations under different Stakeholder Groups, feel free to add any additional agencies to the end of the sheets.

How to Find Stakeholders in Your County (Outlined in Red) - This is divided into two sections: Where to look for stakeholders and Possible Websites with a directory or information on local/regional agencies.

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How to Find Stakeholders

Stakeholder Groups	Stakeholder Agencies	How to Find Stakeholders in Your County — Where To Look:	Possible Websites:
Public Transit	Local Public Transit Systems	Tranpro Statewide Public Provider directory website to search by county, or check phonebook, or Yahoo Local/Yellow Pages online. Make sure to include both Urban and Rural providers in the surround area.	www.utc.uic.edu/tranpro/clickmap.php
	Regional Coordinators	Tranpro Statewide Public Provider directory website to search by region for IL Human Service Transportation Plan (HSTP) Coordinators	www.utc.uic.edu/tranpro/clickmap.php
	IDOT Staff	IL Department of Transportation (IDOT) website's Division of Public and Intermodal Transportation (DPIT), right-hand side has specific programs and contacts listed	www.dot.il.gov/dpit/index.html
Private Transportation	Taxi Companies / Private Shuttles	Yahoo Local/Yellow Pages online or phonebook	www.yellowpages.com www.local.yahoo.com
	Charter / Intercity Buses	Use Greyhound, phonebook or Yahoo Local/Yellow Pages online	www.greyhound.com
	Rail Systems	Use Amtrak website	www.amtrak.com
	Regional & National Airports	Yahoo Local/Yellow Pages online or phonebook	www.yellowpages.com www.local.yahoo.com
Medical Services	Medicaid Transit Providers	The state broker for Illinois is First Transit. For approval go to their website or call 866-503-9040 or TTY 800-526-0844 - 8 a.m. to 5 p.m. M - F.	www.netspap.com
	County & City Health Departments	County Health Department or IL Department of Human Services websites	www.dhs.state.il.us/page.aspx?module=12
	Emergency Medical Transportation Providers	Note all public providers are automatically ADA certified. If looking for a specific medical van contact Department of Motor Vehicle (DMV) registration offices to see ADA certified providers.	www.cyberdriveillinois.com/contact/contact.html
	Air Medical Service	If looking for specific provider of a rural area go to	www.aams.org/AAMS/About_AAMS/Onlin

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Stakeholder Groups	Stakeholder Agencies	How to Find Stakeholders in Your County	
		Where To Look:	Possible Websites:
	Providers	Association of Air Medical Services (AAMS) or Atlas & Database of Medical Services (ADAMS) websites.	e_Member_Directories/AAMS/AboutAAMS/OnlineMemberDirectories/Online_Member_Direct.aspx?hkey=f8a57507-582d-475f-b7f8-b64577a2786b www.adamsairmed.org/public_site.html
	Doctor's Offices & Clinics / Dental Offices	Check with County Health Department representatives as they are familiar with common locations, or check phonebook and Yahoo Local/Yellow Pages online.	www.yellowpages.com www.local.yahoo.com
	Area Hospitals	American Hospital Directory local listings website	www.ahd.com
	Mental Health & Counseling Offices / Rehabilitation Centers	County Health Department or IL Department of Human Services websites	www.dhs.state.il.us/page.aspx?module=12
	Psychiatric Hospitals	IL Department of Human Services office locator website	www.dhs.state.il.us/page.aspx?module=12
	Substance Abuse Treatment Centers	Substance Abuse Treatment Facility Locator website, search by address	http://findtreatment.samhsa.gov/TreatmentLocator/faces/quickSearch.jspx
	American Red Cross Centers	Call County Health Department or check their service directory website, and/or check phonebook and Yahoo Local/Yellow Pages online	www.redcross.org/where
Seniors	Adult Day Services Nutrition Programs (Meals on Wheels) Area Agencies on Aging Offices & Programs In-Home Service Offices & Programs Elder Abuse Agencies	Search by county on IL Department on Aging website or call: 800-447-4278 or TTY 888-206-1327	www.state.il.us/aging/1directory/directory-main.htm www.state.il.us/aging/2aaa/aaa_map.htm
	Retirement and Civic Centers	Retirenet.com for IL Directory for Retirement Communities. Note many nursing homes are private;	www.retirenet.com/location/overview/65-illinois

Stakeholder Groups	Stakeholder Agencies	How to Find Stakeholders in Your County — Where To Look:	Possible Websites:
		there are not many extensive directories. This is easier to navigate than the Eldercare Locator.	www.n4a.org/programs/eldercare-locator
	Nursing Homes / Hospice Care Programs	Aging Services Network Eldercare website or call 800-677-1116	www.n4a.org/programs/eldercare-locator
	Centers for Independent Living (CIL)	IL CIL Network website	www.incil.org/locations.asp
People with Disabilities	Easter Seals of Illinois Offices & Programs	Assistance for education of all children with disabilities, find local office on office locator website	www.easterseals.com/site/PageServer?pagename=Advanced_Affiliate_Search
	Area of Special Education Offices; Developmental Disabilities Centers & Programs; Department of Rehabilitative Services; Residential Schools; Local Human Resource Centers (HRC)	IL Department of Human Services office locator website. Note that for DRS offices, look under Rehabilitation Services; and that the website will list any educational rehabilitation sites and/or schools for the Deaf or Visually Impaired. Additionally, check with the county Health Department. Please note that many disability programs require a state waiver from the Regional IL DRS's office for clients to qualify for services.	www.dhs.state.il.us/page.aspx?module=1 2
	Developmental / Rehabilitation Centers	County Health Department or IL Department of Human Services website	www.dhs.state.il.us/page.aspx?module=1 2
Religious Community Groups	Faith In Action Programs	Faith in Action national website to find a program in area, or contact religious leaders directly	www.fianationalnetwork.org/find-fia-program.cfm
	Religious Social Service Agencies	Check with Community Action Agency for programs in area, or contact religious leaders directly	www.iacaanet.org/arra_at_work.php
	Churches / Mosques / Synagogues / Etc.	IL Christian Churches Directory, IL Local Guides.com (search by state), and/or Yahoo Local/Yellow Pages websites to find all churches mosques and/or synagogues. Check local community directory to make sure the list has up-to-date contact information.	www.churchangel.com/illinois.htm www.localguides.com/index.html www.yellowbook.com
Government	County Government	Check county's website, if they exist they will be listed	www.state.il.us/court/probation/default.as

Stakeholder Groups	Stakeholder Agencies	How to Find Stakeholders in Your County	
		Where To Look:	Possible Websites:
Agencies, Staff, & Elected Officials	Buildings	on IL Courts website which you can search by county (left hand side bar). Make sure to get a copy of the county board meetings and subcommittees.	p
	Federal Representatives	IL Board of Elections' District/Official Search (by district, official, address, or zip) for federal and state level positions; note election cycles and transit subcommittees	www.elections.illinois.gov/DistrictLocator/DistrictOfficialSearchByAddress.aspx
	State Representatives		
	County Representatives	Check county's website (IL Courts website on left hand side), or check local libraries or newspapers. Take note of election cycles and transit subcommittees.	www.state.il.us/court/probation/default.asp www.publiclibraries.com/illinois.htm
	Township Representatives	To find municipalities (villages, towns, cities) and local governments go to Census website. Note election cycles in order to keep up to date contacts. Also, IL Township Officials website has an interactive map for townships for quick county reference.	www2.illinois.gov/census/Pages/Census2010Data.aspx www.toi.org/CountyTownships.asp
	Regional Planning Commissions / Council of Governments / Metropolitan Planning Organizations	All of Illinois is covered by one of these planning organizations. Check planning organization websites.	http://www.ilarconline.org/ www.ilmpo.org/About_Us.html
Justice	State or County Attorney	IL Attorney General website; for county Attorney General check county's website or call courthouse	www.illinoisattorneygeneral.gov
	Legal Aid Programs	Check on local TASC (Treatment Alternatives for Safe Communities) services or statewide Land of Lincoln Legal Assistance	www.tasc-il.org/preview/progbyarea.html www.lollaf.org
	Domestic Violence Centers	Check courthouse or County Health Department website	www.isp.state.il.us/contacts/contacts.cfm
	Court & Probation Services	Check county's website (IL Courts directory on left hand side) and/or sheriff's office, typically all court	www.state.il.us/court/probation/default.asp

How to Find Stakeholders in Your County

Stakeholder Groups	Stakeholder Agencies	Where To Look:	Possible Websites:
	State & Local Law Enforcement Agencies	IL State Police website to find local Highway Patrol branch, check county, city, or court websites to find local law enforcement agency and probation services are conducted by local sheriff's office. For federal probation, check regional website	www.isp.state.il.us/contacts/contacts.cfm www.ilsd.uscourts.gov/USPO/CourtRelatedSites.html
	Local & Federal Prisons	Check Federal Bureau of Prisons' or county's websites	www.bop.gov/locations/maps/NCR.jsp
Families & Youth	Division of Child & Family Services (DCFS)	DCFS directory website for regional offices	www.state.il.us/DCFS/phoneDirectory.shtml
	Family Violence Prevention Centers	DHS IL Violence Prevention Resource List website	www.dhs.state.il.us/page.aspx?item=352 18
	Foster Parent Agencies	DCFS website for foster care, there is an additional link to training schedule and other details. Programs fall under DCFS	www.state.il.us/dcfs/foster/index.shtml
	Division of Child Support Enforcement	Child support services regional offices website	www.childsupportillinois.com/customers/office.html
	Juvenile Court & Probation Services / Youth Detention Centers	TASC programs website, look for specific area by county. Typically programs are operated through court services and non-profits, includes drug court, probation, detention, and rehabilitation	www.tasc-il.org/preview/progbyarea.html
	Family Case Management Offices / Family Resource Centers	County Health Department or IL Department of Human Services website.	www.dhs.state.il.us/page.aspx?module=12
	State Developmental Centers	IL Department of Human Services office locator website	www.dhs.state.il.us/page.aspx?module=12
Community Service Agencies & Volunteer	Food Pantries	County Health Department or IL Department of Human Services website	www.dhs.state.il.us/page.aspx?module=12
	Homeless Shelters	IL Homeless Shelters and Soup Kitchens Directory (only starting point, need to check with local groups as program funding is inconsistent)	www.homelessshelterdirectory.org/illinois.html

Stakeholder Groups	Stakeholder Agencies	How to Find Stakeholders in Your County	
		Where To Look:	Possible Websites:
Groups	Community Action Agencies & Programs	IL Association of Community Action Agencies' map website	http://iacaanet.org/arra_at_work.php
	United Way	United Way of IL website or call 211 to locate branches	www.unitedwayillinois.org/find/find.php
	YMCA/YWCA Offices & Programs	National YMCA website to search by zip code (Commonly known in the community)	www.ymca.net
	Retired & Senior Volunteer Program	IL Senior Corps website for all Retired & Senior Volunteer Program (RSVP) programs	www.seniorcorps.gov/about/programs/rsvp.asp
	4-H Club Programs	Groups are headed by University of Illinois Extension Offices; find local branches on website	www.4-h.org/get-involved/find-4-h-clubs-camps-programs
	Other Community Service Groups	Check public forums, newspapers, libraries, and religious groups to find local volunteer groups	
	Community Leaders	Check newspapers and board memberships of local organizations, many times the same people will sit on numerous boards and hold leadership roles across numerous service organizations	
	Salvation Army Offices	National Salvation Army website for local branches	www.salvationarmyusa.org
	Illinois Municipal League	Check for regional contacts by visiting the website or calling 217-525-1220	http://www.iml.org/
Housing	County Housing Authority Offices	IL Housing Development Authority website, at bottom of the page, then select "Public Housing Authorities" tab to search county	www.ihda.org/Map.aspx
Veterans	Regional Veterans Affairs (VA) Offices	IL Department of Veterans Affairs' Google Map, see link in column (home: www.veterans.illinois.gov/programs) or call 312-814-2460. For a list of VA Hospitals and Healthcare Centers go to U.S. Department of Veterans Affairs' website	www2.va.gov/directory/guide/division_flsh_asp?dnum=1
	Veterans of Foreign Wars (VFW) Local Offices, Branches, or American Legions		maps.google.com/maps/ms?ie=UTF8&hl=en&msa=0&msid=103591904087477906918.00046209f7e7827b062e2&ll=40.245992,-89.362793&spn=13.088506,33.72802

Stakeholder Groups	Stakeholder Agencies	How to Find Stakeholders in Your County — Where To Look:	Possible Websites:
Education	Veterans' Employment & Training Services	US Department of Labor or IL Job Seeker workshop listing websites	7&z=6, www.dol.gov/vets/welcome.html, www.ides.state.il.us/db/JobWorkshops/default.asp
	Veterans Assistance Commission (VAC)	The Illinois Association of Veterans Assistance Commissions provides a catalog of contacts providing assistance for veterans. Additionally, a good contact for community volunteers as well	www.iacvac.org/Index.html
	Pre-Schools	IL Board of Education website with Excel sheets of pre-schools for kids 5 years old and younger	www.isbe.net/earlychi/html/directories.htm
	Head Start Programs	ILHeadStart.org website under Locate Head Start.	www.ilheadstart.org/a2zlistings.html
	K-12 Private & Public Schools / School District Offices / Regional Office of Education	IL Board of Education website has Excel sheets of public and private school districts grades K-12	www.isbe.state.il.us/research/htmls/directories.htm, http://www.isbe.state.il.us/regionaloffices
	Colleges / Universities / Community Colleges	IL Government website, under colleges and universities, check to see if university-only transit	www2.illinois.gov/education/Pages/CollegesAndUniversities.aspx
	Libraries	IL Public Libraries website, which also covers all state, college, and local libraries. On the right side of the webpage you can search by county	www.publiclibraries.com/illinois.htm
	Literacy Groups	Literacy Information Directory website allows to search for programs locally. Additionally, IL has Secretary of Literacy website with reports that includes a directory on programs, registration for adult learners, or call their hotline 800-321-9511	www.literacydirectory.org, www.cyberdriveillinois.com/departments/library/who_we_are/literacy/home.html
	English as a Second Language (ESL) Programs	Check with local universities, colleges, training centers, and local schools for specific programs and classes offered. Additionally, for local adult programs check Literacy Information Directory website	www.literacydirectory.org
	University of Illinois	University Extension Office website to locate county	web.extension.illinois.edu/state/findoffice.

