



# TDP & TDSP Coordination Guidebook

**FINAL**

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# TABLE OF CONTENTS

- Acknowledgments ..... iii**
- Section 1: Introduction ..... 1-1**
  - 1.1 Transit Development Plan Overview ..... 1-1
    - 1.1.1 TDP Components ..... 1-1
    - 1.1.2 TDP Guidance ..... 1-2
  - 1.2 Transportation Disadvantaged Service Plan Overview ..... 1-2
    - 1.2.1 TDSP Components ..... 1-2
    - 1.2.2 TDSP Guidance ..... 1-3
  - 1.3 Public Involvement ..... 1-3
    - 1.3.1 FPTA/FCTD Conference Session ..... 1-3
  - 1.4 Document Requirements Overview ..... 1-5
- Section 2: Existing Opportunities for Coordination ..... 2-1**
  - 2.1.1 Baseline Data, Conditions & Assessments ..... 2-2
  - 2.1.2 Existing Services & Performance Evaluation ..... 2-3
  - 2.1.3 Public Involvement ..... 2-4
  - 2.1.4 Situation Appraisal ..... 2-4
  - 2.1.5 Goals & Objectives ..... 2-4
- Section 3: Potential Component Coordination ..... 3-1**
  - 3.1 Proposed TDSP Best Practices ..... 3-2
    - 3.1.1 Baseline Data, Conditions & Assessments ..... 3-2
    - 3.1.2 Public Involvement ..... 3-3
    - 3.1.3 Situation Appraisal ..... 3-4
    - 3.1.4 System Mission & Goals ..... 3-5
    - 3.1.5 Mobility Needs & Demand Identification ..... 3-5
    - 3.1.6 Alternatives Strategies & Evaluations ..... 3-6
    - 3.1.7 Implementation Strategies, Progress & Tracking ..... 3-6
    - 3.1.8 10-Year Implementation & Financial Plan ..... 3-6
  - 3.2 Single Agency Coordination ..... 3-7
  - 3.3 Coordination for Separate Entities ..... 3-8
  - 3.4 Coordinating the Planning Process ..... 3-9
    - 3.4.1 MPO/TPO Support ..... 3-9
    - 3.4.2 MPO/TPO Funding Partner ..... 3-10
    - 3.4.3 MPO/TPO Lead ..... 3-10
    - 3.4.4 Rural Coordination ..... 3-10
- Section 4: Integration with Other Plans ..... 4-1**

- 4.1 Major Plans .....4-1
  - 4.1.1 Long Range Transportation Plan.....4-1
  - 4.1.2 Comprehensive Operational Analysis ..... 4-1
- 4.2 Minor Plans .....4-2
  - 4.2.1 Transit Asset Management Plan .....4-2
  - 4.2.2 Title VI Program & Analyses .....4-2
  - 4.2.3 Transportation Improvement Program .....4-2
- 4.3 Summary .....4-2

**Appendix A: Public Involvement Guidance**

**List of Figures**

- Figure 2-1: Existing TDP/TDSP Coordination Opportunities .....2-1
- Figure 3-1: Proposed TDSP Best Practices .....3-1

**List of Tables**

- Table 1-1: Current and Proposed TDP/TDSP Requirements and Best Practices ..... 6
- Table 3-1: TDP & TDSP Component Coordination for Single Agencies ..... 8
- Table 3-2: TDP & TDSP Component Coordination for Separate Agencies ..... 9
- Table 3-3: MPO/TPO Level of Involvement..... 9
- Table A-1: Potential TDSP Public Involvement Activities ..... A-1

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## SECTION 1: INTRODUCTION

In Florida, a Transit Development Plan (TDP) is required by the State for recipients of Public Transit Block Grant program funding and is regulated by the Florida Department of Transportation (FDOT). A Transportation Disadvantaged Service Plan (TDSP) is required for Community Transportation Coordinators (CTCs), as overseen by the Florida Commission for the Transportation Disadvantaged (FCTD). In an effort to move towards becoming true mobility managers, many transit systems have taken on the additional role of the CTC and must prepare and submit both TDPs and TDSPs to the State.

FDOT and FCTD have agreed to investigate ways to coordinate their TDP and TDSP planning efforts and activities to streamline the costs and better use planning resources. This guidebook shows current opportunities for better coordinating the TDSP with the TDP and includes guidance on how to implement the potential TDSP best practices identified through this effort.

### 1.1 Transit Development Plan Overview

A TDP serves as the basis for defining public transit needs, which is a prerequisite to receive State Block Grant funds. Florida's interest in TDPs is governed by Section 341.052, Florida Statutes (F.S.), as described in Florida Administrative Code (F.A.C.) 14-73.001, established in 1993 and last updated in 2007.

Beyond regulatory and administrative requirements, TDPs are intended to serve as 10-year strategic planning documents. They define public transportation needs, solicit broad input by coordinating with other plans, involve substantial public participation and explore community goals with decision-makers and other stakeholders, define alternative courses of action, and develop a systemic plan and monitoring program.

Major TDP updates are required every five years, with Annual Progress Reports (APRs) due for each of the four interim years between major updates. Major Updates and APRs must be submitted to and approved by FDOT.

#### 1.1.1 TDP Components

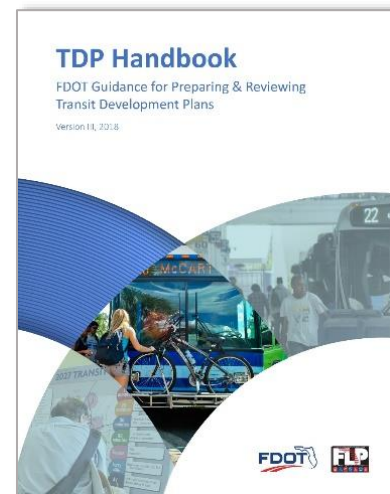
The components of a TDP are as follows and are discussed further in succeeding chapters:

- Baseline Conditions Assessment
- Existing Services & Evaluation
- Public Involvement
- Situation Appraisal
- Goals & Objectives
- Demand Assessment

- Alternatives Development & Evaluation
- 10-Year Transit Plan
- Plan Implementation & Coordination

### 1.1.2 TDP Guidance

FDOT released the [\*TDP Handbook: FDOT Guidance for Preparing & Reviewing Transit Development Plans \(Version III\)\*](#) in 2018, which provides a detailed review of TDP components and requirements and best practices for each and includes case studies, tips, quick references, checklists, graphics, and useful tools.



## 1.2 Transportation Disadvantaged Service Plan Overview

A TDSP is an annually-updated tactical plan developed jointly by a planning agency and the CTC. A new TDSP must be produced every five years to correspond with the CTC’s new contract, with minor updates occurring every year between. The plan is reviewed and approved by the Local Coordinating Board (LCB) and submitted to the FCTD.

