



*"Improving the Quality of Life
by Enhancing Mobility"*

University Transportation Center for Mobility

DOT Grant No. DTRT06-G-0044

Regional Coordination Workshops

Final Report

**John H. Overman, Linda Cherrington, Jeffrey Arndt,
Suzie Edrington, Ryan Taylor, Laura Higgins, Carol
Lewis and Gwen Goodin**

Performing Organization

University Transportation Center for Mobility
Texas Transportation Institute
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16. Abstract There is a demonstrated need for outreach, education, training and technology transfer to public transportation providers, rural transit districts, mobility managers, councils of governments and staff involved in regional human service transit coordination. This project addresses those needs by providing training and technology transfer based on recent research efforts at various institutions to improve regional coordination and transit services. The Regional Coordination Workshop served as the venue to deliver the workshops in themed learning tracks. High priority workshop topics include: partnership development, marketing techniques, public involvement, and information technology applications. The <i>Regional Coordination Workshop</i> was held on July 23 and 24, 2008 at the Omni Austin Hotel at Southpark in Austin, Texas and attended by 172 participants from a variety of agencies and organizations involved in regional human service transit coordination. Regional Coordination Workshop materials and presentations can be found on the <i>Regional Service Planning</i> website (www.regionalserviceplanning.org).					
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Regional Coordination Workshops

by

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Final Report
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DISCLAIMER

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Texas Transportation Institute

Linda Cherrington, Research Scientist (Transit Mobility Program Manager)

Jeffrey Arndt, Research Scientist

Suzie Edrington, Research Specialist

Laura Higgins, Associate Research Scientist

Texas Southern University

Dr. Carol Lewis, Director, Center for Transportation Training and Research

TxDOT Public Transportation Division

Eric Gleason, Director PTN

Kelly Kirkland, Planning and Support Director

Karen Dunlap, Planner

Steve Wright, Coordination Planner

Linda Gonzalez, Planner

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EXECUTIVE SUMMARY

There is a demonstrated need for outreach, education, training and technology transfer to public transportation providers, rural transit districts, mobility managers, councils of governments and staff involved in regional human service transit coordination. This project addressed those needs by providing education and technology transfer based on recent research efforts and shared practices.

The *Regional Coordination Workshop* was held on July 23 and 24, 2008 at the Omni Austin Hotel at Southpark in Austin, Texas. The workshops were co-sponsored by the Texas Department of Transportation's (TxDOT) Public Transportation Division (PTN). Approximately 172 participants from across Texas representing a variety of organizations involved in regional human service transit coordination attended the event. The workshop participants included management and staff from rural and urban transit agencies, council of governments (COG), health and human service (HHS) provider agencies, and TxDOT.

The workshops were delivered in themed learning tracks and combined with plenary sessions. The workshop tracks included:

- Track 1: Building Partnerships
- Track 2: Coordinated Planning
- Track 3: Technology
- Track 4: Marketing/Outreach
- Track 5: Public Involvement

Plenary sessions were used to support the event's theme of *Accountable Partnerships* with presentation from regional coordination partners such as health and human service agency representatives, and councils of government.

Regional Coordination Workshop materials and presentations can be found on the *Regional Service Planning* website (www.regionalserviceplanning.org) along with a *Coordination Clearinghouse* with recent research and coordination resources.¹ The Regional Coordination Workshop program is presented below and a copy of the program is located in Appendix 1.

¹ Go to http://www.regionalserviceplanning.org/coordination/workshops/07_23-24_2008/ for a direct link to Regional Coordination Workshop Materials.

REGIONAL COORDINATION WORKSHOP PLANNING

The Regional Coordination Workshop planning was a cooperative effort involving Texas Transportation Institute (TTI), Texas Department of Transportation (TxDOT) and a steering committee composed of public transportation stakeholders and practitioners. The planning team used conference calls, in-person meetings and email exchanges to prepare the workshop agenda, select workshop topics, and speakers. The workshop planning team members and their affiliations are listed below.

Texas Transportation Institute

John Overman, Associate Research Scientist (Principal Investigator)
Linda Cherrington, Research Scientist (Transit Mobility Program Manager)
Jeffrey Arndt, Research Scientist
Suzie Edrington, Research Specialist
Laura Higgins, Associate Research Scientist

Texas Southern University

Dr. Carol Lewis, Director, Center for Transportation Training and Research

TxDOT Public Transportation Division

Eric Gleason, Director PTN
Kelly Kirkland, Planning and Support Director
Karen Dunlap, Planner
Steve Wright, Coordination Planner
Linda Gonzalez, Planner

Regional Coordination Workshop Steering Committee

Michelle Bloomer, North Central Texas Council of Governments, Arlington, Texas
Stevie Greathouse, Capital Area Metropolitan Planning Organization, Austin, Texas
Sarah Hidalgo-Cook, Community Council of Southwest Texas, Inc., Uvalde, Texas
Rebecca (Becky) Jasso, United Way, Houston, Texas
Rick Moss, Dept. of Assistive & Rehabilitation Services, Odessa, Texas
Maria Roussette, Cameron Works, Brownsville, Texas
Armida Sagaribay, TxDOT - El Paso District
Rob Stephens, Concho Valley Transit District, San Angelo, Texas
Darla Walton, TxDOT - Bryan District

Conference Services

Event planning services were led by Mary Cearley and Kerry Phillip with TTI's Event Management and Planning Department (EMP). The conference service activities involved:

- Registration services that included hosting and maintaining on-line workshop registration web site for registration. Maintaining registration database, prepare name badges, etc.
- Event pre-planning included a budget of anticipated expenses, liaison services with hotel and coordinating audio visual equipment.
- On-Site event management included a conference coordinator to serve as liaison between meeting services providers, a pre-conference meeting with hotel staff to confirm details, organizing food and beverage services, and positioning signage and on-site troubleshooting.
- Post-Event services provided a detailed list of participants registered and attending the conference, and a review of hotel bills to ensure accuracy.