Stakeholder Groups	Stakeholder Agencies	How to Find Stakeholders in Your County	
		Where To Look:	Possible Websites:
Economic, Planning, & Development	Extension Offices	branches	html
	Charter Schools	Check Illinois Network of Charter Schools. Their website provides a catalog charter schools throughout the state of Illinois	www.incschools.org http://incschools.org/charters/find_a_charter_school/full_list
	Economic Development Corporations / Councils	IL Department of Commerce and Economic Opportunity (DCEO) website	www.commerce.state.il.us/dceo
	Convention & Visitors Bureau	Check county's website (IL Courts website on left side)	www.state.il.us/court/probation/default.asp
	Chambers of Commerce	IL Chamber of Commerce website	www.ilchamber.org/Illinois-Chamber-Of-Commerce/Main/Home.htm
	Farm Bureaus	IL Farm Bureau's county map website	www.ilfb.org/countymap.asp
Employment	Employment, Vocational Training, & Workforce Development Centers	IL Workforce Development System, IL Skills Match Job Search, or IL Job Seeker websites IL Department of Employment Security Office/Work Net Center website	www.iwds.state.il.us www.ides.state.il.us/db/JobWorkshops/default.asp
	Unemployment Offices	Illinois Department of Employment Security's website allows the visitor to search for unemployment offices by zip code, or call their hotline 800-244-5631 or TTY 866-322-8357	www.ides.state.il.us/worknet/default.asp
	Temp Agencies	Search engines like Yellow Pages, Yahoo Local, Google's local business online or a phonebook	www.yellowpages.com www.local.yahoo.com
Business & Recreation	Small Business Associations	Business associations, Local/Regional Chamber of Commerce, or local economic development websites. See example website	www.score.org/index.html
	Manufacturing Centers	Business associations or Chamber of Commerce	www.ilchamber.org
	Realtors	IL Association of Realtors website	www.illinoisrealtor.org/FirmSearch/FirmSearch.aspx
	Large Regional Employers	Business associations, Local/Regional Chamber of Commerce, or IL Department of Labor	www.state.il.us/agency/idol/Facts/contact.htm
	Shopping / Community	Check local visitor's bureau, phonebook, or Yahoo	www.yellowpages.com

Stakeholder Groups	Stakeholder Agencies	How to Find Stakeholders in Your County Where To Look:	Possible Websites:
	or Minority-owned Grocery Stores, Business Parks, Dining Areas, & Theaters	Local/Yellow Pages online. Note that local shopping areas could be outside county	www.local.yahoo.com
	Community Centers / Park District Programs	Check county (IL Courts directory on left hand side) or library websites	www.state.il.us/court/probation/default.as p www.publiclibraries.com/illinois.htm
	Banks	Local lender website, search by county	www.locallender.info/banks/illinois-banks
Multicultural	Refugee Centers	IL Coalition for Immigrant and Refugee Rights website looking under Partners & Allies or call directly	www.icirr.org/en/icirr-directory/partner
	Minority Businesses	Check for a community minority business directory on county or economic development websites	www.ilbcc.org http://www.ihccbusiness.net/ http://www.sblink.us/html/uswcc-illinois.aspx
Media	Local TV News Networks	Numerous news outlets and programs are owned and distributed nationally; look for local and regional affiliate stations like PBS, ABC, NBC, FOX, etc. Note that these can cross state borders	
	Local Newspapers & Newsletters	Check local libraries or Yahoo Local/Yellow Pages websites, and/or phonebook. Check local churches, community groups, coalitions and other groups	www.yellowpages.com www.local.yahoo.com
	Local Radio Stations	Numerous news outlets and programs are distributed nationally, look for local and regional affiliate stations like NPR. Note these can cross state borders, often found at colleges and universities, and can be outdated quickly	www.en.wikipedia.org/wiki/List_of_radio_s tations_in_Illinois
	Professional & Social Networking Groups	Check membership organizations or groups, Rotary Clubs, Facebook, Twitter, and LinkedIn	www.facebook.com www.twitter.com
	Local Websites	Check county (IL Courts directory on left hand side)	www.state.il.us/court/probation/default.as

How to Find Stakeholders in Your County

Stakeholder Groups	Stakeholder Agencies	Where To Look:	Possible Websites:
		and township websites as well as any local directories	p
Other Stakeholders You Identify:			

The Stakeholder Contact List (page 13) contains a blank area to fill in all stakeholders you identify with their contact information. As previously stated, your stakeholders may be different people at varying levels of coordination. Therefore, keep in mind Common Contacts when completing this sheet, as there may be numerous contacts per agency and you may need to increase rows to include every contact. After your list is complete, keep in mind the varying Stakeholder Roles or Functions (page) there are when communicating with and providing outreach to your groups.

Common Contacts

This is a list of common positions and titles of stakeholders to involve at varying levels.

o Executive Directors

o Project Managers / Coordinators / Transit Specialists

o Call Takers / Dispatchers

o Public Health Administrators

o Nursing Coordinators / Doctors / Nurses / Medical Professionals

o Case Workers / Outreach Specialists / Advocates / Senior Information Service (SIS) Workers

o Business Owners / Administrative Staff

o State Senators / Representatives / Transportation Committees

o Staff Members / Workers / Employees

o Caregivers / Foster Parents

o Teachers / Principals / After School Coordinators / Unit Educators

o Student Affairs Representatives

o Trainers

o Volunteer Coordinators / Volunteers

o County/State Probation Officers

o Chiefs /Lieutenants /Officers

o Lawyers

o Various Religious or Community Leaders

o Leaders / Public Service Administrators

o Community Planners

o Community Resource Information Clerks / County Board Members / Chair of the Boards / Transportation Subcommittee Chairs / City Council Representatives

o Federal Senators / Representatives / Transportation Committees

o Village / Township Mayors / Local Leaders / Supervisors

When identifying stakeholders, some may be more appropriate to participate at different levels. For example, you may have an executive director of a county health department participating in regional coordination, and a nursing coordinator participating in the local coordination effort. While it is unlikely to get equal and consistent participation from each stakeholder at all levels, efforts should continually be made to bring them to meetings. However, do not let the lack of a particular group or their active participation hinder local mobility management efforts.

Stakeholder Contact List: Template

Groups	Agencies	Organization	Area	Name	Position	Email	Phone	Address
Public Transit	Local Public Transit Systems							
	Regional Coordinators							
	IDOT Staff							
Private Transportation	Taxi Companies / Private Shuttles							
	Charter / Intercity Buses							
	Rail Systems							
	Regional & National Airports							
Medical Services	Medicaid Transit Providers							
	County or City Health Departments							
	Emergency Medical Transportation Providers							
	Air Medical Service Providers							
	Doctor's Offices & Clinics / Dental Offices							
	Area Hospitals							
	Mental Health & Counseling Offices / Rehabilitation Centers							
	Psychiatric Hospitals							
	Substance Abuse Treatment Centers							
	American Red Cross							
Seniors	Adult Day Services							
	Nutrition Programs							
	Area Agencies on Aging Offices & Programs							
	Retirement and Civic Centers							

Groups	Agencies	Organization	Area	Name	Position	Email	Phone	Address
	In-Home Service Offices & Programs							
	Elder Abuse Agencies							
	Nursing Homes / Hospice Care Programs							
People with Disabilities	CILs							
	Easter Seals of Illinois Offices & Programs							
	Area of Special Education Offices							
	Department of Rehabilitative Services							
	Residential Schools							
	Local HRC							
	Developmental Disabilities Centers & Programs							
	Developmental / Rehabilitation Centers							
Families & Youth	DCFS							
	Family Violence Prevention Centers							
	Foster Parent Agencies							
	Division of Child Support Enforcement							
	Juvenile Court & Probation Services / Youth Detention Centers							
	Family Case Management Offices / Family Resource Centers							
	State Developmental Centers							

Groups	Agencies	Organization	Area	Name	Position	Email	Phone	Address
Community Service Agencies & Volunteer Groups	Food Pantries							
	Homeless Shelters							
	Community Action Agencies & Programs							
	United Way							
	YMCA/YWCA Offices & Programs							
	RSVP							
	4-H Club Programs							
	Other Community Service Groups							
	Community Leaders							
	Salvation Army Offices							
	Illinois Municipal League							
Housing	County Housing Authority Offices							
Veterans	Regional VA Offices							
	VFW Local Offices, Branches, or American Legions							
	Veterans' Employment & Training Services							
	Veterans Assistance Commission (VAC)							
Education	Pre-Schools							
	Head Start Programs							
	K-12 Private & Public Schools / School District Offices / Regional Education Offices							
	Colleges / Universities / Community Colleges							
	Libraries							

Groups	Agencies	Organization	Area	Name	Position	Email	Phone	Address
	Literacy Groups							
	ESOL Programs							
	University of Illinois Extension Offices							
Religious Community Groups	Faith In Action Programs							
	Religious Social Service Agencies							
	Churches / Mosques / Synagogues / Etc.							
Government Agencies, Staff, & Elected Officials	County Government Buildings							
	Federal Representatives							
	State Representatives							
	County Representatives							
	Township Representatives							
	Regional Planning Commissions / Council of Governments / Metropolitan Planning Organizations							
Justice	State or County Attorney							
	Legal Aid Programs							
	Domestic Violence Intake Centers							
	Court & Probation Services							
	State & Local Law Enforcement Agencies							
	Local & Federal Prisons							
Economic, Planning, & Development	Economic Development Corporations / Councils							
	Convention & Visitors Bureau							

Groups	Agencies	Organization	Area	Name	Position	Email	Phone	Address
	Chambers of Commerce							
	MPO(s)							
	Farm Bureaus							
Employment	Employment & Vocational Training Centers / Workforce Development Centers							
	Unemployment Offices							
	Temp Agencies							
	Small Business Associations							
	Manufacturing or Service Centers							
	Realtors							
	Large Regional Employers							
Business & Recreation	Shopping / Community or Minority-owned Grocery Stores, Business Parks, Dining Areas, & Theaters							
	Community Centers / Park District Programs							
	Banks							
Multicultural	Refugee Centers							
	Minority Businesses							
	Local TV News Networks							
	Local Newspapers & Newsletters							
Media	Local Radio Stations							
	Professional & Social Networking Groups							
	Local Websites							
Other Agency								

Groups Contacts You Identify:	Agencies	Organization	Area	Name	Position	Email	Phone	Address

Stakeholder Roles - There are many ways to use stakeholders in your transit system's coordination, conducting outreach, marketing, and gaining community involvement. However, communication goes both ways; a public transit system shares information with stakeholders and stakeholders share information with the public transit system. By knowing and communicating regularly, you will be better able to use stakeholders' skills and keep them engaged, which will ultimately benefit all riders. These are some common stakeholder roles that you might find and their descriptions:

Roles	Description
Potential Rider	Actively seek potential riders. Show benefits of using public transit, answer questions, and get guidance on developing messages for others. This stakeholder could be someone who wants to use the public transit system but needs benefits to outweigh costs. Other potential riders may want to use the public transit system but need more information to do so successfully, therefore, marketing and outreach to them will likely increase ridership.
Day-to-Day Service Coordination	The riders, agencies, service contracts, medical agencies, and others you are in contact with daily often have knowledge to help outline transit needs and help plan new services. This is commonly referred to as "trip planning" or "scheduling" and normally involves those community resources that providers contact daily in order to meet needs and schedule trips.
Transit Liaison or Training Contact	This could be a transit expert that promotes the public transit system or a contact person within the public transit system that riders call to get their questions answered.
Materials Distributor	These stakeholders can help you efficiently share the most current information with the public. Make sure they receive updated brochures and local/regional mobility guides each time they are printed and know who to contact if they need additional materials or have questions.
Referrals / Outreach / Marketing	These stakeholders can refer riders or conduct outreach and marketing for the public transit system. Referrals should be seen as mutually beneficial between public and private providers.
Peer Contact(s)	These stakeholders can be technical resources, as well as contacts to help meet rider needs. For example, a neighboring public transit system could be taking a long distance medical trip and have the capacity to transport a rider that you are unable to serve. The peer contact can also include those in the human service and coordination fields.
Technical Resource	Some of these stakeholders specialize in funding or system regulations and could assist with these issues.
Community Information	These stakeholders are a good source of knowledge about potential riders and their needs. They can help gather information for trip planning and community events to market transit services.
Funding Source	Within rural public transit systems there are varying sources of funding that may need a local match. A stakeholder that is a potential funding source and the public transit system can meet this local match through developing mutually beneficial service contracts.
Possible Service Contracts - Afterschool/Daycare	These stakeholders may have program funds for clients and are a good place to contact to develop service contracts. Agencies with clients or programs (even if no service contract is possible) are good sources for predicting rider trends and places to conduct potential rider outreach. Some stakeholders may have regulations preventing the public transit system from contracting all program services, but afterschool or daycare transportation contracts may still exist.