Unlike a TDP, a TDSP is a tactical plan and has no legal standing to develop the system. However, it is intended that through the process outlined herein, a TDSP will likely change to become a more strategic development plan. Additionally, a TDSP is required of each CTC, including those operating in rural counties where other public transit systems do not.

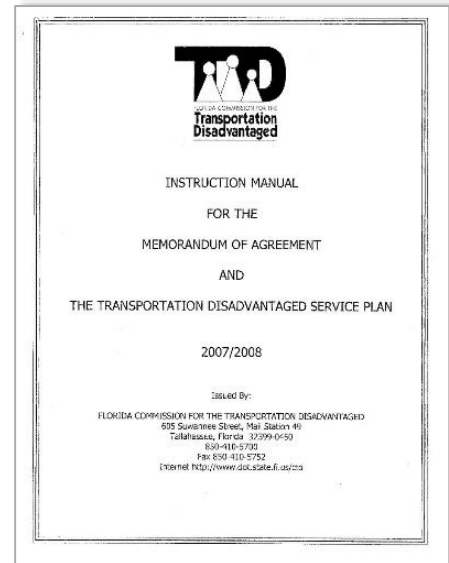
### 1.2.1 TDSP Components

The components of a TDSP are as follows and are discussed further in succeeding chapters:

- Part I: Development Plan
  - Introduction to the Service Area
  - Service Area Profile/Demographics
  - Service Analysis
  - Goals, Objectives, and Strategies
- Part II: Service Plan
  - Operations
  - Quality Assurance
  - Cost/Revenue Allocation and Rate Structure Justification

### 1.2.2 TDSP Guidance

Rule Chapter 41-2, F.A.C., describes the required duties of a CTC, including the components of the TDSP. FCTD offers additional TDSP guidance in the [Instruction Manual for the Memorandum of Agreement and the Transportation Disadvantaged Service Plan \(2007\)](#). The rule outlines certain service policies that must be incorporated into a TDSP that limit the document to being a tactical plan. Moving the TDSP to a more strategic plan for mobility development would mean that the tactical aspects of the TDSP would likely need to be moved into a new required Policy Plan, which should be a standalone policy manual, leaving the rest of the TDSP as more of a planning document like the TDP.



### 1.3 Public Involvement

#### 1.3.1 FPTA/FCTD Conference Session

Following are summary notes based on a discussion held on TDP/TDSP coordination at the Florida Public Transportation Association (FPTA)/FCTD 2019 Conference in Orlando in September 2019. Questions were asked to initiate group discussion, and miscellaneous discussion points from participants were presented at the end.



#### Overview

Representatives of the FDOT Public Transit Office and FCTD introduced the TDP/TDSP project. Tindale Oliver provided an overview of the TDP and TDSP processes and strengths, weaknesses, and opportunities related to each and then led a discussion to obtain input from participants for consideration when developing this guidebook. Approximately 50 persons participated in the session, including representatives of transit agencies, CTCs, Transportation Planning Organizations (TPOs), Metropolitan Planning Organizations (MPOs), other planning agencies, and FDOT staff. Input from the discussions included the following.

#### Single Document that Meets Both TDP and TDSP Needs

- A significant issue related to coordination is dealing with different due dates (June/September); the planning processes must be synchronized.

- Coordinating the two planning efforts makes more sense for transit agencies that are CTCs. The guidebook should demonstrate how others can benefit from better coordination of the plans even if they are not the transit agency and/or CTC.
- The approval process may need to be modified; approving both plans could take a long time.
- Some elements could be developed jointly but result in two planning efforts—for example, a transit/TD background document that includes baseline data, existing services and evaluations, public involvement, situation appraisal, etc., and a document including the remaining elements of the TDP and TDSP.
- The potential for enhanced coordination may be most beneficial because of public involvement, providing a great opportunity for TD education.
- Combining the two documents/plans could “politicize” the TDSP unnecessarily, as it currently is required to be approved by the LCB but not the County Commission. If the TDSP is combined with the TDP, approval by the County Commission may be required.
- At the State level, it would need to be determined if FDOT or FCTD have final approval of the combined plan, which could cause issues if both agencies approve but do not agree on the plan.
- Combining the plans/documents could bring more awareness to the TD population and the services provided, as not all public officials are involved with the TD aspect of transportation.
- It should be determined if both a TDP and TDSP are needed.
- Data requests should be minimized to save time, especially related to multiple plans.



### Florida Administrative Code vs. Guidance/Best Practices

- A “model” or example TDSP should be developed, as was done for the TDP manual. Current TDSP guidance is from 2007/08.
- This process could result in an opportunity for a rule change in the F.A.C. requirements for TDSPs in the future.
- The most recently-approved TDPs from all Florida transit agencies are available on [Planfortransit.com](http://Planfortransit.com); TDSPs will be available soon.

### **Needs Assessment, Assessing TD Effectively**

- Prior use of a Transportation Coordination Network (TCN) survey was noted; the St. Lucie TDSP is an example.
- Some prior plans have mapped TD origin-destination data compared to available fixed-route services to identify potential TD riders who, if able, could use fixed-route services instead; this could be done as a regular analysis in the TDSP.
- Some assessments could be optional for smaller/rural agencies.

### **Miscellaneous Discussion**

- There could be value in combining the TDP and LRTP planning processes and documents.
- For agencies with small staffs, concurrently developing a TDP and a TDSP may be overwhelming.
- Differences between TD and ADA trips, rates, certifications, processes, etc., should be considered.
- TD, ADA, and human services trips/travel need to be better defined and differentiated.
- Possible additions to the TDSP include peer analysis and a rider guide/operations element.

## **1.4 Document Requirements Overview**

Table 1-1 provides an overview of components currently required or considered best practices for TDPs and TDSPs and indicates components proposed to be added to the TDSP as best practices.