Student Participation

Scholarships were provided to students to attend the workshops. Students also assisted in preparing workshop materials, attending workshops, and photographing speakers. The following students participated in and/or attended the workshops:

Jared Briggs, Graduate Student Research Assistant, Department of Architecture and Urban Planning, Texas A&M University
Suzie Edrington, Graduate Student / TTI Research Specialist, Department of Architecture and Urban Planning, Texas A&M University
Kadijah Hall, Graduate Student, Center for Transportation Training and Research (CTTR), Texas Southern University
Jeff LaMondia, Graduate Research Assistant, Center for Transportation Research (CTR), University of Texas at Austin,
Angeline Lehnert, Graduate Student, Department of Architecture and Urban Planning, Texas A&M University
Grishma Patel, Law Student, Thurgood Marshall School of Law, Texas Southern University

REGIONAL COORDINATION WORKSHOP PROGRAM

A copy of the program distributed at Regional Coordination Workshop is included in Appendix 1. The program is also presented below.

The steering committee's stated purpose for the conference was to provide guidance and share information with lead entities and their transportation partners on ways to enhance community transportation services through coordination. The steering committee's theme for the workshops and discussion is *Accountable Partnerships* emphasizing community transportation and regional coordination.

DAY 1 – JULY 23, 2008

7:30 – 8:30 Registration

8:30 – 8:45 Welcome - Eric Gleason, Director, TxDOT Public Transportation Division

8:45 – 9:15 Keynote Address: *Partner or Die* – Ron Kessler, Ron Kessler Group

9:45 – 10:45 Coordination of Health and Human Services/Community Transportation

TxDOT: Kelly Kirkland, Public Transportation Division

Health and Human Service Agencies: Gerado Cantu, Department of Aging and Disability Services; and, Mark Clardy, Department of Assistive and Rehabilitative Services.

Lead Agencies: Rob Stevens, Concho Valley Council of Governments (COG); Janet Everhard, West Texas Opportunities, Inc.; and, Sarah Hidalgo-Cook, Community Council of Southwest Texas.

10:45 – 11:00 Break

11:00 – 12:00 Workshops (participants should select one track)

Track 1: Building Partnerships with Jim McLary

- Leadership, mission, goals, objectives and establishing roles and responsibilities;
- Tools and techniques for building partnerships; consensus building

Track 2: Coordinated Planning with Margi Ness

- Framework for Action / Running a Framework for Action workshop
- Managing regional steering committee meetings

Track 3: Technology with Carol Lewis, Laura Higgins, Suzie Edrington, Jeff Arndt, and Linda Cherrington

- Technology application in human service coordination
- Selecting and implementing technology applications

Track 4: Marketing with Kristen Joyner and Rick L'Amie.

- Public transportation marketing 101
- Preparing marketing plans / marketing campaigns

Track 5: Public Involvement with John Overman, Tina Geiselbrecht and Meredith Highsmith

- Designing a public involvement plan and selecting involvement techniques
- Identifying and reaching out to stakeholders

12:00 – 1:30 Lunch

1:30 – 3:30 Workshops (continued)

Track 1: Building Partnerships

Track 2: Coordinated Planning

Track 3: Technology.

Track 4: Marketing

Track 5: Public Involvement

3:30 – 3:45 Break

3:45 – 4:45 The New Paradigm plenary session with Jim McLary

4:45 – 5:00 Closing Remarks for Day 1 with Eric Gleason

5:30 – 7:00 Regions Round-up - Mixer and Poster Session

The event will be similar in style to a TRB poster session. The event is intended to foster inter-regional coordination and networking. All planning regions and/or providers will be invited to prepare a poster and present information about their region, or practices within their region.

DAY 2 – JULY 24, 2008

7:30 – 8:00 Registration and Continental Breakfast

8:00 – 9:30 Workshops (continued)

Track 1: Building Partnerships

Track 2: Coordinated Planning

Track 3: Technology

Track 4: Marketing

Track 5: Public Involvement

9:30 – 9:45 Break

9:45 – 11:45 Workshops (continued)

Track 1: Building Partnerships

Track 2: Coordinated Planning

Track 3: Technology.

Track 4: Marketing

Track 5: Public Involvement

11:45 – 1:15 Box Lunch Round-up

Lunch time table-top discussions on issues and experiences on various topics led by a facilitator. Topics may include: driver recruitment and retention, involving elected officials, mentoring programs, ride share programs, maintenance coordination, research updates, workforce coordination, HHS Coordination, intercity bus service, pooled insurance, coordination guidebook, service planning and land use working together.

Discussion leaders/topics:

Coordination Guidebook - Laura Higgins

Coordination Guidebook - Dr. Carol Lewis

Involving elected officials - Tina Geiselbrecht

Regional maintenance coordination- Paul Moon

Driver recruitment and retention (TBA)

Creative New Freedom and JARC projects

Research updates - Chandra Bhat

Mentoring programs – (TBA)

Statewide Resource Guide – Jacque Wolske

Website Update - John Overman

Intercity bus – (TBA)

Barriers and constraints - Jeff Arndt

1:15 – 2:00 Open Sessions – Concurrent Panel Discussions

Overcoming Jurisdictional Issues

Stevie Greathouse, Capital Area Metropolitan Planning Organization
Sean Moran, Capital Area Council of Governments
Chris Ramser, Capital Area Council of Governments

Coordinating Americans with Disabilities (ADA) Paratransit Service

James Powell, North Central Texas Council of Governments

Making Mobility Management Work

Brigida Gonzalez, Corpus Christi Metropolitan Planning Organization
Bob Dickinson, South East Texas Regional Planning Commission
Kara Stevens, South East Texas Regional Planning Commission

Regional IT Communication Coordination

Tom Smith, West Central Texas Council of Governments
J. R. Salazar, Central Texas Rural Transit District
Dave Marsh, Capital Area Rural Transportation System

Working with Work Force

Norma Zamora, Brownsville Urban System
Julie Talbert, Heart of Texas Workforce
Jane Hibdon, Alamo Area Development Council

2:00 – 2:10 Break

2:10 – 3:00 Continuation of Open Sessions – Concurrent Panel Discussions

Overcoming Jurisdictional Issues

Coordinating Americans with Disabilities (ADA) Paratransit Service

Making Mobility Management Work

Regional IT Communication Coordination

Working with Work Force

2:00 – 2:10 Break

3:25-4:30 Plenary Session

Measuring Success

Eric Gleason, TxDOT Public Transportation Division
Tom Niskala, Corpus Christi Metropolitan Planning Organization
Sarah Hidalgo-Cook, Community Council of Southwest Texas

Program Updates

Eric Gleason, TxDOT Public Transportation Division

4:30 Adjourn

APPENDIX 1 – WORKSHOP PROGRAM



Building Partnerships: *MOVING FORWARD*

2008 Workshops and Discussions on Regional Coordination



July 23-24, 2008
Omni Austin Hotel at Southpark

COMMUNITY TRANSPORTATION REGIONAL COORDINATION

The purpose of this workshop is to provide guidance and share information with lead agencies and their partners on ways to enhance community transportation services through coordination.