Marketing and Outreach Tool

Marketing Plan Checklist Guide

A public transit system's primary goal should always involve a customer centered approach that addresses the community's needs; therefore, a public transit system must inform the community of what their services are and the benefits they offer to meet those needs. To accomplish this and to gain buy-in, a public transit system must produce, implement, and evaluate a marketing plan.

A marketing plan does not need to be complex. However, it should contain the following parts: marketing objectives; activities with action steps to meet those objectives; a timeline for implementation; a budget; and a method to evaluate marketing effectiveness.

Before work on a marketing plan begins, clearly establish roles for everyone involved. This guarantees that marketing responsibilities will not fall onto a single person. Directors, staff, and any boards that are developed should be included in the marketing process. Those chosen for such positions must be persistent and have strong leadership skills.

Be realistic about the time and resources you have available and only work on the activities you can accomplish well. While it would benefit your public transit system to participate in all of the activities listed on the following pages, it is better to prioritize several activities rather than attempting all activities. Once you've seen some success on the more important activities, move onto the others.

A marketing plan should be reviewed annually to assess whether it can be more specific or better reflect current marketing activities. The following pages provide a checklist of activities, action steps, and three worksheets to create or update a marketing plan. This checklist is based on marketing best practices.

Marketing Strategies Within The Checklist

1. Community Outreach
   - Develop Local Advisory Board(s)
   - Create Community Feedback Forum(s)
   - Publish a Newsletter
   - Participate in Community Events
   - Participate in Targeted Outreach
   - Develop a Travel Training Program

2. Branding
   - Develop or Enhance an Image

- Actively Manage Your Image

3. Rider Information and Awareness
    - Develop a *Rider Mobility Guide*
    - Develop a Website
    - Utilize Social Networking Sites

4. Media Advertising
    - Maintain Strong Media and Public Relations
    - Advertise the Public Transit System
    - Participate in Public Speaking Events
    - Embark on a Testimonial Campaign

5. Customer Service
    - Develop a Customer Feedback System
    - Market Internally
    - Administer Rider and Non-Rider Surveys

6. Additional Marketing Strategies
    - Sell Advertising Space on Transit Vehicles

Possible Marketing Objectives

Marketing objectives support a public transit system's mission and assist in accomplishing its goals. Your objectives should guide which marketing activities are included in your plan. Below are several sample marketing objectives.
• Build greater awareness of the transit services offered • Increase the availability of information • Enhance rider knowledge of the public transit system • Build a more positive image through better customer service • Make the public transit system easier to understand • Make transit more appealing for everyone

It may be beneficial to be more specific on your marketing objectives. For example, instead of stating that you wish to build a more positive image through better customer service, you could say that you wish to reduce customer complaints by 10%. Reducing customer complaints by 10% would create both a more positive image and improve customer service.

Checklist Directions

1. <u>All</u> decisions made throughout your marketing plan should be customer-focused. Review your transit system's mission statement to verify it is focused on the rider. If you do not have a mission statement, it is critical to your marketing plan to develop one. A sample can be found on the Marketing Objectives Worksheet* (page126). Write your transit system's mission statement in the box provided on this worksheet.

2. After reviewing, updating, or drafting a mission statement, determine those objectives you wish to accomplish with your marketing plan. A list of sample objectives has been provided at the bottom of this page; please note that this list is not comprehensive and you may have additional objectives you would like to accomplish. Once you have determined your marketing objectives list them on the Marketing Objectives Worksheet* (page 126).

3. Once you have selected the objectives you wish to accomplish, read pages 2 through 26 for activities that may help you complete them. As you read through these activities, place a check next to those activities you wish to include or expand upon in your marketing plan. If you are currently engaged in an activity, that's great! Based on the "Action Steps" listed, determine whether or not there are additional actions that can be taken to further improve the activity and continue participating in that activity. At the end of each table is an open box for you to write in any additional activities you wish to engage in related to the strategy.

4. After selecting activities you wish to focus on, go to the Marketing Activities Worksheet** (page 127). Follow the instructions on the worksheet.

5. Finally, go to the Marketing Evaluation Worksheet*** (page 128). This worksheet will establish how to evaluate whether the marketing activities are successful. Follow the instructions on the worksheet.

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*[Marketing Objectives Worksheet](#)

**[Marketing Activities Worksheet](#)

***[Marketing Evaluation Worksheet](#)

Strategy 1 – Community Outreach

☐Activity: Develop Local Advisory Board(s)	
Local Advisory Boards (LABs) provide support to your transit system. By providing a Board in which all people are represented, your transit system is providing an opportunity for the discussion of key issues. Enlist the support of a dynamic group of people and have LABs demographics and backgrounds of its members representative of the local community.	
Action Steps	**Considerations**
☐Determine characteristics of specific groups in your community.	o Seek different organizational positions, not only administrative heads, but people who work closely with anyone who uses public transit.
☐Recruit Board Members	o Go to agency and community meetings. o Professionally network; follow up with contacts.
☐Develop a Stakeholder Contact List* (Appendix A).	This list should contain individuals and agencies with a stake in public transit. Some examples include: o Disability advocates o Assisted living centers o Employment centers o Educational institutes o Social service providers o Environmental groups
☐Establish a meeting schedule.	o Keep the schedule consistent; confirm the next meeting date before ending current meeting. o Establish subcommittees if there is a need to address a specific issue or to avoid overwhelming the whole group.
☐Establish roles within the group.	o Not all meeting responsibilities should fall on one person. Select a leader(s) from the public transit system and the community. o Consider establishing one transit "point-person" per agency or business that is the go-to person for meetings or to distribute materials when needed.

☐Activity: Create Community Feedback Forum(s)
Allow all people a voice in the direction of your transit system. Only by involving a wide variety of people can all populations be reached.

Action Steps	Considerations
☐Host a public forum for all stakeholders.	o These can be held as meetings, online posts, etc.
☐Create a daily feedback system: ☐Telephone (toll-free number) ☐Website ☐Blog post ☐Postage-paid cards ☐Customer suggestion boxes ☐Email address	o The feedback system could be on your website, a county website, or any websites where public information is posted. (For more information on developing a system website see Activity: Develop a Website*, page 115) o A feedback system should be easily accessible by everyone; the Local Advisory Board should discuss a representative sample of comments. o Provide a follow-up response to the reporting party if requested.
☐Survey: ☐Local agencies ☐Riders ☐General community	o To encourage participation, offer a free ride coupon for completing the survey.

*Activity: Develop a Website

☐Activity: Publish a Newsletter Support on-going campaigns and discuss relevant transit stories. Keep the public involved in the issues facing public transit and promote your transit system. Focus on the Positive!	
Action Steps	**Considerations**
☐Select newsletter topics or themes.	o Do this as often as needed. Consider having others mass distribute it via email or print (Example: Ask the agencies involved in the local advisory board to put transit information in their newsletters.) o In cases where suggestions or complaints have been addressed, include the resolution in the newsletter to show you are responsive to riders' needs.
☐Ask stakeholders to contribute sections and success stories.	o Stakeholders writing stories can be: o Riders o Agencies you work with o Your staff
☐Feature testimonials. (For more information on testimonials see Activity: Embark on a Testimonial Campaign*, page121)	o Testimonials should be a mix of different genders, ages, ethnicities, etc. o Interview "choice" riders (Choice riders are people that have a choice between using their own vehicle and public transit and they choose public transit).
☐Include a section with up-to-date information on service routes, hours, how to use system, and service statistics.	o Statistics can include: number of rides given; number of miles driven; economic impact, etc.
☐Introduce employees and their job duties or feature an outstanding employee.	o Rotate who is featured and highlight different positions.

*Activity: Embark on a Testimonial Campaign

☐Activity: Participate in Community Events Maintaining tent space or a booth at various events is one strategy by which to reach out to the general public in a friendly, social environment. If your transit system takes an active interest in the community, the community will be more likely to support the system. Sign up early to get free mentions (advertising) in event promotions.	
Action Steps	**Considerations**
☐Make a list of event dates and attend whenever possible.	o If resources are limited, vary events throughout the year to reach different locations, populations, or high target areas. o Tailor brochure or other information to the event's audience.
☐Provide free event rides and pass out brochures.	o Track the number of people taking free rides and the number of brochures given out.
☐Have conversations with event attendees to learn about their issues, concerns, needs, and wants.	o Find out if they are aware of your transit system, if they use it, why they use it, and if not, discover reasons why they may need it in the future. o Target all age groups and people of different backgrounds.
☐Participate in local: ☐Food drives ☐Blood drives ☐Recycling drives ☐Charity events, etc	o Ask staff to volunteer at these events. o Provide public transit to and from the event. Important: be aware of any laws restricting public transit from providing service to these events.
☐Take several pictures of the event and with people interested in public transit	o Acquire a photo release form from individuals in the pictures. o Post photos on any social networking sites you are involved with. (For more information on a social networking sites see Activity: Use Social Networking Sites*, page 117) o Post photos on your transit system's website. (For more information on building a public transit system's website, see Activity: Develop a Website**, page115)

*Activity: Use Social Networking Sites

**Activity: Develop a Website

☐Activity: Develop a Travel Training Program	
Creating an environment where new riders can become comfortable with the public transit system is an effective way to attract new riders. Travel training programs help the individual get over their fears surrounding the public transit system by giving them the information they need to be successful riders.	
Action Steps	**Considerations**
☐Develop a travel training program for riders.	A travel training program for riders typically consists of: o Classroom Time - a presentation about how to use the public transit system, and o Field Time – giving participants a chance to get on a vehicle and use it themselves.
☐Develop a travel training program for agencies that work with groups of potential riders	A travel training program for agencies typically consists of: o Classroom Time - a presentation about how to use the public transit system, and o Field Time – giving participants a chance to get on a vehicle and use it themselves.
☐Once a travel training program is available, share it with groups that might benefit from more knowledge about the public transit system.	Possible target groups include: o Human service agencies o Employment centers o Disability advocates o Seniors o Schools o See Stakeholder Contact List* (Appendix A) for other possible target groups.

*Stakeholder Contact List (Appendix A)

☐Activity: Participate in Targeted Outreach
While many of the previous strategies work with the public in large groups, targeted outreach identifies specific groups that may gain more from using public transit; these are core public transit users.

Action Steps	Considerations
☐Identify and maintain strong relationships with businesses and social service agencies that work closely with specific groups of people.	o Developing a Stakeholder Contact List (Appendix A) is an effective strategy to see which businesses and human service agencies have a greater need for public transit.
Possible groups for targeted outreach include: ☐Senior citizens ☐Medical providers ☐Low-income families ☐People with disabilities	o Focus on groups that may be more transit-dependent.
☐Mobilize businesses and human service agencies to become advocates for public transit for the people they work with.	o Establish service contracts with businesses and human service agencies whose patrons use public transit often, are dependent on it, or would benefit from using it.

Other Successful Community Outreach Activities To Start (Open Ended):

Strategy 2 - Branding

☐Activity: Develop or Enhance an Image Developing a cohesive image to represent your transit system's brand to the public is an important task for the marketing plan. The elements of branding should build awareness of what your transit system can do, create visibility in the community, display a unified system, and create a positive perception of your transit system.	
Action Steps	Considerations
☐Develop a logo or determine an existing logo's impact.	o This should be an easily recognizable graphic related to public transit. o Use a magnet for the graphic if there are restrictions on vehicle alteration. o If you change your logo, update everything simultaneously.
☐Fleet vehicles should have a coordinated color scheme.	o The color scheme should be unique and bring positive attention to the vehicle. o Important: This may not be an option for federally/state funded vehicles; check grant restrictions.
☐Develop a slogan or tagline	o This should be a catchy, memorable phrase communicating a positive quality of your system. o The local advisory board should be consulted for input. (For more information on Local Advisory Boards see Activity: Develop Local Advisory Boards*, page 106)
☐Build awareness and visibility.	o Create a positive perception of your transit system.

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*Activity: Develop Local Advisory Boards

☐ Activity: Actively Manage Your Image Do not let misperceptions of your system allow for false realities to exist in the general public. Take a proactive approach to managing your image. Don't let these false realities determine your system's image.	
☐ Don't allow stereotypes to tarnish your transit system.	o A common perception of public transit is that is for a certain segment of the population (seniors, people with disabilities, the low income, etc.). Work on dispelling this stereotype. o Embark on campaigns to make your transit system more appetizing to the general public.
☐ Push the message that your system is NOT a form of specialized transit, but that it is for EVERYBODY!	o In many situations, when people see a transit vehicle in the rural areas they believe that it is only available to a certain segment of the population. Clearly express that this service is for everyone.

Other Successful Rider Information and Awareness Activities:

Strategy 3 – Rider Information and Awareness

☐Activity: Develop a Rider Mobility Guide
In most public transit systems, a Rider Mobility Guide is the single most important marketing tool. This should include all the information that is necessary for the individual to successfully use the public transit system. Consider providing the Rider Mobility Guide in multiple languages, Braille, large print, etc. When developing, consider the following: **Ease and cost of updating information,** ☐ Printing cost, ☐ Ease of use, and ☐ Ease of distribution.