**Table 1-1: Current and Proposed TDP/TDSP Requirements and Best Practices**

Report Component	Component Elements	Current TDP	Current TDSP	Proposed TDSP
		✓ Requirement	✓ Best Practice	
<b>Baseline Data, Conditions &amp; Assessments</b> 	Background of Program/Transit System	✓	✓	
	CTC Designation History	-	✓	
	Organization Chart	-	✓	
	Demographic Data	✓	✓	
	Socioeconomic Data	✓	✓	
	Employment Data	✓	✓	
	Major Trip Generators/Attractors	✓	✓	
	Land Use/Growth Characteristics	✓	✓	
	Travel/Mobility	✓	-	✓
<b>Existing Services &amp; Performance Evaluation</b> 	Existing System Profile	✓	✓	
	Inventory of Available Transportation Services	✓	✓	
	Trend Analysis	✓	✓	
	Peer Review Analysis	✓	✓	
	Aspirational Peer Review	✓	✓	
	Farebox Report	✓	-	
	Performance Monitoring	✓	✓	
	CTC Evaluation Process by LCB	-	✓	
	Operational Characteristics	-	✓	
<b>Public Involvement</b> 	Approved Public Involvement Plan	✓	✓	
	Technical Review Team	✓	✓	
	Visioning with Elected Officials/Boards	✓	-	✓
	Minimum 14-Day Notifications for Public Events	✓	✓	
	Opportunities for Public Involvement Outlined in PIP	✓	-	✓
	Solicitation of Comments from Regional Workforce Board	✓	-	
	Advising FDOT, Workforce Board, MPO of Public Meetings	✓	-	✓
	Review Opportunities to FDOT, Workforce Board, MPO	✓	-	✓
	Pre-TDP Outreach and Post-Adoption Public Outreach	✓	-	✓
<b>Situation Appraisal</b> 	Plans & Policy Review	✓	✓	
	Implications of Socioeconomic Trends	✓	-	✓
	Travel Behavior/Patterns Implications	✓	-	✓
	Land Use Implications	✓	-	✓
	Implications of Community Feedback	✓	-	✓
	Organizational Issues	✓	-	✓
	Technology/Innovation Implications	✓	-	✓
	Regional Coordination Implications	✓	-	✓
	Funding Implications	✓	-	✓
	Transit-Friendly Land Use and Urban Design Efforts	✓	-	
10-Year Transit Ridership Projections	✓	-		

<b>System Mission &amp; Goals</b> 	Mission & Vision	✓	-	✓
	Goals and Objectives	✓	✓	
	Guiding Principles	✓	-	✓
	Implementation Schedule	-	✓	
<b>Mobility Needs &amp; Demand Identification</b> 	Traditional Markets	✓	-	✓
	Discretionary Markets	✓	-	
	Travel Markets	✓	-	✓
	Ridership Projections	✓	✓	
	Annualized Forecast of TD Population	-	✓	
	Needs Assessment	-	✓	
	Barriers to Coordination	-	✓	
<b>Alternatives Strategies and Evaluations</b> 	10-Year Alternatives	✓	✓	
	Public Outreach/Feedback	✓	-	
	Alternatives Evaluation	✓	✓	
<b>Implementation Strategies, Programs, Progress &amp; Tracking</b> 	Tracking & Monitoring	✓	-	✓
<b>10-Year Implementation &amp; Financial Plan</b> 	TDP Alternatives	✓	-	✓
	Financial Plan	✓	-	✓
	Financial Summary Presentation	✓	-	
	Implementation Plan	✓	-	✓
	List of Unfunded Needs	✓	-	✓
	Cost/Revenue Allocation, Rate Structure Justification	-	✓	
	Transit Governing Board Adoption	✓	-	
	LCB Review and Approval	-	✓	
	Marketing Program	✓	-	✓

## SECTION 2: EXISTING OPPORTUNITIES FOR COORDINATION

At a minimum, a transit agency can share components of a TDP that a TDSP also requires, whether or not the transit agency and the CTC are the same entity. These components are outlined in Figure 2-1 and described in more detail below.

**Figure 2-1: Existing TDP/TDSP Coordination Opportunities**



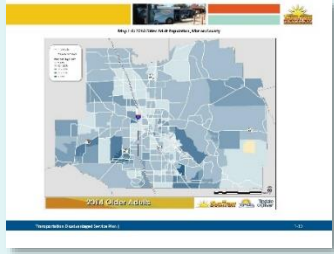


### 2.1.1 Baseline Data, Conditions & Assessments

The purpose of a baseline conditions assessment is to review the means of collecting and analyzing existing base data to gain an understanding of the environment in which a transit system is operating. In addition to the data inclusions customary for a baseline conditions assessment, emphasis is placed on incorporating new data sources or existing data to determine portions of the service area that are particularly conducive to transit. A transit agency can easily share the TDP elements noted below with the CTC so efforts are not duplicated for the TDSP.

**Baseline Data Coordination  
2018–2027 TDSP, Ocala/Marion County**

*In 2017, Ocala/Marion County completed its TDP and TDSP at the same time. In the 2018-2027 TDSP, many maps and demographics were taken from SunTran’s 2017 Major TDP Update.*



#### 2.1.1.1 Demographic, Socioeconomic & Employment Data Analysis

A demographic and socioeconomic analysis of the study area includes, at a minimum, the following elements for both the TDP and TDSP:

- *Population & Housing* – Population density is a key characteristic affecting transit use. Population density levels can be illustrated in map form for the study area and offer insight as to where residential development is concentrated.
- *Population Segments with Higher Transit Orientation*
  - *Populations Below Poverty* – Low-income households are a primary market segment of the traditional transit rider market when developing demand estimates for transit. This also applies to TD services, as income level is an eligibility requirement.
  - *Age Distribution* – Population age distribution, with emphasis on older adults (age 65 and older), is useful in determining additional mobility needs that could be met through transit services, as the older population is less likely to have access to a vehicle or prefer to drive. Age is also an eligibility requirement for using TD services.
  - *TD Population Trends* – Whether or not the transit agency is also the CTC, the rate at which the TD population is served may influence the demand for a transit agency’s regular transit services.
  - *Zero-Vehicle Households* – Although not necessarily identical to low-income areas, the locations of households with no access to a functional vehicle will overlap considerably.

- *Employment* – Employment locations and densities are important determining factors with regard to the extent to which transit can feasibly serve work trips effectively. For example, urbanized areas with significant levels of employment in a Central Business District (CBD) are more transit-friendly than those with more dispersed employment concentrations. This information also benefits TD services as it relates to the generation of TD trips.

### **2.1.1.2 Land Use Characteristics**

A review of major development activity can take a variety of forms depending on the general environment and trajectory of the study area, e.g., is it increasing in population or becoming a growing employment center? Although these macro trends may be readily apparent at the county level, it is important for both TDPs and TDSPs to take a closer look into exactly what type of development may be occurring (e.g., residential houses, apartments, offices, retail centers) and where they are relative to already-developed areas. A TDSP will mostly be concerned with existing and future sites for medical and multi-family residential, assisted living, etc.

Additionally, there may be large redevelopment projects or districts relevant to the study area. For instance, corridor redevelopment, Community Redevelopment Areas, and facility rehabilitations present potential challenges, opportunities, and areas for partnership for transit agencies that can be addressed in both documents.

### **2.1.1.3 Major Trip Generators/Attractors**

Major trips generators and attractors, also known as activity centers, are places within a community that have a strong attraction for resident travel either for employment or patronage purposes, such as medical facilities, recreational areas, educational establishments, shopping centers, and clusters of government services or business offices. These activity centers have an impact on the coordinated transportation system that is not typical of employers, residential areas, or surrounding land uses. Consideration of these areas may be necessary to take advantage of potential transit and TD trips. It is likely that a TDP and TDSP for a particular county will have similar activity centers; however, some that are geared toward the TD population might need to be added (i.e., dialysis center, senior center, etc.)