The theme for the workshops and discussion is "Accountable Partnerships," emphasizing community transportation and regional coordination.

DAY 1 – JULY 23, 2008

7:30 a.m. – 8:00 a.m.	REGISTRATION AND CONTINENTAL BREAKFAST	
8:30 a.m. – 8:45 a.m.	WELCOME Eric Gleason, Director, TxDOT Public Transportation Division	Omni D
8:45 a.m. – 9:15 a.m.	KEYNOTE ADDRESS <i>Partner or Die</i> Ron Kessler, Ron Kessler Group	Omni D
9:15 a.m. – 10:45 a.m.	<i>Coordination of Health and Human Services/ Community Transportation</i> TxDOT: Kelly Kirkland, Public Transportation Division Health and Human Service Agencies: TBA, Department of State Health Services Gerardo Cantu, Department of Aging and Disability Services Mark Clardy, Department of Assistive and Rehabilitative Services Lead Agencies: Rob Stephens, Concho Valley COG Janet Everheart, West Texas Opportunities, Inc. Sarah Hidalgo-Cook, Community Council of Southwest Texas	Omni D
10:45 a.m. – 11:00 a.m.	BREAK	

DAY 1 – JULY 23, 2008

11:00 a.m. – 12:00 p.m. **WORKSHOPS** (*participants should select one track for the duration of the workshop*)

TRACK 1: BUILDING PARTNERSHIPS Omni A
Margi Ness, Community Transportation Association of America

TRACK 2: COORDINATED PLANNING Omni D
Jim McLary, Community Transportation Association of America

TRACK 3: TECHNOLOGY Omni B
Linda Cherrington, Texas Transportation Institute
Laura Higgins, Texas Transportation Institute
Suzie Edrington, Texas Transportation Institute

TRACK 4: MARKETING/OUTREACH Omni E
Kristen Joyner, South West Transit Association
Rick L'Amie, Capital Metropolitan Transportation Authority

TRACK 5: PUBLIC INVOLVEMENT Omni F
John Overman, Texas Transportation Institute
Tina Geiselbrecht, Texas Transportation Institute

12:00 p.m. – 1:30 p.m. **LUNCH** (on your own)

DAY 1 – JULY 23, 2008

1:30 p.m. – 3:30 p.m. **WORKSHOPS** (continued)

TRACK 1: BUILDING PARTNERSHIPS Omni A

Margi Ness, Community Transportation Association of America

TRACK 2: COORDINATED PLANNING Omni D

Jim McLary, Community Transportation Association of America

TRACK 3: TECHNOLOGY Omni B

Linda Cherrington, Texas Transportation Institute

Laura Higgins, Texas Transportation Institute

Suzie Edrington, Texas Transportation Institute

TRACK 4: MARKETING/OUTREACH Omni E

Kristen Joyner, South West Transit Association

Rick L'Amie, Capital Metropolitan Transportation Authority

TRACK 5: PUBLIC INVOLVEMENT Omni F

John Overman, Texas Transportation Institute

Tina Geiselbrecht, Texas Transportation Institute

3:30 p.m. – 3:45 p.m. **BREAK**

3:45 p.m. – 4:45 p.m. **PLENARY SESSION** Omni D

The New Paradigm

Jim McLary, Community Transportation Association of America

4:45 p.m. – 5:00 p.m. **CLOSING REMARKS FOR DAY 1** Omni D

Eric Gleason, TxDOT Public Transportation Division

5:30 p.m. – 7:00 p.m. **POSTER SESSION AND MIXER** The Oaks

Poster presentations will highlight successful and innovative projects involving regional transportation coordination.

DAY 2 – JULY 24, 2008

7:30 a.m. – 8:00 a.m. **REGISTRATION AND CONTINENTAL BREAKFAST**

8:00 a.m. – 9:30 a.m. **WORKSHOPS (continued)**

TRACK 1: BUILDING PARTNERSHIPS Omni A
Margi Ness, Community Transportation Association of America

TRACK 2: COORDINATED PLANNING Omni D
Jim McLary, Community Transportation Association of America

TRACK 3: TECHNOLOGY Omni B
Linda Cherrington, Laura Higgins, Suzie Edrington

TRACK 4: MARKETING/OUTREACH Omni E
Kristen Joyner, Rick L'Amie

TRACK 5: PUBLIC INVOLVEMENT Omni F
John Overman, Tina Geiselbrecht

9:30 a.m. – 9:45 a.m. **BREAK**

9:45 a.m. – 11:45 a.m. **WORKSHOPS (continued)**

TRACK 1: BUILDING PARTNERSHIPS Omni A
Margi Ness, Community Transportation Association of America

TRACK 2: COORDINATED PLANNING Omni D
Jim McLary, Community Transportation Association of America

TRACK 3: TECHNOLOGY Omni B
Linda Cherrington, Laura Higgins, Suzie Edrington

TRACK 4: MARKETING/OUTREACH Omni E
Kristen Joyner, Rick L'Amie

TRACK 5: PUBLIC INVOLVEMENT Omni F
John Overman, Tina Geiselbrecht

DAY 2 – JULY 24, 2008

11:45 a.m. – 1:00 p.m. **BOX LUNCH ROUNDUP** Omni C
*Lunch-time round table discussions on
issues and experiences on various topics led by a facilitator.*

TOPICS

1. *Coordination Guidebook*
2. *Coordination Guidebook*
3. *How to Involve Elected Officials*
4. *Regional Maintenance Coordination*
5. *Driver Recruitment and Retention*
6. *Creative New Freedom and JARC projects*
7. *Research Updates*
8. *Mentoring Programs*
9. *Ride Share Programs*
10. *Statewide Resource Guide*
11. *Website Update*
12. *Intercity Bus*
13. *Barriers And Constraints*