Action Steps	Considerations
☐Give all essential information for the rider to obtain a ride.	Information in this section of the Rider Mobility Guide should explain: o Who can use the system; o When the service is available; o What kind of vehicle will pick up the rider; o Where the rider will be picked up; o Fare and method of payment; o How to schedule a ride; o How to request a return ride; o Instructions for multiple destination trips; o Policies for trips outside service area; and o Who to contact with additional questions.
☐Include the public transit system's policies.	o Include cancellation policy, minimum notification rules, and consequences for late cancellations or no shows.
☐Include people or programs that will provide additional assistance.	o Include phone numbers of any social service agencies that may supplement a portion of the trip. o Provide information on the process of scheduling Medicaid approved trips.
☐Provide all transit vehicles with an adequate amount of Rider Mobility Guides.	o The driver should carry ample amounts of the guide with them at all times. o Install racks to hold several guides. o Pitch old and worn guides at the beginning of each shift. Keep a clean image of your transit system.

☐Activity: Develop a Website	
Since many people find information online rather than through paper documents, information must be available through a public transit system's website. Several resources exist to assist with building a website and some provide free web space and easy to use templates to create a website.	
Action Steps	**Considerations**
☐Provide contact names, phone numbers, and email addresses.	o Include your transit system's phone number and email address. o Consider including social service agencies that may supplement some portion of trip. o Determine if it is the responsibility of the rider to contact the social service agency or whether it is the responsibility of your transit system. o Identify whether the social service agency contacts your transit system to determine funding the ride or whether your transit system contacts the social service agency to determine the funding of the ride.
☐Update frequently.	o Unlike the printed guides which should not contain time-sensitive information, the website may contain time-sensitive information.
☐Include a "Frequently Asked Questions (FAQ)" section.	o Include all important information regarding your transit system. Include any updates immediately.
☐Provide information on days without service.	o List days when service will not be provided. If additional closings occur, such as a weather related issues, list possible reasons and notification procedures.
☐Choose a web address that is easy to remember; for example: www.abc.countypublictransit.com.	o The web address should be easy to remember and contain part of the public transit system's name in it.

☐Post your transit system's website link to the following external websites: 　☐Chambers of commerce 　☐Churches 　☐City, townships, or village government 　☐County government 　☐Human service organizations 　☐Libraries 　☐Local newspapers 　☐Other public transit systems 　☐Schools	o Keep track of where these links are posted; check links often to ensure they are working properly. o Track the number of visits to these websites and/or those clicking on your link. o Some websites are more popular than others. Obtain permission from these sites to post your link. o If developing a website is not an option, post an online version of your brochure to some of these websites.
☐Check your website accessibility: ☐Use federally approved "WAVE" website to check on accessibility issues for people with physical disabilities. http://wave.webaim.org/* ☐List the "Google Translate" link so that users can translate your website into other languages. http://translate.google.com**	o WAVE is a free resource that can be used to diagnose accessibility issues and explain ways to fix them. o Google Translate should only be used as a short term solution. Professional translation should be inevitably sought out. o Google Translate is a free resource that will translate website into any language the visitor selects. It does not automatically translate PDFs or other documents found on your website.

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*http://wave.webaim.org/

**http://translate.google.com

☐Activity: Use Social Networking Sites (Facebook, Twitter, etc.)	
Most social networking sites are free services you can use to spread your message. Many social networking sites have various methods that can be utilized to keep people aware of up-to-date transit information.	
Action Steps	**Considerations**
☐ Develop a fan page for Facebook, join a Twitter Group, or join other social networking sites.	o Many people and organizations already use Facebook; however, you may have to 'show' people where to sign up for newsfeeds.
☐ Include a forum for discussion.	o Appoint someone from your transit system to maintain a web presence and read postings daily. o Reply to questions immediately.
☐ Update time-sensitive service information as soon as possible.	o When there is little information to update, feature a rider or staff story occasionally to inspire people to use the public transit system.
☐ Actively participate in pages related to yours.	o This is an effective way to reach out to potential riders.

Other Successful Rider Information and Awareness Activities:

Strategy 4 - Media Advertising

☐Activity: Maintain Strong Media Relations and Public Relations	
Whether you have a new or well-established public transit system, maintaining a strong relationship with the media and the public is crucial. Since negative news travels quickly, it is important to share positive news whenever it occurs and work to correct situations that may lead to a negative impression.	
Action Steps	Considerations
☐Appoint an official spokesperson.	o Keep an open mind. Negative stories tend to get greater publicity than positive stories. Do not make an enemy out of the media. o Invite the media to your Local Advisory Board meetings and/or share information after meetings to keep them updated. (For more information on Local Advisory Boards see Activity: Develop Local Advisory Boards*, page106)
☐Use public access television.	o Using public access television can be a cost-effective and sometimes free way to share information about your transit system.
☐Organize a brief public service announcement.	o In service areas with diverse groups of people consider having this translated to other common languages.
☐Participate in an on-going advertising campaign.	o Find ways to split the cost of advertising with mutually beneficial programs.
☐Make attempts to speak on weekly radio shows to explain impact of public transit on the community.	o This should be a task for the official spokesperson. o Always have a brief service announcement ready.

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*Activity: Develop Local Advisory Boards

☐Activity: Advertise the Public Transit System	
Utilizing on-going media advertising creates and maintains awareness. One goal of any advertising campaign should be to overcome the mindset that public transit is just for a certain group of people.	
Action Steps	Considerations
☐Acquire ad space in the newspapers, newsletters, and church bulletins.	o Newspapers may allow advertisement for free or at a discounted price. o Notify the newspaper during promotional events and ask them to report on it. o Link public transit to local news and share the information with reporters.
☐Purchase underwriting on public radio stations.	o If you serve an area that speaks different languages, have advertising translated.
☐Purchase billboard advertisement space.	o Billboards are more effective in areas where there are major roadways that are well-traveled.
Post fliers at: ☐Chambers of Commerce ☐Churches ☐Community centers ☐Employment offices ☐Food banks ☐Gas stations ☐Grocery stores ☐Independent/assisted living centers ☐Libraries ☐Meals on Wheels ☐Popular community locations ☐Public housing ☐Restaurants and bars ☐Schools	o Track distribution: o Keep track of where and whom materials are distributed to; and o How many are distributed to each location.
☐Use free community event calendars for event promotion.	o Most small communities are happy to allow for event promotion. It is a benefit to the community.
Have your website link posted on websites transit riders are likely to visit such as: ☐Chamber of commerce sites ☐Community sites ☐County sites ☐School sites (as long as there are no issues with school buses) ☐Any transportation related sites	o Ask for visitor statistics from the websites you wish to post a link with. o If possible, ask for a count to be done of how many people click on your link from other sites.

☐Activity: Participate in Public Speaking Events	
Public speaking plays a big role in attracting riders to the public transit system, especially starting a system or when you are trying to gain more visibility. Presentations should be on how to properly use the public transit system and its benefits. After presenting, an effective strategy to attract potential riders is offering rides to a popular destination or letting people tour the vehicle.	
Action Steps	**Considerations**
☐Offer presentations to community groups on how to use your transit system.	o Community group presentations should be a continual activity; often evaluate its effectiveness.
☐Participate in on-going public speaking opportunities.	Seek out organizations to speak with, possible venues include: o Chambers of commerce o Civic groups o Community centers o County board o Fairs o Schools o Senior and public housing o The organizations represented on the Local Advisory Board.

Host booths at:
  ☐Business expos
  ☐Parades or county fairs
  ☐Health and informational fairs
  ☐Local entertainment events
  ☐Senior citizen events
	o Plan ahead of time and bring enough materials and resources with you.
	o Target your brochures, giveaways, etc. to the particular audience.

☐ Activity: Embark on a Testimonial Campaign	
Embarking on a testimonial campaign can help dispel the mindset that public transit is just for a certain group of people. Individuals who are interviewed for testimonials should be representative of the population as a whole. Concentrating only on transit-dependent individuals may not convince choice riders to use the public transit system.	
Action Steps	**Considerations**
☐ Obtain testimonials from riders/beneficiaries of the public transit system.	o Invite anyone who benefits from your transit system; include relatives of riders to describe the importance or impact of the system for their loved one(s). o Testimonials should address what transit service(s) rider uses and how they use it. o Maintain confidentiality among those that give testimonials. Gain signed permission forms before using anyone's information and do not use last names. o Additional sources may include: o Business owners o Caseworkers o County board members o Parents
☐ Pay special attention to "choice riders."	o These are people that have a choice and choose public transit over other modes of travel. These riders can be more convincing to those not using public transit because they don't have to use it, but use it because they choose to.
☐ Obtain testimonials from drivers/dispatchers.	o Drivers and dispatchers deal with riders on a daily basis and know the issues riders face the best.
☐ Obtain testimonials from volunteer drivers/dispatchers.	o Use volunteer drivers and dispatchers to gain support for more drivers if needed.
☐ Place testimonials in newspaper, websites, etc.	o If the rider would like, place their picture with the testimonial to give a "face" to public transit.

Other Successful Media Advertising Activities:

Strategy 5 - Customer Service

☐Activity: Develop a Customer Feedback System Providing a system in which riders have the option to comment on issues related to your transit system is the first step in understanding the concerns of your riders. It also provides an opportunity for the rider to comment on what they see is working well.	
Action Steps	Considerations
☐Provide a customer feedback system on your website. (For more information on website development see Activity: Develop a Website*, page115)	☐ Allow the rider to choose if they wish to comment anonymously or if they wish to provide their contact information. ☐ If the rider gives their contact information, follow-up with them immediately to show that their concerns are being investigated. ☐ Include an option for the rider to "recognize" a good driver. Include this recognition in the internal newsletter. (For more information on internal newsletters see Activity: Market Internally**, page 123)
☐Distribute customer satisfaction cards on all of the transit vehicles and with all of the drivers.	o Provide a locked comment drop box on the transit vehicle for the rider to share their comments. o Allow the rider to choose if they wish to comment anonymously or if they wish to provide their contact information. o If the rider gives contact information, follow-up with them immediately to show that their concerns are being investigated. o Include an option on the card for a rider to "recognize" a good driver. Include this recognition in the internal newsletter. (For more information on internal newsletters see Activity: Market Internally**, page123)

*Activity: Develop a Website
**Activity: Market Internally

☐Activity: Market Internally	
Keeping employees and volunteers motivated is an effective approach to improving customer service. If employees and volunteers find that their service is valued, they are more likely to keep that service in good standing.	
Action Steps	**Considerations**
☐Inform employees/volunteers about the activities in which your transit system is engaged.	o Have meetings and provide information. o Help them to understand what they do is important. o Thank employees and volunteers for the things they do that you appreciate and value.
☐Distribute an internal newsletter.	o Use newsletters to inform and motivate employees/volunteers.
☐Reward employees/volunteers for safety and good customer service.	o Providing incentives to those employees and/or volunteers with high performance encourages all to go beyond their job duties.
☐Provide an opportunity for driver input in a round-table discussion.	o Conduct monthly/quarterly meetings to discuss service issues pertaining to riders. Identify service problems and develop ways to reduce them.

☐Activity: Administer Rider and Non-Rider Surveys To better understand where improvements should be made, ask riders and non-riders and implement appropriate changes.	
Action Steps	**Considerations**
☐Conduct surveys annually.	o If financially feasible, hire a survey agency to conduct surveys occasionally. This reduces bias.

Explore several types of surveys:
    ☐On-board
    ☐Mail
    ☐Web-based
    ☐Telephone
	o On-board surveys obtain in-depth answers and are an excellent way to obtain testimonials, but are the most time-intensive, and more costly. (For more information on testimonials see Activity: Embark on a Testimonial Campaign*, page 121)
	o Aside from on-board surveys, mail surveys are the most expensive.
	o Web-based and telephone surveys can gather a larger survey responses at a cheaper cost.

☐Determine rider wants and needs.	o Document and create solutions to meet needs.
☐Analyze results and identify opportunities to improve.	o Discuss results with your staff, your advisory board, and ask for peer agency advice and ideas. o Track improvement from year-to-year.
☐Make surveys anonymous.	o Have a "drop box" instead of having the rider hand the survey to the driver.

Other Successful Customer Service Activities:

Strategy 6: Additional Marketing Strategies

☐ Activity: Sell Advertising Space on Transit Vehicles	
The sale of advertising space on a public transit vehicle can offset some of the cost of operating the public transit system. Allowing businesses to advertise on transit vehicles brings awareness of the public transit system to the business community, who then through a vested interest in the system, will work to promote the system.	
Action Steps	**Considerations**
☐ Offer advertising space inside and outside of transit vehicles to local business.	o There are "frames" that can be placed on the insides and outsides of transit vehicles to place placards for advertising businesses.
☐ Offer "vehicle wraps" to local businesses.	o Vehicle wraps cover a portion of the transit vehicle advertising for a business. o Have information available about benefits to bring to area businesses to encourage their participation. o Important: Check local ordinances; some communities have strict laws against the use of vehicle wraps.

Other Successful Activities:

Marketing Objectives Worksheet

If your transit system does not have a mission statement, developing one will increase your marketing plan's effectiveness. The mission statement should be focused on the rider. Write your transit system's mission statement in the box provided below. Below is a sample mission statement developed using themes found in several public transit system mission statements.

"To promote the independence, self-sufficiency, and economic opportunity of all residents in our community by providing accessible, affordable, and efficient public transit."

Mission Statement:

The primary purpose of your marketing objectives should be to support the mission statement. Evaluate your objectives to see how they accomplish this. If a marketing objective does not support the mission statement, change how the marketing objective is written.