### **2.1.2 Existing Services & Performance Evaluation**

Currently, the only element of the Existing Services section of a TDP that applies to a TDSP is the inventory of available services, which can easily be shared with the CTC so efforts are not duplicated. The inventory is a concise review of other public transportation providers, including private providers, regional transportation (e.g., interstate bus and rail services), commuter transportation (e.g., vanpools), and any known app-based ride-hailing services that mimic transit (e.g., Uber Express Pool).



### 2.1.3 Public Involvement

Conducting public outreach serves the critical role of engaging the community and incorporating their opinions into the transit planning process. There are many proven practices in this arena, and new technologies and innovative practices continue to emerge that enable agencies to better maximize participation, reach new audiences with online tools, and improve education efforts, all with fewer resources. TDP and TDSP public involvement efforts can piggyback by adding TD-specific questions to surveys or include TD stakeholders in discussion groups. The transit agency can then share the mobility needs for the specialized markets (aging population, low-income population, persons with disabilities) with the CTC.

#### Coordinated Public Involvement Votran TDP & TDSP (2017), Volusia County

*In 2017, Votran completed a TDP and a TDSP in tandem. A joint TDP/TDSP presentation was given to the LCB.*



### 2.1.4 Situation Appraisal

A TDP situation appraisal analyzes factors within and external to a transit system. Currently, the only element that applies to a TDSP is the review of plans and policies. The transit agency can easily share this review with the CTC so efforts are not duplicated. If needed, the CTC can add TD-specific plans and policies.



### 2.1.5 Goals & Objectives

Many performance- and mobility-related goals and objectives will be similar for transit agencies and CTCs. Developing them jointly will allow both agencies to better rely on the community's services to help overall mobility needs and serve each other's clients more holistically. Some goals should focus on overall mobility for the community, and objectives should be specific to the public transit agency or the CTC based on type of service and the clients being served.

## SECTION 3: POTENTIAL COMPONENT COORDINATION

This section discusses TDSP best practices and how they can be coordinated with the TDP effort. Figure 3-1 shows potential components to be added to the TD planning process as best practices, as discussed in Section 1. Also discussed are how these best practices can be coordinated between the TDP and TDSP for counties in which the transit agency and the CTC are the same entity and where they are separate.

**Figure 3-1: Proposed TDSP Best Practices**





### Alternatives Strategies & Evaluations

- 10-Year Alternatives
- Public Outreach/Feedback
- Alternatives Evaluation



### Implementation Strategies, Progress, & Tracking

- Tracking & Monitoring



### 10-Year Implementation & Financial Plan

- Financial Plan
- Financial Summary Presentation
- Implementation Plan
- List of Unmet Needs
- Marketing Program

## 3.1 Proposed TDSP Best Practices



### 3.1.1 Baseline Data, Conditions & Assessments

The Travel and Mobility Characteristics section of a TDP includes primarily best practices, but it can be useful for a TDSP because any mobility-enhancing options available or changes could impact the TD system or TD clients. Travel and mobility characteristics include the following:

- **Journey-to-Work/Commute Patterns** – U.S. Census data on people’s means of travel and travel time to work provide information on the proportion of workers who drive alone, carpool/vanpool, use public transportation, bicycle or walk, or work at home and on how long it takes workers to get to their jobs.
- **Traffic Congestion** – An analysis of traffic congestion in the study area will identify areas in which roadways or roadway segments are deficient in terms of level of service (LOS). Deficient roadways or corridors can be targeted for increased transit services or for Transportation Demand Management (TDM) strategies to prevent further deterioration of the current LOS.
- **Connectivity Between Major Hubs** – The extent to which the transit network serves, or does not serve, the major generators and attractors is identified.

- **Parking** – Parking conditions in the study area and/or specific locations with major parking issues can affect transit use, as the location, availability, and cost of parking often will influence an individual’s travel mode choice.
- **First/Last Mile Connectivity** – The need to improve first/last mile connections within the transit network is a challenge faced by transit agencies across the country. The goal of this element is to determine how innovative service delivery options could be incorporated into existing and traditional transit networks.
- **Bicycle & Pedestrian Networks** – The study area’s pedestrian access and its relationship to activity centers and bus stops will have a great impact on the potential success of transit services.



### 3.1.2 Public Involvement

Currently, the TDSP process does not require an extensive public involvement effort.

Conducting public involvement serves the critical role of engaging the community and subsequently incorporating their opinions into the transportation planning process. There are many proven practices in this arena, and new technologies and innovative practices continue to emerge that allow agencies to better maximize participation, reach new audiences with online tools, and improve education efforts, all with fewer resources. Following recommended TDP public involvement process guidance, it is recommended that the following elements be added to the TDSP planning process as best practices:

- **Visioning with Elected Officials/Boards** – By engaging public officials in the outreach process, a TDSP can educate leaders on the needs of the community and potential improvements and solicit their feedback regarding other unmet needs.
- **Opportunities for Public Involvement Outlined in PIP** – A Public Involvement Plan (PIP) is a plan of action for engaging the public that outlines outreach techniques to be used throughout the planning effort. More information on how public involvement can benefit the TDSP process and how a TDSP can piggyback on TDP efforts is provided in Appendix A, Public Involvement Guidance.
- **Advising FDOT, Workforce Board, MPO of Public Meetings** – It is critical to involve these agencies in the planning of transportation services in a county or region to provide them with the opportunity to participate in any planned outreach activities.
- **Provision of Review Opportunities to FDOT, Workforce Board, MPO** – Review opportunities for these groups will allow them to comment on the planning process during the development of TDSP documentation and its key elements.
- **Pre-TDSP Outreach and Post-Adoption Public Outreach** – Conducting pre-outreach efforts to identify recently-completed public involvement can save costs and avoid

duplication of efforts such as a public survey. Additionally, continuing outreach efforts after the TDSP has been adopted can keep the effort from “losing steam” by continuing the relationships and dialogue initiated during the plan development process.



### 3.1.3 Situation Appraisal

A situation appraisal consists largely of information previously gathered for the preceding sections. Subsequent activities include identifying consequences of initial data collection and assessments and exploring possible strategies for changing the situation to benefit the transit system. Elements include the following:

- **Socioeconomic Trends** – Looking closely at socioeconomic trends offers an opportunity to identify key trends that may or may not be supportive of transit services. Based on these trends, areas with potential mobility needs may come into better focus.
- **Travel Behavior/Patterns** – Travel patterns for the study area can help identify transit service gaps and/or where latent demand may exist.
- **Land Use** – In reviewing land use elements, transit agencies should seek strategies that encourage higher densities and/or mixed uses that can assist the transit agency in operating more efficiently.
- **Community Feedback** – It is critical to review and assess key trends revealed from the public outreach conducted to develop an understanding of the community’s visions for transit and other mobility needs.
- **Organizational Issues** – The transit agency or CTC’s organizational structure influences its ability to function effectively and efficiently in serving the needs of its patrons. A high-level review of the overall structure and governance of both agencies can provide insight into potential issues or barriers affecting the provision of quality transit services.
- **Technology/Innovation** – Technology has greatly impacted transit services and the overall riding experience for passengers. Agencies should carefully consider the related costs for start-up, operation, and maintenance of any technology enhancements that may be desired.
- **Regional Coordination** – Regional coordination and planning are effective for transit only if the priorities and goals expressed by nearby entities are considered. A review of key priorities for regional entities can identify areas of potential coordination.
- **Funding** – By identifying additional local sources of funding, new avenues to use as a match for leveraging State and Federal funds can be accessed. Any applicable local mechanisms should be discussed.