1:00 p.m. – 1:10 p.m. **BREAK**

DAY 2 – JULY 24, 2008

1:10 p.m. – 2:00 p.m. **OPEN SESSIONS**
Concurrent Panel Discussions

Overcoming Jurisdictional Issues Omni A

Stevie Greathouse, Capital Area Metropolitan Planning Organization
Sean Moran, Capital Area Council of Governments
Chris Ramser, Capital Area Council of Governments

Coordinating Americans with Disabilities (ADA) Paratransit Services Omni B

James Powell, North Central Texas Council of Governments

Making Mobility Management Work Omni D

Brigida Gonzalez, Corpus Christi Metropolitan Planning Organization
Bob Dickinson, South East Texas Regional Planning Commission
Kara Stevens, South East Texas Regional Planning Commission

Regional IT Communication Coordination Omni E

Tom Smith, West Central Texas Council of Governments
J. R. Salazar, Central Texas Rural Transit District
Dave Marsh, Capital Area Rural Transportation System

Working with Work Force Omni F

Norma Zamora, Brownsville Urban System
Julie Talbert, Heart of Texas Workforce
Jane Hibdon, Alamo Area Development Council

2:00 p.m. – 2:10 p.m. **BREAK**

ACKNOWLEDGMENTS

WORKSHOP PLANNING COMMITTEE

Michelle Bloomer, North Central Texas Council of Governments
Stevie Greathouse, Capital Area Metropolitan Planning Organization
Sarah Hidalgo-Cook, Community Council of Southwest Texas, Inc.
Becky Jasso, United Way of Greater Houston–Bay Area
Rick Moss, Department of Assistive and Rehabilitative Services
Maria Roussette, Cameron Works
Armida Sagaribay, TxDOT El Paso District
Rob Stephens, Concho Valley Transit District
Darla Walton, TxDOT Bryan District

TXDOT PUBLIC TRANSPORTATION DIVISION

Kris Dudley
Karen Dunlap
Eric Gleason
Linda Gonzalez
Kelly Kirkland
Steve Wright

TEXAS TRANSPORTATION INSTITUTE

Mary Cearley
Kerry Phillip
John Overman

APPENDIX 2 – WORKSHOP PHOTOGRAPHS



Figure 1. Registration Desk



Figure 2. Plenary Session



Figure 3. Poster Session



Figure 4. Poster Session Discussion



Figure 5. Participants in Workshop Activity – Re-Framing Questions.



Figure 6. Workshop Activity Introduction

APPENDIX 3 – WORKSHOP LESSON PLANS

Technology Workshop

<p style="text-align: center;">OVERVIEW & PURPOSE</p> <p>This workshop presents steps in the path of technology decisions for transit providers. Emphasis will be given on the use of technology in transit coordination efforts. The purpose of the workshop is to improve effectiveness of transportation service, generate efficiencies in operation, enhance customer service and satisfaction and encourage cooperation and coordination through use of technology.</p>	<p>Instructors: Cherrington Higgins Edrington Lewis</p>
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Time Allocation	<p>6.5 classroom hours Day 1= 3 hrs (11:00-3:30) Day 2 =3.5 hrs (8AM- Noon)</p>
LEARNING OBJECTIVES	<p>Participants will be able to:</p> <ul style="list-style-type: none"> • Identify major transit technology tools by function • Explain the roles of technology in transit planning • Identify the three-step process in transit system’s need for technology <ul style="list-style-type: none"> ○ Assess the existing transit system to identify strengths and weaknesses ○ Predict future needs to meet short-term and long-term goals ○ Analyze current business processes • Understand cost factors in acquiring, implementing and maintaining technology applications and possible financial resources • Assess the implications of new technology on the operation • Describe technology options with different organizational structures • Explain considerations regarding installation and implementation of technology
INSTRUCTIONAL METHOD	<p>The instructor will use a combination of lecture and participant activities to achieve learning objectives. Each lesson will include a participant activity. These activities may include group or individual exercises.</p>
VERIFICATION	<p>Verification will be accomplished by reviewing learning objectives at the end of each lesson, conducting learning activities and discussion with participants.</p>
ACTIVITIES	<p><u>Activity 1</u> Worksheet 1 - Goals and objectives <u>Activity 2</u> Worksheet 2 Potential technology tools <u>Activity 3</u> Worksheet 3 What are we good at? What needs work? <u>Activity 4</u> Worksheet 4 Look into the future</p>
COMMENTS	

<p style="text-align: center;">RESOURCE MATERIAL(S) & REFERENCES</p>	<p>The content source materials are:</p> <ul style="list-style-type: none"> • TxDOT Project 0-5542, Integrating Regional Multimodal and Public Transportation Planning – Task 7 – <i>Improving Rural Transit Service Delivery and Operations Using Practical Technology Applications</i>, February 7, 2008 • Texas Transportation Institute, <i>White Paper – Technology and Public Transportation Operation and Management</i>, October 2006 • Transportation Research Board, <i>TCRP Report 124 – Guidebook for Measuring, Assessing, and Improving Performance of Demand-Response Transportation</i>, 2008 • The Harvard Design and Mapping Company, Inc., A guidebook (and Best Practices) for Planning APTS/ITS Applications for Rural Transit Systems, prepared for FTA Office of Research, Demonstration, and Innovation, June 2001 • University of California at Berkeley, “ITS Decision: A Guide to Understanding and Applying Intelligent Transportation Systems,” http://www.calccit.org/itsdecision/ • Kessler, D., TCRP Synthesis 57: Computer-Aided Scheduling and Dispatch in Demand-Responsive Transit Services, Transportation Research Board, 2004 • Pennsylvania Transportation Resource and Information Network, <i>Guide for Acquiring Demand Responsive Transit Software and Technology</i>
<p style="text-align: center;">MATERIALS NEEDED</p>	<p>Projector for PowerPoint presentation Four flip charts, easel and pens</p>