For example, instead of your marketing objective stating, "We want to generate more revenue" relate it back to your mission by stating, "We want to generate more revenue to expand our hours of service." Note how the first statement only applies to what your transit system gains, but the second statement shows what your transit system and the rider gains.

Use the chart below to track the objectives you wish to accomplish through the activities outlined in your marketing plan. Add more rows if necessary.

Marketing Objectives (Review the Possible Marketing Objectives table for examples)

Marketing Activities Worksheet

Select those activities checked off or developed between pages **Error! Bookmark not defined.** and **Error! Bookmark not defined.**. Print a separate copy of this worksheet for each activity you choose to work on. Fill in the table by identifying which of the six strategies your marketing activity falls under. Then, list those action steps by which you plan to enact this activity. List any considerations to be aware of while working on the marketing activity and add more rows if needed. At the bottom of the table, estimate how long it will take to implement the marketing activity, followed by how often you will revisit it to determine its progress. Lastly, fill in the budget amount that will be dedicated to this marketing activity.

Strategy:

Activity:

Action Steps	Considerations
1.	1.
2.	2.
3.	3.
4.	4.

Implementation Timeline:	Updating Schedule: Annual Quarterly Monthly	Budget:

Marketing Evaluation Worksheet

On this worksheet you will take the first 5 strategies from the "Marketing Strategies" and determine how to evaluate their effectiveness. If you did not select or develop an activity from a particular strategy, you do not need to fill in that box.

Remember to take a rider-focused approach by identifying the rider as the focal point within the evaluation. Individual marketing strategies should be evaluated on how they work to accomplish the mission statement.

Strategy 1: Community Outreach
Strategy 2: Information and Awareness
Strategy 3: Branding
Strategy 4: Advertising
Strategy 5: Customer Service

Rural Travel Training Tool

3 Steps for a Successful Rural Travel Training (RTT)

Step 1: RTT Planning

1. Review RTT Curriculum
2. Contact your HSTP coordinator to assist with first few RTTs
3. Select two 5311 staff (with good communication skills) to co-facilitate the RTT:
    - Administrative: good understanding of policies and procedures, such as transit director, manager, or marketing person
    - Front Line: works directly with riders such as a driver or dispatcher
4. Determine who you want to give an RTT to
5. Pull this group together using:
    - HSTP coordinator for ideas
    - Rider numbers and population maps- pick an area you want to improve ridership
    - Reach out to new groups through Stakeholder Contact Sheet
    - Pick an agency you already work with (may have questions about public transit)
    - Pick a group you want to impact directly (veterans, seniors, housing, etc.)
6. Establish an agency contact to be at RTT and help get people excited about event
7. Determine type of RTT based on audience:
    - For this group will you have more impact as a RTT, Train-the-Trainer, or both?
    - Timeframe to deliver RTT (will this be a one or two-part training?)
8. Use RTT Curriculum to develop RTT:
    - See page 2 of Curriculum* for ideas about Ice-Breakers to use
    - Develop brief System Policies (10 minutes) and Safety Issues (5 minutes) sections
    - Note not to give too much information or overwhelm them
    - Highlight benefits and increased independence
    - Keep this positive
9. Work through your agency contact to get Checklist of Interests to riders to learn about their interests and help plan a fun trip for the Field Travel section of the RTT
10. Schedule date and time for RTT
    - Don't schedule RTT during peak am or pm hours of service
        - Best practices – use Checklist of Interests to find out where they want to go and/or meet with group pre-RTT to gather this information
        - Select best time for the RTT based on group desires
    - Best practices – Field Travel/Fun Trip
        - Ask agency contact to get information about their fun trip out early (at least a month in advance) so they look forward to it and plan for

*[Curriculum](#)

it – and to remind them closer to event

- o Have participants sign up for fun trip to determine size of vehicle to have on hand – so vehicle can accommodate mobility devices, etc.
- o Allow extra time for loading/unloading vehicle
- o Logistics –phone numbers for agency contact, will attendees need to use transit to get home, etc.

11. Make sure vehicle and a driver are available on that day/time
12. Create flyer and share with agency contact
13. Create, update, print, and/or gather materials including:

- Agenda
- Transit Fact Sheets
- Information Release Form
- System brochures
- Rider Guides
- Business cards
- Evaluations
- PowerPoint presentation and/or slides if you will use them – always have back up paper copies even if using PowerPoint

Pack materials including pens, camera, (if using PowerPoint - lap top and projector), etc.

Step 2: RTT Presentation

1. Meet HSTP coordinator, agency contact, and all staff at least 30 minutes early to set up
2. Use RTT Curriculum to co-facilitate with HSTP coordinator and other staff members
   - Hand out materials
   - Ask permission to take photos, explain materials, etc.
   - Give presentation and provide time for questions and answers
   - Get testimonials from attendees
3. After presentation, do evaluation
4. As a group, tour the vehicle, meet driver, see how lift works, and get on the vehicle
5. Field Travel: go on fun trip with interested parties
6. Return to location and end RTT
7. Leave stack of brochures with agency contact

Above all have fun and make it a positive experience for your new riders!

Step 3: RTT Follow up

1. Review evaluations, testimonials, compile results, and follow up within 48 hours of RTT
2. Best practices – Dispatchers:
   - Have dispatchers ask new riders how they found out about the system – was it a

RTT or a referral from an RTT?
- Track information they gather
- Use information for future RTT locations and groups

3. Follow up with agency contact within 48 hours
   - Feedback about RTT
   - What they liked
   - Ways to improve
   - Additional opportunities for Train-the-Trainer for other agency staff members
   - Ideas for future RTTs with other agencies they know
   - Ask them for a testimonial and use this within your internal marketing (see Marketing Plan Checklist for more information)
4. Use materials from Community Transit MAP to continually improve transit system and your customer service/mobility management efforts
5. Final note:
   - After presenting 3-5 RTTs, 5311 provider will transition into presenting RTTs without HSTP coordinator
   - If you need someone in this role, consider implementing a Transit Buddy Program for your system or hiring a mobility manager to assist

See website to access materials: http://www.ecihstp.org/mytrip*

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*http://ecihstp.cuuats.org/my-trip/

Checklist of Interests - General

1. Are there places you want or need to get to (or from) but can't because you lack transportation (whether because you are unable to drive, have to share a car with someone, don't have a car, gas is too expensive, or any other reason)?
   ☐ Yes
   ☐ No
       Additional comments:
       _____

2. Before today, did you know there was a rural public transit system in your county?
   ☐ Yes
   ☐ No

3. If yes, did you know that this rural public transit system was for everyone in the county regardless of their age, level of income, or whether they have a disability or not?
   ☐ Yes
   ☐ No
       If you thought it was for someone else, who did you think it was for?
       _____

4. Have you ever used the rural public transit system?
   ☐ Yes
   ☐ No
       If yes, what kind of trips did you take?
       _____

5. If you were to use the rural public transit system, which of these places might you use it to get to or from? (Check all that apply)

    ☐Work

    ☐Medical appointments

    ☐Visiting friends or family

    ☐Shopping (food)

    ☐Shopping (pharmacy)

    ☐Shopping (general needs)

    ☐Social/entertainment

    ☐Education – community college/college

    ☐Education – Adult Basic Education

    ☐Education - job training

    ☐Volunteering in community

    ☐YMCA or other fitness center

    ☐Kid's activities (pool, park, skating rink, sporting events, etc)

    ☐Senior nutrition or day center

    ☐Social service agency appointments

    ☐Religious

    ☐Other: _____

6. How much do you know about the rural transit system in your area? (Circle one)

1	2	3	4	5
Nothing		Some		A lot

7. Why might you use the rural public transit system?
    (Check all that apply)

    ☐Convenience of not driving myself

    ☐Cheaper than driving

    ☐Unable to drive

    ☐High fuel prices

    ☐Personal vehicle unreliable

    ☐Environmental reasons

    ☐Other:_____

    ☐Make new friends on the transit vehicle

    ☐Avoid the stresses of driving

    ☐Safety issues: not having to drive after dark or winter driving

    ☐Car ownership is too expensive

    ☐Get rid of second car

8. What would keep you from using rural public transit?
    _____

9. Would you ever ride rural public transit for a fun trip?
    ☐Yes
    ☐No

    If Yes, where would you like to go?
    _____

    If No, why not?
    _____

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10. If you were to use public transit for a fun trip, what time would work best for you?
☐ 8am -11am
☐ 11am – 2pm
☐ 2pm – 5pm

11. List your top three favorite attractions to visit in your county. (Examples: movie theater, downtown locations, park, shopping center, etc.)

    1. _____

    2. _____

    3. _____

Checklist of Interests – Train the Trainer

NAME: Click here to enter name.

AGENCY: Click here to enter agency name.

CONTACT: Click here to enter contact.

1. Before today, did you know there was a rural public transit system in your county?
   ☐Yes
   ☐No
   Additional comments:
   _____

2. If yes, did you know that this rural public transit system was for everyone in the county regardless of their age, level of income, or whether they have a disability or not?
   ☐Yes
   ☐No
   If you thought it was for someone else, who did you think it was for?
   _____

3. Have you ever used the rural public transit system?
   ☐Yes
   ☐No
   If yes, what kind of trips did you take?
   _____

4. Have your patients (that you know of) ever used the rural public transit system?
   ☐Yes
   ☐No
   If yes, what kind of trips have they taken?
   _____

5. How much do you know about the rural transit system in your area? (Circle one)

1	2	3	4	5
Nothing		Some		A lot

6. How much did you know about coordination prior to this meeting?

1	2	3	4	5

7. Are there places patients wanted or needed to get to (or from) but couldn't because they lack transportation (whether because obstacles exist and were unable to drive, had to share a car with someone, didn't have a car, gas was too expensive, or any other reason)?

☐Yes

☐No

   Additional comments:

   _____

8. If your patients were to use the rural public transit system, which of these places might they use it to get to or from? (Check all that apply)

☐Work

☐Medical appointments

☐Visiting friends or family

☐Shopping (food)

☐Shopping (pharmacy)

☐Shopping (general needs)

☐Social/entertainment

☐Education – community college/college

☐Education – Adult Basic Education

☐Education - job training

☐Volunteering in community

☐YMCA or other fitness center

☐Kid's activities (pool, park, skating rink, sporting events, etc)

☐Senior nutrition or day center

☐Social service agency appointments

☐Religious

☐Other: _____

9. Why might your patients use the rural public transit system? (Check all that apply)

☐Convenience of not driving yourself

☐Cheaper than driving

☐Inability to drive

☐High fuel prices

☐Personal vehicle unreliable

☐Environmental reasons

☐Other:_____

☐Make new friends on the transit vehicle

☐Avoid the stresses of driving

☐Safety issues: not having to drive after dark or winter driving

☐Car ownership is too expensive

☐Get rid of second car

10. Could you ever see a patient gathering/orientation wanting to take a fun rural public transit trip as part of travel training?

Yes

No

   If yes, where would they like to go?

   _____

   If No, why not?

11. If a group of patients were to use public transit for a fun trip, what time would work best for your group?

☐ Mornings (8am -11am)

☐ Early Afternoon (11am – 2pm)

☐ Late Afternoon (2pm – 5pm)

☐ N/A

☐ Other: _____

12. List the top 3 attractions to visit in your county (Examples- movies, museum, park):

1. _____

2. _____

3. _____

13. What transportation barriers have you experienced when meeting patient's needs? What might keep you from using rural public transit or recommending it to a patient?

14. Do you currently have patient trip planning (or something similar) to meet their medical needs? Do you ever plan for trips outside of medical appointments?

15. What transportation issues do you see emerging for your patients?
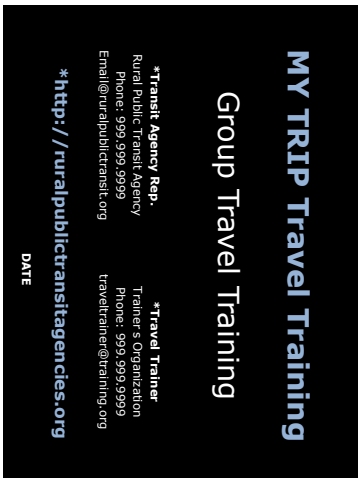
16. When is the highest appointment or intake time? What is the most difficult appointment issue to meet mobility needs?

17. Are you aware how First Transit brokers Medicaid funding for non-emergency medical transportation? Would you like to learn more?

18.Would your patients benefit from a "Transit Buddy" – a volunteer program to help people learn how to use public transit?

19. Do you have a patient outreach process?

Group Rural Travel Training Curriculum

Handout	PowerPoint Slide / Main Points	Purpose & Content	Additional Considerations
	Classroom Time (25 to 35 Minutes)		
	Introduction, Agenda, & Ice-Breakers (10 minutes)		
Materials Checklist: Handouts Laptop Projector Thumb drive Electrical Cords/Tape Backup plan	**MY TRIP Travel Training** Group Travel Training *http://ruralpublictransitagencies.org* *Transit Agency Rep. Rural Public Transit Agency Phone: 999.999.9999 Email@ruralpublictransit.org* *Travel Trainer Trainer's Organization Phone: 999.999.9999 traveltrainer@training.org* **DATE**	**Introduction** Trainer explains their interest in transportation, current job duties, and previous experience.	In many locations, a PowerPoint presentation will not be possible. If desired, print out the PowerPoint and ask participants to follow along or use other handouts.
Project/ Agency Overview Sheet Agenda	**Introductions** ■ **Review Agenda** (see handout) Start & Ending Time ■ **Let's go around the room, everyone say...** Name Where you are from Say something that is interesting about yourself.	**Agenda** Explain the purpose of the "Classroom" and "Field Travel" portions of the training. Briefly explain the Field Travel destination. **Introductions** Discover participant interests. Find out how their interests relate to public transit. If they don't, that's okay, don't try to force it. Be yourself; don't be robotic or sound too scripted.	People generally like to talk about themselves. Find out what interests the participants may have. Establishing good rapport early on will provide a foundation to build upon for the travel training.