### 3.1.4 System Mission & Goals

#### 3.1.4.1 Mission & Vision

Developing mission and vision statements is a required element of a TDP but not a TDSP. A vision statement is typically a brief, broad, and inspiring statement about what an organization wants to achieve; a mission statement expresses how the transit agency and/or the CTC will achieve its ultimate vision. It is recommended that development of these statements be implemented as a TDSP best practice and used as the foundation for development of goals and objectives, as they can encapsulate the CTC’s purpose and its ideal future.

#### 3.1.4.2 Guiding Principles

Guiding principles are extensions of the vision or mission statement that can serve to help frame the goals and objectives. As with a TDP, these principles should be implemented as a TDSP best practice, as it is desired that CTCs help better define their vision, mission, and goals and objectives.



### 3.1.5 Mobility Needs & Demand Identification

This component strives to quantify the mobility needs and develop transit demand estimates for the study area. Before transportation providers can begin to develop specific strategies to improve their system, there must be an accurate understanding of the existing demand for transit and TD services and the level and type of unmet mobility needs within the community. The purpose is to develop a series of transit alternatives based on preceding efforts and apply a rigorous ranking process to determine recommendations that can provide the greatest benefit to the community over the course of each plan horizon. Assessments relevant to TD services include the following:

- **Traditional Market** – This refers to population segments that historically have a higher propensity to use or depend on transit for their transportation needs (low-income, youth, older adults, zero-vehicle households).
- **Travel Markets** – Origin and destination grids can be developed using transit survey data, outputs from regional highway demand models, or paratransit pick-up and drop-off data. A summary of origin-destination pairs may reveal frequently occurring or “major” pairs, which can reveal potential demand for both fixed-route and TD transit services.

**Travel Market Analysis  
SCAT TDSP (2019), Sarasota County**

*In Sarasota’s 2019 TDSP, a sample of trip data was used to analyze the origins and destinations of TD clients and the most popular trip pairs.*



### 3.1.6 Alternatives Strategies & Evaluations

In a TDP, findings from baseline data assessments, outreach efforts, the situation appraisal, and mobility needs analyses all contribute to the development and evaluation of alternatives. The primary goal of this component is to develop potential alternatives to fulfill unmet transit demand and mobility needs. A TDSP currently does not include an alternatives development and evaluation component, but it should become a best practice. The main elements of this component are as follows:

- **Developing Alternatives** – A list of applicable alternatives should be developed to help meet mobility needs that are financially unconstrained (e.g., service, capital, technology, policy), those that may not be affordable now but may become implementable within the next 10 years if additional resources become available.
- **Public Outreach/Feedback** – Decision-makers and the public should be provided with the opportunity to comment on the alternatives developed during this phase of a TDP or TDSP. Any advisory board set up to oversee the TDP/TDSP process should have the same opportunity. Public meetings or workshops can provide a forum for presenting the identified alternatives and/or soliciting ideas for the evaluation process.
- **Alternatives Evaluation** – It is important to weigh the benefits of each service improvement to evaluate and prioritize them. By conducting an alternatives evaluation, projects can be prioritized, and available funding can be allocated using an objective improvement ranking process.



### 3.1.7 Implementation Strategies, Progress & Tracking

Developed goals and objectives should be accompanied by a monitoring program to assist in measuring a transit agency or CTC’s success in achieving them and identifying roadblocks that may hinder the achievement of their objectives. Continuous refinement and communication of goals and objectives and a regular monitoring program will enable the transit agency or CTC to adjust to a changing marketplace, identify areas of strengths and weaknesses, and reveal new opportunities for program and service excellence. With a clear understanding of the vision, mission, goals, and objectives and an expectation that performance is carefully monitored, organizations on which the transit agency or CTC relies for support can be confident that they are performing well and that financial resources are well spent.



### 3.1.8 10-Year Implementation & Financial Plan

A TDP’s 10-Year Transit Plan considers the priorities and alternatives developed in the context of the financial resources available to the transit agency, including current revenue sources, operating costs, and capital/infrastructure costs. It also proposes an acquisition/








construction schedule for the funded plan and may include a discussion of funding alternatives (including options for new or dedicated revenue sources). A TDSP currently does not include a financial component, but this could be a best practice to help address the unmet needs of the TD system. Important elements of the implementation and financial plans are as follows:

- **Financial Plan** – Provides the opportunity to match needed transit system improvements with available financial resources. Operating, capital, and policy costs are projected, and revenue sources are identified for the full 10-year horizon of the plan. The transit agency and the CTC can then determine which service improvements can be realistically achieved from a funding perspective and when those service improvements can be implemented.
- **Implementation Plan** – Outlines the service, capital, and planning/policy improvements/strategies identified as part of the funded 10-year transit plan and unfunded needs in a phased manner.
- **List of Unfunded Needs** – Highlights the operating, capital/infrastructure, planning, and policy needs for which funding sources have not been identified.
- **Marketing Program** – Could include an emphasis or expansion of general marketing efforts that transit agencies conduct to raise awareness of existing services, highlight the benefits of plan recommendations, and grow support for the implementation of the proposed alternatives after the plan’s adoption to help strengthen the position of transit and mobility within the community.

### 3.2 Single Agency Coordination

If the transit agency and the CTC are a single agency, coordinating TDP and TDSP efforts will be simple. Certain TDP components can be completed with fixed-route, paratransit, and TD services in mind that will make it easy to share between plans, thus avoiding duplication of effort. These components and the coordination process are outlined in Table 3-1. If the timelines of a TDP and TDSP coincide, the plans can be developed concurrently.

**Table 3-1: TDP & TDSP Component Coordination for Single Agencies**

Report Component	Coordination Process
 <b>Baseline Conditions</b>	Include baseline conditions section, as elements are valuable to both fixed-route and TD service and transit agency and CTC serve the same study area; add TDSP-specific sections.
 <b>Existing Services and Performance Evaluation</b>	Use existing services profile from TDP; TD-specific information may need to be added (TD Background, TD Trends, etc.)
 <b>Public Involvement</b>	Follow TDP format, with addition of outreach techniques geared toward TD clients and stakeholders.
 <b>Situation Appraisal</b>	Include all elements of situation appraisal in terms of fixed-route and TD services.
 <b>Goals &amp; Objectives</b>	Develop joint transit and TD-specific goals and objectives.
 <b>Alternatives Development and Evaluation</b>	Develop and evaluate TD alternatives with fixed-route needs during the TDP process.
 <b>Implementation and Finance Plan</b>	Develop finance and implementation plans for TD alternatives with fixed-route alternatives during the TDP process.