Day 1	Lesson 1: Introduction and Overview Carol Lewis	60 min
11:00-12:00	<u>Topics</u> <ul style="list-style-type: none"> • Introductions • Workshop Expectations • Review Workshop Learning Objectives • Review Workshop Agenda and Topics • Activity - Goals and Objectives of Technology Use 	40 min
	<u>Activity 1 – Worksheet 1 (Goals and objectives)</u> <i>What are some of the goals and objectives for your agency and region? What technology applications can you think of that might help to meet these goals and objectives?</i> Small group exercise. Participants report back to class, prepare a worksheet and save for later in Workshop. The instructor should re-visit these goals and objectives to see if the tools and resources provided assist meeting the goals and objectives.	20 min
Lunch break (1.5 hours)		

Day 1	Lesson 2 – Technology Applications Jeff Arndt	45 min
1:30- 2:15	<u>Learning Objectives:</u> <ul style="list-style-type: none"> • Describe major transit technology tools by function 	
	<u>Topics</u> <ul style="list-style-type: none"> • Existing resources on transit technologies <ul style="list-style-type: none"> ○ TCRP Synthesis 57, TCRP Report 76, PennTRAIN’s guidebook ○ ITS Decision website at UC Berkeley ○ TxDOT Regional ITS architectures • Transit technology grouped by function 	35 min
	<u>Activity 2:</u> Complete Worksheet 2: potential technology tools to help achieve goals listed in Activity 1. Participants will complete this in small groups for their regions and report back to class. Use handouts or PPT slides	20 min

Day 1	Lesson 3 – Identify Transit System Needs for Technology Suzie Edrington with Lisa Cortinas	75 min
2:15 – 3:30	<u>Learning Objectives</u> <ul style="list-style-type: none"> • Be able to describe strengths and weaknesses of the existing transit system • Be able to explain the implications of new technology on the existing operation • Analyze current business processes • Assess the implications of new technology on specific business processes 	
	<u>Topics</u> <ul style="list-style-type: none"> • How to recognize and document strengths and weaknesses related to goals and objectives • How can technology be used to leverage strengths and address weaknesses in operations, customer service, or other identified functions? • Identify time consuming and/or costly tasks as related to business 	50 min

	<ul style="list-style-type: none"> processes Determine if technology applications could help improve business processes 	
	<u>Activity 3:</u> Worksheet 3: What are we good at? What needs work? List strengths and weakness as related to goals and objectives: in operations, in business practices, in customer service, in communications, in maintenance, etc.	25 min
3:30-3:45	Break	

Day 2	Lesson 4 – Future Needs, Cost Factors and Availability of Financial Resources Carol Lewis and Laura Higgins	90 min
8:00-8:15	Review Day 1 - Carol Lewis	15 min
	Learning Objectives: <ul style="list-style-type: none"> Predict future needs to meet short-term and long-term goals Assess the implications of new technology on the future operation Describe technology options with different organizational structures Understand cost factors in acquiring, implementing and maintaining technology applications and possible financial resources 	
8:15 – 9:00	<u>Topics</u> <ul style="list-style-type: none"> Considerations in forecasting future needs <ul style="list-style-type: none"> service coordination/additional partners additional vehicles additional dispatch or other computer stations Determine if technology applications can help to accomplish plans for the future Cost factors associated with acquiring, implementing and maintaining technology applications (costs per license, per workstation, per vehicle, etc.) FTA and other federal funding sources Funding eligibility and limitations Sharing costs across organizations Private sector funding sources <u>Activity 4.</u> Complete Worksheet 4 - Look into the future	55 min
9:00	Lesson 5 Case Studies, Demonstration and Overcoming Barriers to Installation and Implementation of Technology <ul style="list-style-type: none"> Dave Marsh CARTS - Lone Star Card Project Implementing Technology 	
Break 9:30-9:45		

Day 2	Lesson 5 Continued Demonstration and Overcoming Barriers to Installation and Implementation of Technology Carol Lewis	120 min
9:45-11:30	<u>Learning Objectives</u> <ul style="list-style-type: none"> • Understand considerations regarding installation and implementation of technology 	
	<u>Topics</u> <ul style="list-style-type: none"> • Activity – Technology Case Study & Demonstration by technology Vendor(s) • List barriers to installation and implementation <ul style="list-style-type: none"> ○ Identify both technical and human factor barriers • Identify possible solutions to installation and implementation barriers • Dave (MJM, Trapeze, Mentor) • Routematch <p>MJM 20 Minutes Routematch 20 Minute Mentor 20 Minutes Trapeze (maybe)</p>	105
11:30 – 11:45	Course Review Carol Lewis Learning Objectives	15

Public Involvement Workshop

OVERVIEW & PURPOSE		Instructors: Overman Geiselbrecht Highsmith
This workshop is based on the National Transit Institute course on Public Involvement in Transportation Decision-making with an additional emphasis on regional coordination in Texas. The workshop will highlight key public involvement requirements, planning, and techniques. The purpose is to provide participants with the knowledge and skills they can use in their regions to improve public involvement and coordination efforts.		
Time Allocation	6.5 classroom hours Day 1= 3 hrs (11:00-3:30) Day 2 =3.5 hrs (8AM- Noon)	
LEARNING OBJECTIVES	Participants will be able to: <ul style="list-style-type: none"> • Identify key transportation decision points where the public can/should be involved and integrate the public involvement process with the decision-making process. • List the key legal requirements for public involvement and the principles from agency guidance on public involvement • Identify public involvement opportunities in your region’s plan and process, and implementation • Describe different public involvement techniques and how they can be used • Differentiate between an interest and a position • Identify the interests that underlie stated positions • Tailor public involvement to meet your region’s needs • Connect behavior with underlying attitudes/values • Identify different publics and engage them through targeted techniques 	
INSTRUCTIONAL METHOD	The instructor will use a combination of lecture and participant activities to achieve learning objectives. Each lesson will include a participant activity of some kind. These activities may include group or individual exercises or role-play activities.	
VERIFICATION	Verification will be accomplished by reviewing learning objectives at the end of each lesson, conducting learning activities, and discussion with participants.	
ACTIVITIES	<p><u>Activity 1:</u> <i>What are the greatest challenges in planning and implementing public involvement in your region? Save for end of Day 2 and review. Worksheet 1.</i></p> <p><u>Activity 2:</u> Groups prepare public involvement expectations for their regions, list on flip charts/worksheets and report back to class. Save for review at end of workshop on Day 2</p> <p><u>Activity 3:</u> Groups identify elements of plan where public involvement should occur. Individuals share successful techniques in their region. Small groups prepare cost estimate for public involvement. Complete worksheet.</p> <p><u>Activity 4:</u> Case Study: Cap Metro’s Meredith Highsmith will present poster session and lead discussion on barriers, non-traditional participants.</p> <p><u>Activity 5:</u> Participants will read sample exchange and make observations. A role play exchange will be conducted among willing participants. Instructors will play role of concerned citizen with issue.</p>	

RESOURCE MATERIAL(S) & REFERENCES	<i>The primary content source material is the NHI / NTI Course: PUBLIC INVOLVEMENT in the TRANSPORTATION DECISIONMAKING PROCESS.</i>
MATERIALS NEEDED	At least four flip charts for class activities. Projector.