Handout	PowerPoint Slide / Main Points	Purpose & Content	Additional Considerations
	Group Discussion • Organize into small groups. (preferably 3 to 4 people). • Discuss a transit related question. • The travel trainer will walk around and answer questions. • Share discussions with the group.	**Transportation Ice-Breakers –** Everyone says their name, where they are from, and answers the question on the slide. Examples of a time when: car broke down; leg was broken; you could no longer drive; or you did not have a license or a car. Refer to the table at the end of the RTT Curriculum for more ice breaker examples.	While group is discussing, move from group to group to facilitate discussions. Take notes and use what you learn in the "Benefits to the Participants" section of the training. People may be reluctant to share responses. By taking notes you will have a list of opinions to share with the rest of the group. This may inspire them to speak when they hear the idea being spoken of.
		Benefits to the Participants (2-5 minutes)	
	What will you get from this presentation? • Become familiar with the transit system. • You will be provided with the necessary tools to successfully use public transit, wither for you or someone else you may know. • Another form of transportation • Alleviate any concerns that you may have about using public transit. • A free trip!	Participants will become familiar with the transit system(s). Participants will be given resources and tools for themselves or for others who may benefit from public transit. Participants will be provided with alternative transportation options. Training will help to alleviate concerns individuals may have with using public transit. They'll receive a free trip!	Take this time as an opportunity to discuss the many benefits of using public transit. You are a salesperson: **SELL IT!** Integrate responses from the ice-breakers into this section. During the ice-breakers people will discuss what is important to them. Cater to their interests.

System Policies (10 minutes)

| Rider Mobility Guide & other public transit materials | **Rural Public Transit System Polices**

■ **Agency s History**
■ **Service Area & Out of County Trips**
■ **Rider Mobility Guide**
  ○ Medicaid First Transit Issues
  Scheduling, Fares, & Staff
  Accessibility & Accommodations
  Mobility Aids | Provide the following:

- Brief history of transit system,
- Service area,
- Fare structure,
- Reservation notice,
- Late cancellation/no show policies,
- How to transfer to adjacent transit systems,
- Possible sources for funding,
- Route type(s),
- Operating/dispatch hours,
- Eligibility requirements,
- Arrival/departure guidelines,
- Service animals,
- Passenger aids,
- Passenger complaint procedures, and
- Passenger conduct. | Do not give too much information; People will only retain so much information.

Objective here is to plant a seed. Get participants to begin considering public transit as an option and provide them with the necessary information to successfully request a ride. |

Safety Issues (2-5 minutes)

Safety Issues
 	
▪ **Emergency Procedures & Policies**
▪ **Inclement Weather**
  Procedures
  Notifications
▪ **Emergency Contacts** (optional)
▪ **Rider Behavior Expectations**
▪ **Reporting Suspicious Activity**
	Explain what to do if the rider witnesses suspicious activity. Discuss what to do if the driver shows unsafe behavior. (Explain that the drivers are well-trained.) Provide guidance on what to do if the participant misses the transit vehicle, the transit vehicle doesn't arrive at the scheduled time, the participant is running late, etc.	Reassure riders about the safety of the system – eliminate unnecessary worry (don't give rare examples of emergencies.) Acknowledge rider concerns. Explain how the transit staff is prepared to handle situations. Turn fear into something positive. For example instead of, "I have never used public transit in my life. I'm afraid" becomes: "I am excited to learn something new that will give me greater independence."

Field Travel (1 hour to 1 ½ Hours)

	Vehicle Tour & Trip (1 hour to 1 1/2 hours)	
	Get participants comfortable with the transit vehicle Meet a driver Questions & Answer Session Fun Group Trip	Show how the wheelchair lift and restraints work; explain the transit systems policy for wheelchairs. Discuss frequently asked question regarding wheelchair accessibility. While participants are enjoying their ride, take this opportunity to think of anything that may have been missed during the classroom training. Above all, let participants enjoy their ride!	Use the ride as an educational opportunity, but do not overload the amount of information given. Total time spent at the destination should not exceed 1 hour, unless a specific event is being held. Choose a destination that is appropriate for all participants. Assess the following beforehand: - Path of travel; - Vehicle used and available seating (If possible, use a mini-bus not a van); and - The destination's environment.
	Return Trip & Wrap Up (Time dependent on distance of and time spent at the destination)	
		Offer a free ticket for their first solo ride or try to sell them a discount ticket booklet, if applicable. Provide participants an evaluation form for feedback on improving future trainings.	Be mindful of the participants' time and utilize the return trip to answer as many questions as possible.
Evaluation	Allow the participants to evaluate the training. Conduct a follow-up with the host agency within 48 hours after the training.	

Below are additional questions that could be asked during the Ice-Breaker segment of the training.

- Have you ever used public transit? Was it rural or urban? How was your experience?

- Do you think you will have to stop driving at some point? If so, how do you think you will get to church, work, grocery store, visiting friends and family, shopping, etc?

- Would anyone here like to save on fuel or drive their vehicles less?

- Who enjoys scraping ice in the winter or driving on icy roads? Or driving after dark? Wouldn't it be nice to get picked up by a warm vehicle (winter) – cool vehicle (summer)?

- What are some benefits of using transit? (Have a list of benefits ready in case participants can't think of any.)

- Do you know anyone that might benefit from public transit? Explain how.

- If something happened to your vehicle tomorrow, how would you get where you need to go? If you have to depend on family or friends, would you rather travel independently?

- Think of a time in your life when needed to get someplace but couldn't. How did this make you feel? (If this question is asked, it may be better to have them think about it rather than respond to it.) You might end this by saying that some people feel like they are stuck or trapped, unable to get where they want and need to go. The benefit of public transit is being able to get where you want to go independently – when you want to go.

Rural Travel Training Agenda

Click here to enter the Transit System.

Click here to enter county name.County – HSTP Region Click here to enter HSTP region #.

DATE: Click here to enter the date of the event.

TIME: Click here to enter time.

PRESENTERS:

Click here to enter name.– Transit Director Click here to enter the Transit System. Public Transit System

Click here to enter name.– Dispatcher Click here to enter the Transit System. Public Transit System

Click here to enter name.– HSTP Region Click here to enter the Transit System. Coordinator

AGENDA:

1. Presenter introductions
2. Rural Travel Training overview
   a. Purpose of Rural Travel Training
   b. "Classroom" vs. "Field Trip" portions
   c. Benefits of Rural Travel Training for participants
3. Introductions of group members and "Ice Breaker" activity
4. Click here to enter Transit System. Public Transit System overview (See "The Basics about Public Transit in your County")
5. Discussion/Questions
6. Evaluation of Rural Travel Training
7. Vehicle tour and fun trip to Click here to enter prior agreed upon location

Information Release Form
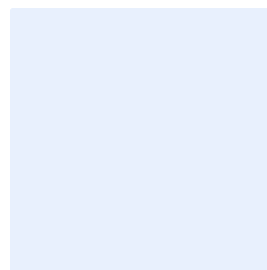
We need people like you to *tell others* about the need for public transportation in rural areas, so they can think about their own needs for rural public transportation. *Please answer the following questions for yourself or those you care about:*

1. Has a lack of transportation affected your life? If so, how?

2. How could better access to transportation improve your life?

3. What might your family do with better access to transportation?

Permission:	Yes	No	Initials
Permission to use written statements.			
Permission to use first name to identify you.			

I grant permission to the Click here to enter county name.*County Transit Advisory Group or* Click here to enter Transit System.*to use this information for education and outreach purposes only. You will only be identified by first name.*

Signature of Participant _____ Date _____

Participants under 18 years of age:
I grant permission to the Click here to enter county name.*County Transit Advisory Group or* Click here to enter Transit System. *to use my daughter/son's information for education and outreach purposes only. They will only be identified by first name.*

Signature of Parent or Guardian _____Date_____

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Sign-In Sheet / Photo Release Form

Please sign below to indicate you are attended this Rural Travel Training. Write your initial next to your signature to allow the Rural Travel Training staff to take photographs and/or video of you during the presentation.

Images will be only be used for education and outreach purposes

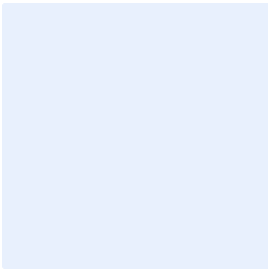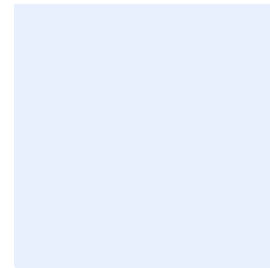| PHOTO AGREEMENT		
Signature	**Initial**	**Date**
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15.		

The Basics about Public Transit in Your County

Who:	Click here to enter Transit System.Public Transit
What:	Public transportation for all people in Click here to enter county name. County - any reason
Where:	Transportation provided all over Click here to enter county name. County
When:	Hours of Service {Monday to Friday Click here to enter time.am to Click here to enter time. pm, Saturday and Sunday Click here to enter time. am to Click here to enter time. pm)
Why:	Riders should be able to get places they need and want to go
Cost:	Cost of fare, one way trip is: $Click here to enter fare cost.
Additional information:	Anything else riders may need to know (ages, exact change, special trips, window of time, etc.)
Call in advance:	Click here to enter number of hours.hour advance reservation is required. Same day requests may be possible if space permits, but not guaranteed.
Dispatch hours:	Monday to Friday Click here to enter time. am to Click here to enter time. pm, Saturday and Sunday Click here to enter time. am to Click here to enter time. pm
Number:	Click here to enter contact number.

How to Use Rural Public Transportation
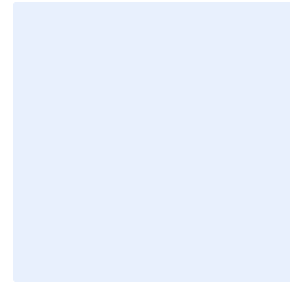
1. Call county/city public transportation dispatch office Click here to enter phone number.
2. State your transportation need:
    A) Where you need to be picked up
    B) Where you need to go
    C) Time you need to be picked up
    D) If you need a return trip
3. Dispatch staff will schedule trip
4. Day of trip, you will be picked up at your location within window of time specified by the transit system
5. Pay your fare as you board vehicle (unless another arrangement has been made for payment)
6. Go to trip location
7. If you scheduled return trip, vehicle returns for you within window of time specified
8. Pay fare as you board
9. Go to trip location

Best Practices: Trainer Survival Checklist

☐Phone number for all contacts

☐Cell phone

☐Large print and Braille materials

☐Handouts/print outs
    ☐RTT curriculum
    ☐RTT agenda
    ☐3 Steps for a Successful RTT
    ☐Checklist of Interests (completed in advance)
    ☐RTT flyers (posted in advance)
    ☐Extra transit system brochures
    ☐Rider policies
    ☐Sign-in sheet
    ☐Information Release forms
    ☐RTT Evaluations
    ☐Transit fact sheets
    ☐Business cards/contact information
    ☐The Basics About Public Transit in Your County
    ☐How to Use Rural Public Transportation

☐Comments from others who benefited from RTTs
    ☐Visual aids needs
    ☐Visual guides and reminders for presenters
    ☐Clock (start on-time and try to end early)

☐Other materials:
    ☐Camera
    ☐Back up thumb drive of materials
    ☐Brochures & information on all regional providers
    ☐Extra pens
    ☐Note paper

Best Practices: Additional RTT Considerations

1. **Fielding a training request or outreach to set up an event**

   Initial Information
   - Audience: demographic(s), size, interests/group/individual history
   - Event, location, and date(s)
     o Coincide with regularly scheduled meeting or event for better turn out
   - Background
     o Checklists of Interests (Pre-Evaluation)
     o Establish relationship with contact/advocate/Transit Buddy – call contact to gain sense of group or individual needs
     o Does anyone need a translator, interpreter, and/or Braille materials?
   - Confirm provider or other co-facilitator and discuss presentation
   - Define purpose of RTT and issues that will be covered
   - Confirm time, preparation, materials, and/or expenses of event
   - Marketing/outreach – have partners publicize event, title of event, fliers, other outreach
   - Get count for RTT and fun trip
   - Verify vehicle size available will meet fun trip needs – vehicle can accommodate the number of people using mobility devices

   Training Considerations
   - Format: How many people will be co-facilitating? What kind of setting: Group? Individual? Train-the-Trainer?
   - Are there any insurance or liability concerns to be aware of for any presenters? Are there any waivers that need to be signed? Background checks? Normal procedures that should be followed according to transit system policies and procedures?
   - Other presenter's abilities/needs/limitations/commitments
   - Length of presentation and adequate time for transition to vehicle or bathroom breaks
   - Check for prior misunderstandings that may arise, dispel myths, and find common ground

2. **Planning the Presentation**

   Curriculum Considerations
   - Is there and incentive behind attendees attending the RTT:
     o Free fun trip?
     o Part of normal group meeting?