### 3.3 Coordination for Separate Entities

If a transit agency and CTC are separate entities, certain overlapping TDP and TDSP components can easily be shared between them. Table 3-3 outlines the components included in this section and the coordination process for each.

**Table 3-2: TDP & TDSP Component Coordination for Separate Agencies**

Report Component	Coordination Process
<b>Baseline Conditions</b>	Include elements of baseline conditions for fixed-route and TD service, as transit agency and CTC serve same study area.
<b>Existing Services &amp; Performance Evaluation</b>	Use most recent TDP list of existing transportation services for TDSP; add TD-specific services.
<b>Public Involvement</b>	Follow TDP public involvement format; add outreach techniques geared toward TD clients and stakeholders.
<b>Situation Appraisal</b>	Adapt TDP situation appraisal and plans & policy review into TDSP; although transit agency not responsible for TD service, TDP can take TD services into consideration when developing the situation appraisal.

### 3.4 Coordinating the Planning Process

MPO/TPOs have varying levels of involvement in the TDP and TDSP processes. For instance, MPO/TPOs are often the Designated Official Planning Agency (DOPA) by the FCTD and will have a more defined role in a TDSP. Additionally, MPO/TPOs can take on a larger role in a TDP depending on the level of funding they are providing or the interlocal agreement they have with the transit agency.

Table 3-2 shows how MPO/TPOs can be involved with each document component whether supporting the effort, a funding partner, and/or leading the document effort.

**Table 3-3: MPO/TPO Level of Involvement**

Report Component	MPO/TPO Support	MPO/TPO Funding Partner	MPO/TPO Lead
Baseline Conditions	✓	✓	✓
Existing Services Evaluation			✓
Public Involvement	✓	✓	✓
Situation Appraisal		✓	✓
Goals & Objectives	✓	✓	✓
Transit Demand Assessment			✓
Alternatives Development & Evaluation	✓	✓	✓
10-Year Transit Development Plan		✓	✓

#### 3.4.1 MPO/TPO Support

At a minimum, an MPO/TPO can support a joint TDP/TDSP by offering assistance and review/input with the Baseline Conditions, Public Involvement, Goals & Objectives, and Alternatives Development & Evaluation components. MPO/TPOs possess a wealth of baseline data collected for a range of transportation studies, corridor analyses, maps, and, in particular, the urbanized area’s Long Range Transportation Plan (LRTP). MPO/TPOs also typically play a role in the public

involvement process by participating on a technical review committee, taking part in stakeholder meetings, or attending discussion groups/public workshops. When conducting a TDP, the transit agency typically takes the lead role in formulating the goals and objectives, but it also must involve external partners such as MPO/TPOs to the greatest extent possible. This collaboration offers the ability to positively impact an MPO/TPO’s constituents, and, in turn, support the transit agency’s overall vision and mission.

### **3.4.2 MPO/TPO Funding Partner**

Partnering with the MPO/TPO to fund a TDP helps agencies develop it on a constrained budget. This may also give the MPO/TPO a bigger role in supporting the effort and a more vested interest in the planning process and the TDP results. As a funding partner, the MPO/TPO should have more input on the overall process, especially in developing and prioritizing alternatives for the 10-year plan. It also helps ensure the MPO/TPO’s involvement, as required in F.A.C. 14-73.001, for the minimum public involvement activities for the TDP.

For a TDSP, State funding is provided to the MPO/TPO (as DOPA) by FCTD for certain elements of planning, including the CTC evaluation section of the TDSP. Although certain elements are a CTC requirement, some MPO/TPOs further assist CTCs by completing additional elements of the TDSP. This provides more consistency and helps ensure adequate coordination with the LCB.

### **3.4.3 MPO/TPO Lead**

Having the MPO/TPO lead the effort means that it will be coordinating and leading the full plan, with input from the transit agency and/or the CTC. There are several examples of an MPO/TPO leading the TDP and TDSP processes, and the resulting plans are more consistent and/or coordinated.

### **3.4.4 Rural Coordination**

In rural areas in which MPOs do not exist, coordination should occur with the DOPA on receiving input and data regarding mobility needs of the community and supporting development of service alternatives and implementation strategies. Each DOPA is different and may provide varying levels of support, but it should be an early and recurring partner for any CTC in its TDSP development process. Note that many rural counties have urban boundaries that overlap with neighboring counties, and the corresponding MPO may be able to assist with certain input and data regarding mobility needs.

## SECTION 4: INTEGRATION WITH OTHER PLANS

This section provides a brief overview of how TDP and TDSP components can be shared with other transit plans. Components and data from a TDP and a TDSP can be fed into other major plans, LRTPs, and Comprehensive Operational Analyses (COAs) in addition to smaller planning documents such as Transit Asset Management (TAM) Plans and Title VI Programs/Analyses. A TDP and a TDSP can influence the analysis and decision-making process for these other plans and allow them to build upon the recommendations and lessons to help further advance community goals and priorities.

### 4.1 Major Plans

#### 4.1.1 Long Range Transportation Plan

Public transportation is an important component of a community’s multimodal LRTP, which includes a transit needs assessment, an alternatives evaluation, and a transit cost affordable finance plan. MPO/TPO efforts in preparing the transit element of an LRTP can be coordinated with the transit agency and leverage the alternatives and recommendations from the most recent TDP Major Update. Additionally, TD population forecasts from a TDSP can be used to estimate future populations lacking access to transit. The amount of TD service needed in the future will vary in part with changes in the size and reach of the countywide bus network.

#### 4.1.2 Comprehensive Operational Analysis

A COA evaluates a transit agency’s current transit operations at a single point in time and then determines how best to improve its operations in the near term. When conducting a COA, agencies may find the greatest benefit by performing a single planning effort that includes first conducting a COA followed by a TDP. The findings of the COA can be fed into a TDP’s capital and operational recommendations for the initial part of the 10-year plan. A hybrid TDP that combines most of a completed COA effort may also be an option.

There is a cost saving benefit to conducting a COA and a TDP in tandem. Although most analyses for each effort remain separate, cost savings can be found in related elements, project management, data collection, and public outreach efforts.

Overall mobility improvements planned through a COA that target paratransit riders likely will provide benefit to both the TD population served by the CTC and transit system riders. As appropriate, paratransit and mobility improvements from a TDP and/or a TDSP that benefit the TD population should also be considered for inclusion in COA recommendations to continue the effort of planning for the entire transportation system.