Public Involvement Workshop

Day 1	Lesson 1: Introduction and Overview	60 min
11:00-12:00	<u>Topics</u> <ul style="list-style-type: none"> • Introductions • Workshop Expectations • Review Workshop Learning Objectives • Review Workshop Agenda and Topics • Public Involvement Issues Activity 	40 min
	<u>Activity 1:</u> <i>What are the greatest challenges in the planning and implementing public involvement in your region?</i> Small group exercise to complete a PI worksheet. Participants report back to class, list on flip chart and save for later in Workshop. The instructor should re-visit these issues in Overcoming Barriers and Course Summary to see if the tools and resources provided assist in addressing the issue.	20 min
Lunch break (1.5 hours)		

Day 1	Lesson 2 – Public Involvement: A Key to Decision-making	45 min
1:30- 2:15	<u>Learning Objectives:</u> <ul style="list-style-type: none"> • Identify key transportation decision points where the public can/should be involved and integrate the public involvement process with the decision-making process. • List the key legal requirements for public involvement and the principles from agency guidance on public involvement • Explain why we do public involvement 	
	<u>Topics</u> <ul style="list-style-type: none"> • Public involvement connection to decision-making • Legal framework for public involvement <ul style="list-style-type: none"> ○ SAFETEA-LU ○ NEPA, Title VI, Executive Order 12898 • ONE process – Rural, Metro, and Statewide transportation planning <ul style="list-style-type: none"> ○ 25 MPOs in Texas / Rural Consultation • Introduce the “Briefing Book” • Public expectations • Expectations for you and your region (Activity) • Review 	25 min
	<u>Activity 2</u> Groups prepare public involvement expectations for their regions, list on flip charts / worksheets and report back to class. Also save list for review at end of workshop on Day 2. Complete worksheet.	20 min

Day 1	Lesson 3 - Designing a Public Involvement Plan and Selecting Techniques	75 min
2:15 – 3:30	<u>Learning Objectives</u> <ul style="list-style-type: none"> • Identify public involvement opportunities in your region’s plan and process, and implementation • Describe different public involvement techniques and how they can be used • Describe the different “Publics” in Public Involvement 	
	<u>Topics</u> <ul style="list-style-type: none"> • Linking public involvement to your regional plan and planning process • Key considerations • Identifying the different publics in public involvement (more later in Lesson 5) • Distribute and review Public Involvement Plan Template • Matching strategy to decision • Setting goals and objectives • Identify the "Techniques" book and On-line Resources • Distribute and review Regional Plan Outline (Activity 10 Minutes) <ul style="list-style-type: none"> ○ Mark outline for PI opportunities ○ List type of PI to use • Outcomes and Outputs • How much it does it cost? How do you fund PI? • Evaluating success <ul style="list-style-type: none"> ○ Output v. Outcome ○ Recruit champions ○ New interest groups ○ What do you do with the PI response you get? • Review Learning Objectives 	40 min
	<u>Activity 3</u> Small groups will identify elements of plan outline where PI should occur. Individuals will share successful used techniques in their Regions. Small groups will prepare cost estimate for their draft plan on worksheets and share with class.	35 min

Day 2	Lesson 4 – Problem Solving and Values	45 min
8:00-8:15	Review Day 1	10 min
8:15 – 8:45	<u>Learning Objectives:</u> <ul style="list-style-type: none"> • Differentiate between an interest and a position • Identify the interests that underlie stated positions • Tailor public involvement to meet needs • Connect behavior with underlying attitudes/values 	
	<u>Topics</u> <ul style="list-style-type: none"> • Interest Based Problem Solving • Goal-based negotiation • Organizational and Individual Values • Building credibility 	40 min
	<u>Activity:</u> instructor should use Q&A and class discussion to test learning objectives. Provide examples.	

Day 2	Lesson 5: Identifying and Reaching out to Key Stakeholders	45 min
8:15-9:00	Learning Objectives: <ul style="list-style-type: none"> Identify different publics and engage them through targeted techniques 	
	Topics <ul style="list-style-type: none"> Engaging the Public in Creating the Plan Identifying Stakeholders Interviews Inclusion Levels of Participation Barriers to Participation Meeting Needs of Non-Traditional Participants Non-Standard Techniques Developing Cultural Competence 	20 min
	<u>Activity 4</u> Case Study: Cap Metro’s Meredith Highsmith will present session and lead discussion on barriers, non-traditional participants.	25 min

Day 2	Lesson 6: Effective Communication	30 min
9:00 – 9:30	<u>Learning Objectives</u> <ul style="list-style-type: none"> Provide information to the public in a way that is engaging and accessible 	
	Topics <ul style="list-style-type: none"> Reframing comments Using technology 	
	<u>Activity 5</u> Participants will read sample exchange and make observations. A role play exchange will be conducted among willing participants. Instructors will play role of concerned citizen with issue. Participants will practice re-framing with a partner.	15 min
Break 9:30-9:45		

Day 2	Lesson 7: Facilitating Public Groups	30 min
9:45-10:15	<u>Learning Objectives</u> <ul style="list-style-type: none"> Facilitate and conduct advisory groups or public involvement meetings 	
	Topics <ul style="list-style-type: none"> Purpose of the stakeholder group Membership: Who is invited and who they represent Operating Principles: Ground rules Communication: How the group speaks to the press, to the larger community Decision-making: How the group makes its own decisions Link to Transportation Decisions: How the steering committee’s work will be used 	15
	<u>Activity</u> Participants will be given 3-4 scenarios and asked how to address the situation. Example Scenarios: Only three people show to meeting. What do you do if too many show up. What do you do with very dominant individuals? How do you engage the quiet and or shy? (instructor should use challenges identified in Lesson 1. Use actual cases when possible.	15