- - Are they motivated to participate in the meeting because of a travel need they or a loved one has?
  - Ice Breaker -
    - Consider how will you get the group to participate/warm up?
    - As a presenter, what is your story? Have you ever been without transportation?

Training Format(s)
- Interactive exercises, discussions
  - Are you giving the group or individual enough time to ask questions?
  - Is the environment interactive?
  - Inviting for people to share information?
- Small group/large group learning options?
  - Are you giving different learners and personalities different options to speak in large group or small group?
  - Are you seeking individual feedback?

Audience Considerations
- Demographics/experiences
  - What can you learn from the Checklist of Interests about past experiences?
  - How will you address issues that come up in response to those?
- What kind of technology will you use (if any) and what is your back up if it fails?
- How can you meet the needs of people with different disabilities? Are your materials accessible? Do you have large print materials for people with low vision?

Venue
- Room configuration: pay attention to the size and features (including acoustics) – find ways to limit obstructions
- Seating needs – try to present so that people are comfortable and can ask questions easily
- Adequate lighting
- Will you have access to RTT room for set-up?
  - How much time or assistance do you need?
- Is the room accessible? Is the path of travel to the transit vehicle accessible and easy to access by people using mobility devises?
- Be aware of weather conditions as they may relate to the RTT or fun trip

3. **On-Site Considerations**
   Equipment/Materials Needed:

- Handouts – Copies of all materials as listed in Trainer Survival Checklist and Curriculum

Support

- Phone numbers for all contacts and/or presenters/providers etc.
- Know how to get to RTT location and the location of the fun trip
- Backup plan – What is your "Plan B"?
  - o What will you do if something doesn't go as planned?
  - o Have all parties agreed upon this?

Evaluation Considerations

- When will you distribute and collect the RTT Evaluation?
- Who is responsible for follow up on items that arise at RTT?

Group Travel Training Evaluation

LOCATION: Click here to enter the training location.

DATE OF TRAINING: Click here to enter the date of the event.

1. Was the information provided easy to understand?

   ☐Yes   ☐No

2. Do you feel more comfortable using public transportation after the RTT?

   ☐Yes   ☐No

3. Will this training encourage you to use rural public transit more?

   ☐No - I do not plan to use public transit
   ☐No - My use of public transit will remain the same
   ☐Yes - I will use public transit more often

4. How would you rate the overall quality of this training?

   ☐Very Low   ☐Low   ☐Average   ☐High   ☐Very High

5. What did you find most helpful about this training?

6. What did you find least helpful about this training?

7. Other comments:

Transit Fact Sheet

Click here to enter Service Area.

Why is public transportation important for Click here to enter Service Area. in rural areas?

- Click here to enter text about what people are facing in the Service Area.

- Click here to enter text about what people are facing in the Service Area.

> *Click here to use a quote from the document or summarize an interesting point.*

What are the Click here to enter Service Area. benefits?

- Click here to enter benefit.
- Click here to enter benefit.
- Click here to enter benefit.
- Click here to enter benefit.
- Click here to enter benefit.
- Click here to enter benefit.

Transportation Resource Information

Click here to enter Transit System. provides general public transportation throughout the county for all ages. It's for everyone!

Contact us at Click here to enter phone number. for questions about how we could serve you.

Riders can contact our Transit Buddies at the same number to become more comfortable with using the transit system.

Use completed Service Information Sheet or Rider Guide for other things to include here that is relevant to this population.

{Last Modified Click here to enter a date. }

Click here to enter Transit System.

- o Click here to enter phone number.
- o Click here to enter days of service.
- o Click here to enter hours of service.
- o Click here to enter cost of fares for all ages.
- o Click here to enter website.
- o Click here to enter Service Area.

Things to Know

We will pick riders up at their home, work, or any other location in the county.

Riders should:
- o Call 24 hours before needing a ride to schedule trip and return trip.
- o Be ready 15 minutes before scheduled pick-up time.
- o Have exact fare ready when they get on vehicle.
- o Call with questions.

Last Updated: Click here to enter a date.

Transit Buddy Guide

Click here to enter county. County

Welcome and thank you for your interest in the Transit Buddy Program!

There are so many different ways to help people learn how to use public transportation. Just imagine your satisfaction volunteering as a:

- **Transit Tutor:** answering a call from a young mother and helping her plan how to use public transportation to drop her child off at daycare before heading to work.

- **Transit Rider-Guide:** riding with an older man on a Click here to enter Transit System. vehicle from his home in a rural area to a nursing home to visit his wife for the first time.

- **Transit Tour-Guide:** riding on the transit vehicle and showing groups the most important things they need to know about how to use the system.

- **Transit Celebrity:** speaking to a group of ministers and explaining how easy it is for their congregation to get to the grocery store using public transportation.

- **Transit Advocate:** working an information booth at a local event at the community college and helping to spark someone (young or old) to go back to school to take classes because they will have transportation to get there.

You have the ability to help people right here in our community become more independent. As a Transit Buddy, you will meet a variety of people ranging from those needing little assistance to those needing more extensive training. For some, they may only require a friendly voice on the phone to ease their concerns about using public transportation, while others may need more encouragement to help them get where they need to go.

By teaching people how to confidently use public transportation you will undoubtedly have a positive impact on their lives by helping them understand what Click here to enter Transit System. could mean for them and their lives.

Your primary role will be to explain to potential riders:
- That rural public transportation is a reality and what it looks like in a rural area.
- That the Click here to enter Transit System. goes throughout the entire county.
- The hours of service transportation is available.
- How much it costs.

- How to schedule a ride and a return trip.
- How soon to call in advance to schedule a ride.
- How much more independence they can have by using public transportation.

Your involvement as a Transit Buddy volunteer will greatly enhance the lives of people right here in Click here to enter county name. County.

Transit Buddies Orientation Packet

You likely have many questions about the Transit Buddies Volunteer Program.   Be assured that your Transit Buddy Volunteer Coordinator (Click here to enter name. / Click here to enter phone.) is available to answer any questions you might have throughout your training, as well as once you're an official Transit Buddy.

Who will I help?

You'll be working with people from Click here to enter county name. County who have questions about how to use Click here to enter Transit System. including seniors, people in rural areas, people with disabilities, people with low income, youth, and people with medical needs, and others.

We will rely on you to treat all potential riders with patience and respect, understanding that public transportation can be a new experience for many of them. Therefore, we want to make the Transit Buddy Program a friend they can turn to when they have questions. Your ultimate goal is to help people gain independence as public transportation riders.

What will I do as a Transit Buddy?

We currently have five different ways you can volunteer as a Transit Buddy. You can do just one or any combination depending on your comfort level:

1. **Transit Tutor**
   Answer questions from potential riders over the phone, at the Click here to enter Transit System. office, or another agreed-upon public location, like the local library, and explain to them what they need to know to use the public transit system.

2. **Transit Rider-Guide**

Escort the rider on-board a Click here to enter Transit System. vehicle to show them how to ride and ease their travel jitters.

3. **Transit Tour-Guide**
    Ride on the transit vehicle and show groups the most important things they need to know about how to use the system and how easy it is to use.

4. **Transit Celebrity**
    Click here to enter Transit System. gives local presentations to potential riders about their system and its policies. Your role as a Transit Celebrity is to share your stories to get them interested in public transit and explain what it could mean for their lives.

5. **Transit Advocate**
    With your enthusiasm and knowledge about using the rural transit system Click here to enter county name. County you can tell others about the system at local meetings and/or an information booth at event fairs.

After training and orientation, all Transit Buddies will understand:

- How public transportation is provided in a rural area – demand response (or deviated fixed route) instead of a fixed route with bus stops.
- What public transportation looks like in a rural area – smaller vehicles, sometimes minivans.
- Where the Click here to enter Transit System. goes throughout the entire county (and any other places it travels/when).
- The hours of service public transportation is available.
- How much it costs for a ride for all ages.
- The phone number people call to schedule a ride.
- How to schedule a ride and a return trip.
- How soon riders need to call in advance to schedule a ride.
- How to explain to others how to use the transit system and give advice on other things they need to know to help the potential rider become a successful rider.

We expect all Transit Buddies to:

- Be able to pass a background check to ensure safety of riders.
- Learn everything they can about the local public transportation system.

- Share a positive attitude about the benefits of public transportation and what it can mean for potential riders.
- Be patient.
- Use good customer service skills.
- Listen and follow instructions.
- Communicate clearly.
- Encourage potential riders as they become more independent.
- Adhere to all local, state, and federal laws while volunteering.
- Have fun!

You will work directly with the Click here to enter Transit System. volunteer coordinator to make this opportunity a win-win for your schedule and level of interest.

Note for development of Transit Buddies Guide:

All Transit Buddies will need to have orientation and training on the transit system as a whole, similar to that given to a new employee, plus they should spend time with the dispatchers and schedulers to see how rides are scheduled and learn proper customer service for working with riders. In addition, Transit Buddies should be asked to schedule a ride from their home (preferably free of charge) to another location so that they have the direct experience of riding the vehicle and using the system.

The transit system should provide the Transit Buddies with an information sheet with all of the important information in one place. The volunteer coordinator should role play and work with the Transit Buddies to ensure a deep understanding of the system.

1. **Transit Tutor**

    Answer questions from potential riders over the phone, at the Click here to enter Transit System. office, or another agreed-upon public location, like the local library, and explain to them what they need to know to use the public transit system.

    Need to work with the public transit system to outline things that Transit Tutors should be aware of including where to meet potential riders, protocol for answer call-in questions from potential riders. And make sure they understand safety issues.

2. **Transit Rider-Guides**

    Escort the rider on-board a Click here to enter Transit System. vehicle to show them how to ride and ease their travel jitters.

Need to work with the public transit system to outline things that Transit Rider-Guides should be aware of including general information Transit Tutors receive. And make sure they understand safety issues. Additional information might include to not go inside someone's home, to stay on the transit vehicle as it goes to pick up the riders, and that their ride is free. Would be nice for the system (if possible) to pick the Transit Rider –Guide up at their home and drop them off at the end of their day and possibly line up several riders to make the best use of the Transit Rider-Guide's time.

Riders may from time to time ask you to hold their personal belongings such as groceries or a coat. If you like, you may help them in this way, but are not required to do so, you can always gently tell the rider no. If an item is too heavy for you, do not attempt to lift. Riders may have personal assistants to accompany them in some of their daily activities. These assistants are able to ride the transit system for no fare! You can help educate the rider about this option and train the assistant as well.

What should I take with me?

Transit system needs to know this:
The transit system will provide you with pen, paper, and transit buddy tracking form for you to document each rider.

It is recommended to carry a cell phone with you as a Transit Rider-Guide. <u>Please put</u> Click here to enter Transit System.'s<u> number into your phone.</u> The number is Click here to enter phone number.. This way if you need clarification from the transit system or need assistance with a situation you are able to call the appropriate people. It may also put the rider at ease to know that you are able to contact someone if questions come up. Please note, that the driver is also in contact with dispatch and can likely provide assistance if needed. If you do not have a cell phone please let the transit system know so arrangements can be made.

3. **Transit Tour-Guide**

Ride on the transit vehicle and show groups the most important things they need to know about how to use the system and how easy it is to use.

The Transit Tour Guide will need to know everything that a Transit Rider-Guide does plus act as a Transit Celebrity and receive training in the information Transit Tutors receive and they must understand safety issues.

4. **Transit Celebrity**

Click here to enter Transit System. gives local presentations to potential riders about their system and its policies. Your role as a Transit Celebrity is to share your stories to get them interested in public transit and explain what it could mean for their lives.

Need to work with the public transit system to outline things that Transit Celebrity should be aware of including general information Transit Tutors receive. And make sure they understand safety issues.

5. **Transit Advocate**

With your enthusiasm and knowledge about using the rural transit system in Click here to enter county name. County you can tell others about the system at local meetings and/or an information booth at event fairs.

Need to work with the public transit system to outline things that Transit Advocates should be aware of including general information Transit Tutors receive. And make sure they understand safety issues.

They should have handouts and other marketing materials the system uses for public outreach. In addition, all contact numbers in case a question comes up.

Communication Guidelines

Since you will be working with a wide variety of people including people who have disabilities, let's review a few guidelines for effective communication.

1. **Speak normally.**
    Don't feel the need to talk louder or slower than what is normal. Never assume because someone has one disability that they also have a mental disability or are a slow learner.

2. **Think "person-first"** regarding people with disabilities.
    Just like you, they are people with many characteristics that make up who they are and a disability is just a small part of it. The person <u>always</u> comes before the disability. Instead of calling someone a "blind person", you should refer to them as a "person who is blind".

3. **Be aware of personal space and belongings.**

People that use wheelchairs, walkers, canes, etc. view these aids as part of their personal space. Do not touch, lean on, or use these devices for carrying your personal belongings. People using these aids are not "bound" or "confined" to it. These aids grant them a freedom of movement that they would otherwise not have.

4. **Never make assumptions about what a person can or cannot do**.
   A person with a disability is the best judge of their abilities. <u>Always ask</u> before assuming the person needs your assistance. Let them tell you how you can help.

5. **If you make a mistake, apologize, learn from it and move on.**
   If you haven't worked with many people that have disabilities, you may be concerned about embarrassing them or yourself. We're all people. Just relax and remember that your job is to help them become more comfortable with using the transit system. Be respectful and you'll be fine.