## 4.2 Minor Plans

### 4.2.1 Transit Asset Management Plan

A newer requirement for transit agencies is a TAM Plan. For many agencies, coordinating and possibly integrating TDP and TAM efforts could make sense, as both are designed to govern investment strategies based on needs. Specifically, the first four years of a TDP’s 10-year finance plan can be integrated into a TAM Plan to reflect reasonable annual performance targets for each asset class. A TAM Plan can also use a TDP’s Cost Feasible Plan to determine which capital assets can be funded over the TAM Plan horizon and which unfunded assets will be placed on a backlog.

### 4.2.2 Title VI Program & Analyses

Upon completion and adoption, a TDP and TDSP serve to document how the system will meet the needs of and serve citizens with disabilities, older adults, and populations that fall under Title VI protections. The analyses completed during these efforts can be used to help update required plans for ADA access and Title VI service provisions, including service and fare equity analyses in addition to the Title VI Program. Population and demographic data collected for the TDP and TDSP efforts can be fed into the analysis elements of these documents. For equity analyses, ridership data collected from TBEST for a TDP effort can be used to determine the impact of service changes on minority and low-income communities.

### 4.2.3 Transportation Improvement Program

Every MPO/TPO is required to develop an annual Transportation Improvement Program (TIP), a short-term listing of upcoming surface transportation projects that receive federal funds, including transit projects proposed for the service area. This means the TIP must be developed in cooperation with public transit providers. Funded projects developed in the TDP can be fed into the local MPO/TPO TIP. Local TIPs are then integrated into FDOT’s Statewide Transportation Improvement Program (STIP).

## 4.3 Summary

Going a step further to coordinate the TDP and TDSP with other transportation plans can have similar benefits to all agencies involved. Ensuring that such planning efforts are coordinated and support each other make for a more cost-efficient process and produce overall more consistent documents. Agencies are encouraged to look at every opportunity for coordination in order to see the benefits discussed throughout this guidance.

## APPENDIX A: PUBLIC INVOLVEMENT GUIDANCE

This public involvement guidance workbook was designed to be a standalone guide and compiles recommendations and guidance for public involvement activities for Transit Development Plans (TDP) and Transportation Disadvantaged Service Plans (TDSP). Specifically, guidance on planning, conducting, managing, reporting, and conducting joint TDP/TDSP activities is provided.

### Public Involvement Toolbox

Numerous public input activities and strategies from the TDP process can be used to engage the community and gather public feedback on TD services. Table A-1 shows public involvement activities that can potentially be added to the TDSP process and/or coordinated with a TDP. These activities are described in more detail below and provide guidance on implementation and coordination.

**Table A-1: Potential TDSP Public Involvement Activities**

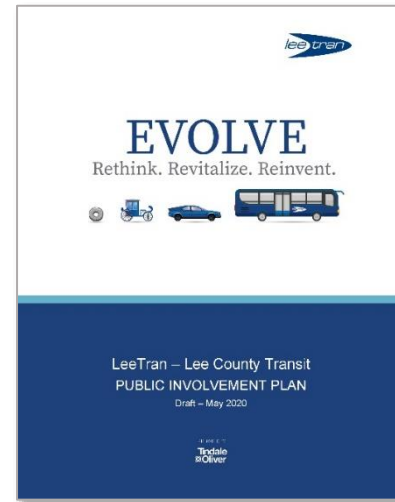
Public Involvement Activity	Relative Cost	Relative Effort	TDP Coordination
Public Involvement Plan	Low	Low	✓
Technical Review Team	Low	Low	✓
Stakeholder Interviews	Medium	Medium	✓
Surveys	Varies	Varies	
On-Board Bus Survey	High	High	✓
General Public – Online	Low	Low	✓
General Public – Paper	Low	Medium	✓
Mail Out	Medium	Medium	
Telephone	Medium	Medium	
Public Workshops	Varies	Varies	
Open-House	High	Medium	✓
Traditional	High	High	✓
Discussion Groups	High	High	✓
Board Visioning Workshop	Medium	Medium	
Social Media	Low	Low	✓*
Agency Website	Low	Low	✓*
Newspaper/Media	Low	Low	
Ongoing Comments	Low	Low	
Committee/Board Meetings	Medium	Medium	✓

\* If the transit agency is the CTC

## Public Involvement Plan

The first step of public outreach is to develop a plan of action for public involvement. For a TDP, transit agencies can either develop a TDP-focused Public Involvement Plan (PIP) or use an approved local MPO/TPO Public Participation Plan (PPP). The development of a robust PIP that is customized to the unique goals and constraints of the TDP and the transit agency’s operating environment is strongly encouraged to maximize the resources dedicated to reaching meaningful audiences.

If the CTC plans to conduct extensive public involvement for a TDSP, a PIP specific to the TDSP should be developed. However, if the CTC plans only to enhance the public involvement process of a TDSP, it can piggyback on certain TDP activities.



*LeeTran TDP Public Involvement Plan*

## TDP/TDSP Technical Review Team

A Technical Review Team (TRT) can be established early in the TDP or TDSP development process and structured similar to that of a project oversight team to help guide the overall Plan process, review key materials, and provide feedback. A TRT may be composed of representatives from the transit agency/CTC, the local MPO/TPO, FDOT, the CTD, the regional workforce board, City/County officials, and/or community stakeholders; the total size of the team should be limited to about 5–7 members to ensure that the benefits of the TRT are not encumbered by too many voices and the team can enable efficient execution of the Plan.

## Stakeholder Interviews

Conducting interviews with representatives of key public and private sector stakeholders is a vital component to obtain feedback about perceptions and attitudes towards transportation in a community and will enhance the understanding of local conditions from those who rely on transit. This activity is standard during the TDP public involvement process, and 10–15 stakeholder interviews typically are sufficient. As identified by the transit agency, stakeholders can include local officials, jurisdictional representatives, and organizations with an interest in transit services. Interview scripts with detailed questions related to public transportation in the study area may be used to gather the opinions and perceptions of these stakeholder groups. The CTC can conduct its own stakeholder interviews for the TDSP, or TD-specific stakeholders can be added to the TDP effort.

## Transit Surveys

Surveys are an effective tool for obtaining information about potential transit service improvements, assessing travel characteristics and perceptions of bus riders, and ascertaining other important feedback about public transportation from other stakeholders, such as non-users and/or major employers in the community. Feedback from surveys can assist transit agencies in identifying potential future transit needs. Common survey tools used by transit agencies during the TDP process are summarized below.

### On-Board Survey

On-board surveys are used by most transit agencies to gather feedback directly from their patrons on various aspects of their operations and services. This information is extremely useful to determine how the transit agency can improve and/or ensure the quality of its services. Typical aspects that should be covered by an onboard survey include the following:

- *Travel Characteristics* – questions about individual trip attributes.
- *Rider Demographics* – questions about who is using the system.
- *Customer Service & Opinions* – questions about potential service improvements and customer service preferences.

An on-board survey can be conducted for a TDSP process or can be coordinated with a TDP public involvement effort if the transit agency is the CTC or if TD clients use public transit (such as through a bus pass program). When coordinating with a TDP, TD-specific questions can be added to the survey.