Day 2	Lesson 8: Overcoming Barriers & Closing the Loop	60 min
10:15-11:15	<u>Learning Objectives</u> <ul style="list-style-type: none"> • List techniques and strategies to overcome barriers and challenges in your region • List public involvement expectations for your region • Link public involvement with decision-making 	
	<u>Topics</u> <ul style="list-style-type: none"> • Problem solving – Overcoming Barriers and Issues • Commitment to Change • How do recruit players and “champions • Outreach to get Stake holders • Joining forces and piggy-backing opportunities (other agencies, partners, champions) • The role of the Media • Find common goals • Turf issues 	30
11:15 – 11:45	Review Course Learning Objectives	30

APPENDIX 4 – WORKSHOP PARTICIPANT REGISTRATION

Last Name	First Name	Position	Organization
Abebe	Lydia	Transportation Planner	HGAC
Allen	Jamie	Local Government Services Coordinator	Panhandle Reg Planning Comm
Arndt	Jeff	Research Scientist	TTI
Ator	Robert	Director of Urban Operations	Hill Country Transit District
Bañales	Xavier	Executive Director	LULAC Project Amistad
Barrera Soza	Eloy	Community Advocate Member	RTA Comm for Accessible Trans.
Barrow	Chamane	Associate Director	Brazoria Co Ctr for Indep Living
Bernal	Eddie	Transportation Analyst	Laredo Transit Mgmt
Bhat	Chandra	Professor	UT Austin
Birmingham	Jean	RTAC Member	East Texas COG
Blackman	John	Director Transportation Services	American Red Cross
Bloomer	Michelle	Program Manager	NCTCOG
Bonhomme	Dom	Business Development Manager	MJM Innovations
Briggs	Jared	Student Research Assistant	Texas A&M University
Brooks	Reta	Executive Director	Public Transit Services
Bullock	Richard	Director of Planning and Development	Coastal Bend COG
Canon	Andrew	Director	Hidalgo County MPO
Cantu	Jennifer	Community Development Director	Texoma COG
Cantu	Gerardo	Policy Analyst	DADS
Cardenas	Roger	Director	South Plains Community Action
Carroll	Brandy	Transportation Analyst	KFH Group, Inc.
Carter-Dyer	Wanda	Public Transportation Coordinator	TXDOT
Castle	Lynn	PTC	TxDOT
CCSWT	Placeholder		Community Council of SW TX Inc.
Chambers	Vernon	Project Director	Harris County RIDES
Cherrington	Linda	Research Scientist	TTI
Clardy	Mark		DARS - Dept. of Assistive & Rehab Services
Clower	Charlotte	Director of Transportation	Community Transit Services
Collins	Nina	Director of Operations	Midland-Odessa UTD
Cortez	John Michael		Caipital Metro
Cortinas	Lisa	Director of Transportation Services	Golden Crescent Reg Plng Comm
Cosner	Peggy	Executive Director	Heart of Central TX Indep Living
Cowley	Claudia	Executive Director	Captrans
Davis	Greg	PTC Waco District	TxDOT
Day	Michael	VR Counselor	Division For Rehabilitation Services
Del Bosque	Margie	Director	Kleberg Co Human Services
Denney	Marion	Project Manager III	Dallas Area Rapid Transit

Last Name	First Name	Position	Organization
Dickinson	Bob	Director of Transportation & Environmental Resources	SE TX Reg Planning Comm
Dudley	Kris	Program Manager	TxDOT
Dunlap	Karen	Planner	TxDOT
Edrington	Suzie	Research Specialist	TTI
Edwards	Connie	Transportation Coordinator	SE TX Reg Planning Comm
Ericksen	Scott		SA BC MPO
Everheart	Janet	Executive Director	West Texas Opportunities, Inc.
Faulkner	Karen	Transportation Director	West Texas Opportunities, Inc.
Fickes	Ken	Transit Services Director	Harris County Community Svcs
Flowers	Tony	Transit Coordinator	City of Grand Prairie
Floyd	Julie	Transit Manager	Cletrans - City/County Transportation
Frost	David		VIA
Gandy	Margie	Public Transportation Coordinator	TxDOT
Garcia	Les	Operations Manager	Victoria Transit/RTRANSIT
Garcia	David	Transportation Coordinator	
Garcia	Joe	Accountant	Workforce Solutions
Gardzina	Joe	Mobility Manager	Fort Bend County Public Trans
Gephart	Sharon	Director	Bosque County Public Transit
Geyer	Bob	Transit Manager	El Paso County
Gilliland	Jennifer		
Giordanengo	Bill	General Manager	Texoma Area Paratransit Sys
Gleason	Eric	Director	TxDOT
Gonzales	Alfredo	Public Transportation Coordination	TxDOT
Gonzalez	Brigida	Regional Transportation Coordinator	CCMPO
Gonzalez	Linda	Planner	TxDOT
Goodall	Carolyn	Public Transportation Administrator	TxDOT
Gray	Nic	Transportation Director	Special Programs for Aging Needs
Greathouse	Stevie	Principal Planner	Capital Area Metro Planning Org
Guzman	Belinda		Community Council of SW TX Inc.
Hackett	Kari	Program Manager	HGAC
Hall	Kadijah		Texas Southern University
Hamilton	Deanne	Engineering Specialst	TxDOT
Hanlon	Gary W.	Planner	Deep East Texas COG
Harris	Jo	Assistant Transit Manager	City of Port Arthur
Harvey	Melinda	Director of Planning	Citibus
Hawkins	Omega	General Manager	Kaufman Area Rural Transportation
Hidalgo-Cook	Sarah	Transit & Safety Director	Community Council of SW TX Inc.
Highsmith	Meredith	Planner	Capital Metro
Hilgemeier	Matthew	Methods and Procedures Specialist	Brazos Valley COG
Hinojosa-Garza	Ivonne	Contract Specialist	TxDOT