The following are words with negative connotations. Please avoid using the following terms or phrases when referring to a person with a disability:

- *Afflicted with or by…*
- *Blind as a bat*
- *Disabled*
- *Homebound*
- *Pitiful*
- *Poor or the unfortunate*
- *Stricken*

- *Victim*
- *Differentially able*
- *Lame*
- *Spazz*
- *Referring to anything that isn't a disability as being "normal"*

As Transit Buddies, let's keep our words positive when we communicate with (and about) all of our potential riders, whomever they are. You can use this chart to help select better terms to use when referring to someone with a disability.

Negative Terms ☹:	Positive Terms ☺:
Birth Defect	Person who is disabled since birth, born with a congenital disability
Cerebral Palsied	Person who has cerebral palsy
Cripple	Person who needs mobility assistance
Deaf and Dumb, Deaf Mute	Person who is deaf and does not speak
Deformed	Person who has a physical disability
Emotionally Disturbed	Person with an emotional disability
Handicapped	Person with a disability
Hunchbacked	Person with a spinal curvature
Insane, Deranged, Deviant	Person with a mental illness
Midget, Dwarf	Person who is small in stature
Mongoloid	Person who has Down Syndrome
Normal	Non-disabled, able-bodied
Retarded	Person with a cognitive disability
Wheelchair bound, confined to a wheelchair	Person who uses a wheelchair

Safety Guidelines

Work with the public transportation system to institute some general procedures and safety guidelines for the Transit Buddies Program. For instance: not going into someone's home, not giving out their personal phone number, only meeting in a public location. These are not meant to scare anyone out of volunteering, but to keep our volunteers and the potential riders safe.

In addition, for the safety of the rider, the Transit Buddies must be able to pass appropriate background checks. This is something the transit system should put into effect.

Transit Buddy Program Contacts

Click here to enter Name.

Click here to enter Transit System.

Click here to enter Transit Buddy Volunteer Coordinator.

Adress: Click here to enter address.

Phone Number: Click here to enter phone number.

Click here to enter Name.

Click here to enter Transit System.

Click here to enter Transit Buddy Volunteer Coordinator.

Adress: Click here to enter address.

Phone Number: Click here to enter phone number.

Conclusion

Just the Beginning

Thank you for joining us on this journey thus far!

We feel MY TRIP was very successful as a pilot project and that the Community Transit MAP is an excellent toolkit to begin to improve transit services on behalf of the rider. Whether you are a new or well-established public transit system, effective customer service should always be your top priority. Though utilizing tools included in the Community Transit MAP you should be able to refine your customer service efforts to better meet your riders' needs. We encourage you to use these tools, make them your own, and we can all continue improve the experience of our rural riders.

Looking to the Future

It is our hope as we look to the future that we can venture beyond MY TRIP because the Community Transit MAP was developed over two short years and cannot possibly fill every need that mobility managers or rural transit systems may wish to address.

As far as next steps, over the next few months we hope to develop a comprehensive planning strategy to outline the most effective way to utilize the toolkit for its replication throughout rural areas. By doing this, we would like to ensure that mobility management and rider-focused service is a permanent part of all federally funded transit system's vision, mission, and services.

Finally, over the next few years we hope to continue to refine MY TRIP tools with transit systems throughout the state and to share our materials with interested parties throughout the country so that all potential rural riders can become successful rural transit riders.

We will post additional resources on the MY TRIP website:
http://www.ecihstp.org/mytrip*

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*http://ecihstp.cuuats.org/my-trip/

Rider Survey

This is a short two page survey about how Click here to enter Transit System. *is serving its riders. For multiple choice questions below (a,b,c) please circle all that apply. Thank you for taking the time to provide your feedback!*

1. **Where in** Click here to enter Service Area.**do you live?**
   _____

2. **Where do you typically ride to/from using** Click here to enter Transit System.**?**
   a. Work
   b. Medical Appointments/Dialysis
   c. School/Education
   d. Shopping
   e. Social/Recreation
   f. Other: _____

3. **How often do you use** Click here to enter Transit System.**?**
   a. Less than once a month
   b. About once a month
   c. About once a week
   d. 2-3 days a week
   e. 4-5 days a week

4. **Has** Click here to enter Transit System. **improved your access to services that you need?**
   a. Yes
   b. No
   f. Other: _____

5. **Are there obstacles that prevent you from using this service more often?**
   a. Cost of fares

   c. Advance reservation timeframe
   d. Need someone to ride with me
   e. Personal health reasons / disability
   f. There are no obstacles
   g. Other: _____

6. **Does someone in your household have a car?**
   a. Yes
   b. No

7. **If** Click here to enter Transit System. **was not available, how would your transportation needs be met?**
   a. Someone else would drive me
   b. Walk, bike, or use a mobility device
   c. Drive myself
   d. Taxi cab
   e. Would not make the trip
   f. Other: _____

8. **How did you find out about this service?**
   a. Brochure
   b. Advertisement / Newspaper
   c. Family or friend
   d. Word of mouth
   e. School
   f. Community Center
   g. Website
   h. Other: _____

9. Have you ever used the Click here to enter Transit System. website?
   a. Yes
   b. No

10. What is your overall satisfaction with Click here to enter Transit System. transportation services?
   a. Very satisfied
   b. Satisfied
   c. Unsatisfied

   d. Very unsatisfied

11. Please help us improve our service by completing this statement. "I would Click here to enter Transit System. more often if..."
   _____
   _____
   _____
   _____
   _____

12. Please rate Click here to enter Transit System. handling of the following issues below by circling 0 – 5.

Transit Customer Service Issue	N/A	Poor		Fair		Excellent
The timeliness of the public transit system vehicle.	0	1	2	3	4	5
The attitude of the driver.	0	1	2	3	4	5
The attitude of the dispatcher.	0	1	2	3	4	5
The ease of finding public transit system information.	0	1	2	3	4	5
The cleanliness of the public transit system vehicle.	0	1	2	3	4	5
The ability to connect to other transit agencies.	0	1	2	3	4	5
The affordability of the service.	0	1	2	3	4	5
The ease of scheduling rides.	0	1	2	3	4	5
13. From the transit customer service issues listed above, what are the most important to you?						

The following demographic questions below are optional.

9. What is your gender?
   a. Male
   b. Female

10. What is your ethnicity? (Circle all that apply)

   a. African-American
   b. American Indian
   c. Asian
   d. Caucasian
   e. Latino
   f. Other: _____

11. What is your employment status?

a. Full-time employed
b. Part-time employed
c. Stay-at-Home Parent or Caregiver
d. Student
e. Retired
f. Unemployed
g. Other: _____

12. What level of education have you completed?

a. High school / GED
b. Some college
c. Associate's Degree / Trade School
d. Bachelor's Degree
e. Master's Degree or higher
f. Other: _____

13. What is your yearly household income?

g. Less than $10,000
h. $10,000 to $29,999
i. $30,000 to $44,999
j. $45,000 to $59,999
k. $60,000 to $74,999
l. $75,000 or higher

14. What is your age?

m. Under 18
n. 18 – 24
o. 25 – 34
p. 35 – 44
q. 45 – 54
r. 55 – 64
s. 65 – 74
t. 75 – 84
u. 85+

Non-Rider Survey

This is a short two page survey about how Click here to enter Transit System. *is serving its riders. For multiple choice questions below (a,b,c) please circle all that apply. Thank you for taking the time to provide your feedback!*

1. **Have you ever heard of** Click here to enter Transit System**?**
   a. Yes
   b. No
   c. If yes, where did you hear about it?
      i. Group presentations
      ii. Phone calls
      iii. Television or radio announcements
      iv. Public meetings
      v. Family or friends
      vi. School
      vii. Click here to enter Transit System website
      viii. Calling dispatch
      ix. Brochures
      x. Advertisement / Newspaper
      xi. Other: _____

2. **Have you ever used** Click here to enter Transit System**?**
   a. Yes
   b. No
   c. If no, why not?
      _____

3. **In which community do you live?**
   a. Click here to enter community name
   b. Click here to enter community name
   c. Click here to enter community name
   d. Click here to enter community name
   e. **Other: _____**

4. **If you have used our service, what improvements would you recommend?**
   a. Later service hours
   b. Earlier service hours
   c. Weekend service
   d. More frequency
   e. Cheaper fare
   f. Other: _____

5. **What mode(s) of transportation do you use? (Circle all that apply)**
   a. Drive myself
   b. Carpool
   c. Walk
   d. Bike
   e. Taxi
   f. Other: _____

6. **For what types of trips do you need transportation?**
   a. Medical
   b. Work
   c. School / Education
   d. Shopping
   e. Social / Recreation
   f. Other: _____

7. **If you had more information about the service, how often do you think you would use it?**
   a. Less than once a month
   b. About once a month
   c. About once a week
   d. 2-3 days a week

8. How would you prefer to learn more about
Click here to enter Transit System?
a. Group presentations
b. Phone calls
c. Television or radio announcements
d. Public meetings
e. Family or friends
f. School
g. Click here to enter Transit System website
h. Calling dispatch
i. Brochures
j. Advertisement / Newspaper
k. Other: _____

The following demographic questions below are optional.

9. What is your gender?
a. Male
b. Female

10. What is your ethnicity? (Circle all that apply)
a. African-American
b. American Indian
c. Asian
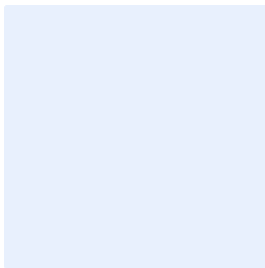d. Caucasian
e. Latino
f. Other: _____

11. What is your employment status?
a. Full-time employed
b. Part-time employed
c. Stay-at-Home Parent or Caregiver
d. Student
e. Retired
f. Unemployed
g. Other: _____

12. What level of education have you completed?
a. High school / GED
b. Some college
c. Associate's Degree / Trade School
d. Bachelor's Degree
e. Master's Degree or higher
f. Other: _____

13. What is your yearly household income?
g. Less than $10,000
h. $10,000 to $29,999
i. $30,000 to $44,999
j. $45,000 to $59,999
k. $60,000 to $74,999
l. $75,000 or higher

14. What is your age?
m. Under 18
n. 18 – 24
o. 25 – 34
p. 35 – 44
q. 45 – 54
r. 55 – 64
s. 65 – 74
t. 75 – 84
u. 85+

Agency Staff Questionnaire

AGENCY NAME: Click here to enter agency name.

SERVICE AREA: Click here to enter service area.

CUSTOMER/CLIENTS SERVED: Click here to enter customer/clients served and to list eligibility requirements.

1. What is your position? (Circle all that apply)
   - ☐ Driver
   - ☐ Dispatcher
   - ☐ Scheduler
   - ☐ Case Worker
   - ☐ Other: _____

2. Please provide a short description of your job duties:

3. What is your agency's "mission"? If unsure, please indicate what you believe it to be.

4. Do you or your agency assist in trip planning for clients?
   - ☐ Yes
   - ☐ No
   - ☐ Sometimes

   If yes or sometimes, who does this? How does the trip planning work?

5. If your agency is unable to take care of a client or community transportation need, where do you direct them?

   When unable to accommodate, do you or another staff person tell the client who to contact? Or do you go ahead and arrange the ride for the client?

6. Is there a county-wide public transit system in the county?
    ☐Yes
    ☐No
    ☐Unsure

    If yes, which describes people's awareness of the county's public transit system?
    ☐Most are aware
    ☐Some are aware
    ☐Few are aware
    ☐None are aware
    ☐Other: _____

7. What is the image of the county's public transit system in the community?

8. List any gaps that you have identified in current transit service provided? Examples: Additional needed routes and/or service hours etc.

9. Do you feel clients or the community have any obstacles keeping them from using the public transit system?
    ☐Yes
    ☐No
    ☐Unsure

    If yes, please share what you have noted.

10. Is there a process in place that allows agency employees to provide administrators with information about the transportation needs of clients?
    ☐Yes
    ☐No
    ☐Unsure

11. What is the policy for following up on client complaints?

12. What challenges do you or your agency face in providing and improving transit services? Examples: funding, time, staff, information, etc.

Service Information Survey

Click here to enter Service Area.

Disclaimer:		Last Updated:	
Public Transit System Contact & Service		**Routes**	**Area, Hours, & Days**
Name:		<u>General Public:</u> ☐ Demand Response ☐ Fixed ☐ Flexible ☐ Other	
Phone#:	Address:		
TTY#:	City, State, Zip:		
Website:		<u>Out of Service Area:</u>	
Email:			
Fares & Alternative Fares:			
		<u>Other Special & Fixed-Flexible:</u>	
Additional Financial Assistance:		Service Types: ☐ Curb-to-Curb ☐ Door-to-Door ☐ Door-Through-Door	☐ Curb-to-Curb (unless Door-to-Door is requested)
Scheduling / Reservations			
Note hours and days are subject to change, please call _____ hours in advance to confirm location and find out about other possible destinations or routes.		Office/Scheduling Hours:	
		Weather & Holiday Closings:	
Additional Information:			
		No-Shows/Cancellations:	

Accessibility & Rider Assistance
Comments, Complaints, or Compliments Procedures
Agency Procedures & Responsibilities:
Passenger Conduct & Responsibilities:

Main Contact, Title:	Direct #:	Email:
Website or Forum:		

Other Agency Information
The agency has a list of policies and/or procedures on the following items: ☐ Non-discrimination ☐ Safety commitment ☐ Emergency procedures ☐ Other (please list):
Townships Served:

Only fill out those fields that pertain to your system