### General Public Survey

This type of survey is used to gather information from public workshop attendees and other willing public participants. During public events, paper or tablet -based surveys are offered for non-user surveys and often are distributed electronically to event attendees, stakeholders, and email lists and posted on transit agency websites and social media to ensure a diversity of non-user opinions.

The survey form should be clear, concise, and simple for easy completion, with space included for more extensive comments or suggestions. Questions on the survey can vary depending on the phase of public outreach (e.g., initial needs gathering or alternatives feedback collection). Typical questions also attempt to gauge the relative support for transit within the community and a ranking of transit service attributes that are important to the respondent (such as friendliness of transit operators, safety of bus stops, reservation process).

As with an on-board survey, the CTC can distribute a public survey for the TDSP process, or TD-specific questions can be added to the TDP public survey.

## Mail-Out Survey

A mail-out survey is a traditional method for obtaining relative information from a large target population. If sampling is to be used, a random selection scheme should be used to ensure statistically-valid results. Surveys can be widely distributed, and the cost of the survey can be kept low if included as part of the distribution of a utility bill or other mechanism. Mail-out surveys typically cover most of the same topics as other transit surveys, albeit on a smaller scale.

It should be noted that the response rate for a mailout survey is generally low (often 10% or less). Therefore, the number of surveys to be distributed should be carefully determined to ensure that final results are statistically valid. It also is important to make the mail-out survey form as concise and user-friendly as possible to help encourage participation. To help improve response rate, return postage should be provided in advance via metering.

## Household Telephone Survey

Although not used as frequently due to cost and set-up logistics, a telephone-based household survey can be used by transit agencies as a tool for gathering input primarily from riders. Similar to an on-board survey, this household survey can help the transit agency assess travel behavior, characteristics, and passenger satisfaction. Data obtained from a household telephone survey can be used to identify program improvements that may better help meet the needs and demands of riders.

The image shows a sample of the SCATPlus Passenger Survey form. The form is titled "SCATPlus Passenger Survey" and includes the SCATPlus logo. It contains nine numbered questions with multiple-choice options. The questions cover topics such as passenger age, mode of transport, frequency of use, satisfaction with service, and overall opinion of the service. The form also includes a section for comments.

**SCATPlus TDSP telephone survey instrument**

## Public Workshops

Public workshops can be hosted to solicit ideas, opinions, and comments regarding transit needs and vision from the general public. Two types of public workshops could benefit a TDSP—an open house or a traditional workshop. A TDSP can piggyback on the efforts of a TDP for both of these types of workshop options by incorporating topics and issues that directly affect the TD community.

## Open House

An open house is typically the most flexible public workshop format in that it allows participants to observe displayed information at their own pace. The public is encouraged to arrive at the

designated workshop location at any time during the duration of the scheduled open house rather than a specific time.

The facility should be set up with several stations, each addressing a separate issue, so that several people can view a particular station at once. Depending on staffing availability, it is helpful to populate each station with staff who can explain the topic at hand to the public and answer any related questions. Staff also should be present to explain the format of the open house to arriving participants and ask them to sign in at the door.



*Pasco TDP Public Workshop at a Saturday market*

Open houses provide an opportunity for the public to address a problem in stages, and they also help prevent an individual or single interest from dominating a discussion and help ensure that more perspectives are heard.

### **Traditional Workshop**

A traditional public workshop may have a more formal format than the casual setting of an open house. Typically, a formal presentation is included in the agenda with a set time, or an information “looped” slideshow runs throughout the workshop. Most materials and input-gathering techniques used at open houses, such as display boards and surveys, are also used in a traditional workshop.

### **Discussion Group Workshops**

Discussion group workshops are invitation-based group workshops involving a group of participants (usually 8–12 persons) in an intimate meeting setting that promotes more in-depth, open-ended discussion about issues, needs, and opportunities from the perspectives of non-transit users. Participants could include members of the business, health, social services, TD, older adult, and education communities as well as active stakeholder groups. TDSP public involvement efforts can piggyback on TDP efforts by including TD participants in a group discussion.

### **Board Visioning Workshops & Committee/Board Meetings**

By including local political leaders in the outreach process, TDPs and TDSPs can educate leaders on the needs of the community and potential transit improvements and gather their informed feedback regarding unmet needs. Engaging political leaders in the early phases of outreach,

especially through the use of visioning workshops, is important for ensuring that they understand the nature and reason for the plan. Additionally, early engagement of an oversight board through a visioning workshop allows the transit agency to understand the board’s priorities for the future of transit service in its jurisdiction. Creating and preserving local allies for a TDP or TDSP is a helpful approach to ensuring that recommendations developed for local needs achieve consensus and are adopted.

### Social Media

The use of social media such as Facebook, Twitter, and YouTube during the last decade has demonstrated their ability to function as communication tools for more than just individuals. The following should be considered to maximize the value of using social media:

- **Existing Pages/Accounts** – Instead of creating a new standalone social media page or account for a project, consider using existing pages with established followers and a recognized brand. A dedicated page within an existing site or a project-specific hashtag or equivalent can be created to help designate project-specific materials and communications.
- **Advertising/Boosters** – Paying for advertisement boosters on Facebook and other social media has been effectively used to draw attention to online surveys and in-person events. Online advertising is a moderately-priced means of reaching target audiences.

### Agency Websites

A well-established and used transit agency and/or CTC website can provide a medium for TDSP outreach efforts. Similar to social media efforts, adding content such as updates, documents, event information, and survey links are low-cost efforts that may spark discussion, bolster turnout/response rates, and raise awareness about the TDSP or the transit agency. Although not every online user who visits a webpage consumes substantial content, the opportunity to raise awareness and enhance education are long-term payoffs that justify the effort and expense.

### Print Media

Print media such as newspapers may not reach as wide an audience as it did in the past, but they remain an effective method to reach citizens, especially because most newspapers are also available online. Newspaper ads and articles on the TDSP outreach can generate significant awareness if timed correctly and target specific audiences.

### Ongoing Public Comments

It is important to emphasize that public involvement is an ongoing process; feedback and comments about service should be collected by the transit agency or CTC throughout the year.

Comments can be received from the public periodically via e-mail, mail, and telephone. Appropriate feedback for a TDSP update process would include suggestions that go beyond existing daily operations. Examples include recommendations for new service, service expansions, and/or additional transit infrastructure. This feedback should be integrated into the TDSP preparation process as appropriate.

In addition to input received directly, agencies should assess input/findings from transit-related study efforts that are ongoing or have been recently completed.

### Summary

Similar to coordinating other components of the TDP and the TDSP, coordinating public involvement for the two efforts is the most practical approach because it benefits both agencies by providing an advantage to identifying mobility needs that affect both the transit agency and the CTC in a cost efficient way. Agencies are encouraged to look at every opportunity for coordination in order to see the benefits discussed throughout this guidance.