Last Name	First Name	Position	Organization
Hobson	Mary	Fort Worth District PTC	TxDOT
Holland	Joe	Public Transportation Coordinator	TxDOT
Hosen	Ken	Vice President	KFH Group, Inc.
Hubbard	Griff	Chairman	East Texas Regional Transportation Coordination Steering Committee
Huddleston	Jessie	Transportation Planner	NCTCOG
Hudson	Sonya	Public Transportation Coordinator	TxDOT
Huerta	Vicente	Director of Transportation	LULAC Project Amistad
Jacobs	Matt	Chief Information Officer	Citibus
Jasso	Becky	Area Director	United Way
Joyner	Kristen	Executive Director	South West Transit Association
Kelley	Rita	Director-Indigent Health Svcs	Bell County Texas
Killebrew	Bobby	Deputy Director	TxDOT
Kirkland	Kelly	Director, Planning & Support - PTN	TxDOT
Koehler	Linda	Director of Business Services & Planning	Workforce Solutions
L'Amie	Rick	Vice President of Marketing	Capital Metro
LaMondia	Jeff	Graduate Research Assistant	UT Austin
Lapaglia	Lucy	Public Transportation Manager	TxDOT
Lara	Jose	Public Transportation Coordinator	TxDOT
Lauck	Joyce	Executive Director	Austin Groups for the Elderly
Lehnert	Angie	Research Assistant	TTI
Lewis	Carol	Director and Associate Professor	Texas Southern University
Lowery	Edie	Director/Grant Programs	Houston METRO
Lutz	Beverly	Transportation Manager	AACOG
Madrid	Pete	Transportation Planner I	Concho Valley Transit District
Marsh	Dave	Executive Director	CARTS
Martin	June	Lecturer	Texas A&M University
Maxwell	Richard		The T
Mayo	Carole	Public Transportation Coordinator	TxDOT
Mazur	Cheryl	Director of Program Management	TxDOT
McCune	Elton	Executive Director	Cherokee Mental Retardation Assoc.
McKinley	Roxanne	Director of Transportation	East Texas COG
McLary	James	Principal	McLary Management
Merritt	David	Public Transportation Coordinator	TxDOT
Michaels	Elizabeth	City of San Antonio	City of San Antonio
Moharer	Jamal	Smith County Representative	East TX Coord Trans Steering Comm
Moon	Paul	Planner	TxDOT

Last Name	First Name	Position	Organization
Mrok-Smith	Anne	Sr. Public Information Planner	HGAC
Mundy	Joanne	Social Work Services Coordinator	Department of State Health Services
Munson	Bill	General Manager	Beaumont Municipal Transit System
Nelson	Lyle	Vice President	Brazos Transit District
Ness	Margi	United We Ride Ambassador	CTAA
Niskala	Tom	Transportation Planning Director	CCMPO
Ornelas	Martin	Kingsville Health Center Director	Community Action Corp of South TX
Overman	John	Associate Research Scientist	TTI
Owen	Paula	Transportation Director	Central Texas Senior Ministry
Parks	Michael	Assistant Executive Director	Brazos Valley COG
Patel	Grishma	Student Researcher	CTTR, Texas Southern University
Penney	Matt	General Manager	Longview Transit
Pettigrew	Chris	Product Manager	Mentor Engineering Inc.
Phillips	Rusty	Regional Services Director	Deep East Texas COG
Pledger	Rep	Director of Transportation	Collin County Area Regional Transit
Powell	James	Transportation Planner	NCTCOG
Pugh	Lynda	Rural Transit District Manager	Ark-Tex COG
Raphael	David	Regional Ambassador	CTAA
Reyna	Tom	Assistant Director	LRGVDC Transit Services
Roberts	Robin	Chair	Citizens Advisory Comm - El Paso
Rodriguez	Juan	Program Coordinator	South TX Development Council
Ross	Tammy	Human Resources Director	Midland-Odessa UTD
Ruiz	Johnny		Middle Rio Grande Area on Aging
Rushing	Gary	Transportation Operations Manager	City of Tyler - Tyler Transit
Sagaribay	Armida	Transportation Funding Specialist	TxDOT
Sarria	Vanessa	Executive Director	Community Action Network
Schwab	Bob	Regional Transportation Coordinator	El Paso County
Shelton	Paulette	Transit Director	Fort Bend County Public Trans
Sheppard	Leanna	Senior Planner	L&L Engineers & Planners
Smith	Tom	Executive Director	West Central TX COG
Spitz	Dale	Transportation Administrator	TxDOT
Stephens	Rob	Director	Concho Valley Transit District
Stevens	Kara	Public Information Planner	SE TX Reg Planning Comm
Stevenson	Serena	Director of Paratransit	Citibus
Stewart	Duncan	Research Engineer	TxDOT
Stockett	Susan	Planner	TxDOT

Last Name	First Name	Position	Organization
Stover	Linda	Manager of Paratransit and ADA	Corpus Christi Regional Trans Auth
Talbert	Julie	Manager	Heart of Texas Workforce Board
Teel	Jeanie	Executive Director	W Austin Faith in Action Caregivers
Telge	Judy	Executive Director	Coastal Bend Ctr for Indep Living
Thomas	Paul		Catholic Charities
Tickle	Melissa	Transit Accounting Specialist	Ark-Tex COG
Vail	Nick	Transportation Planner	NCTCOG
Varner	Jarod	Managing Director Bus Operations	Denton County Transportation Authority
Vasquez	Emma	Executive Director	Big Bend Community Action Comm.
Walton	Darla	Public Transportation Coordinator	TxDOT
Walton	Owetta	Transportation Coordinator	Ark-Tex COG
Walton	Karen	General Manager	First Transit
Warlick	Carole	General Manager	Hill Country Transit District
Warren	Paula	Executive Assistant	Harris County Judge's Office
Webb	Sandy	Public Transportation Operations Coordinator	Heart of Texas COG
White	Don	Transportation Coordinator	City of Mesquite
Williams	Beejay	Deputy Director	Workforce Solutions
Williams	Gary	Program Manager	TxDOT
Wolske	Jacque	Transportation Manager	Heart of Texas COG
Wright	Steve	Coordination Planner	TxDOT
Wright	Dandi		Sherry Matthews Advertising
Young	Cecile	Associate Commissioner	Health and Human Services Comm
Zarate Hodges	Nora	Planner	Nortex Reg Planning Comm



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