TDP HANDBOOK TRAINING AGENDA

• Welcome!
• Introductions
• Training Overview
  • TDP Preparer’s Guide (8:30 AM – 12:30 PM)
  • TDP Reviewer’s Guide (1:30 – 3:00 PM)
• What to Expect from Today’s Training
• Some Housekeeping Items
• Let’s Develop the Next Generation of TDPs!!
TDP HANDBOOK PROJECT TEAM

TDP PREPARER’S GUIDE

- TDPs in Florida - A Success Story
- Why Update the TDP Handbook?
- 2018 TDP Handbook - What is New?
- Chapter Overviews
- Interactive Exercises
- Questions/Discussions
- Wrap Up
TDPs IN FLORIDA - A SUCCESS STORY

Basis for Defining Public Transit Needs
Not just a prerequisite for receiving state funds

Planning, Development & Operational Guidance Document
Strategic blueprint for meeting the mobility needs within a service area

Powerful Promotional/Marketing Tool
Consistent catalyst for general education and awareness on transit

HISTORY OF FDOT’S ASSISTANCE WITH TDPs
WHY UPDATE TDP GUIDANCE IN 2018?

- A lot has changed in last decade
  - Operating environments
    - Funding constraints
    - Economic growth
    - Demographic trends
    - Regionalism in planning
  - Technology
  - Public outreach techniques
  - Data visualization tools
  - Best practices - Better ways of doing business

2018 TDP HANDBOOK - WHAT’S NEW?

- New Features
- New Additions
- New Graphics
- New Format & Structure
NEW ADDITIONS

• New TDP Section on “Plan Implementation & Coordination”
**PLAN IMPLEMENTATION & COORDINATION**

- New Section Topics
  - Beyond TDP Adoption
    - Role of TDP Executive Summary
  - Plan Coordination
    - COAs, studies, marketing efforts
  - Plan Integration
    - Informing other plans

**NEW ADDITIONS**

- New Chapter on “Annual Progress Reports” (APRs)
NEW FEATURES

• Case Studies

Provide tangible examples of TDP best practices along with a discussion of when such techniques are most appropriate and the possible benefits that these may confer to the transit agency.
NEW FEATURES

• TDP Tips

Quick tips and key points for efficiently completing key aspects of the TDP, as well as innovative ways to save time and resources while achieving the same or better results.

NEW FEATURES

• Chapter Look-ups

Table of Contents at the beginning of each chapter/key TDP component
NEW FEATURES

• TDP Rule Quick Reference Guide
  • For locating guidance on TDP Rule-required components

NEW FEATURES

• TDP Rule Requirement Vs. Best Practice Checklists
  • Clarifies whether a TDP element is considered “required” by the TDP Rule or simply a best practice
NEW FEATURES

• Public Involvement Toolbox
  • Relative cost & effort
  • Participation potential

2018 TDP HANDBOOK - WHAT’S NEW?

New Features

New Graphics

New Additions

New Format & Structure
NEW GRAPHICS

Flow Charts  
Mapping Techniques  
Data Visualization  
Report Samples

2018 TDP HANDBOOK - WHAT’S NEW?

New Features  
New Additions  
New Graphics  
New Format & Structure
NEW FORMAT & STRUCTURE

Concise Format
- 4 Chapters
  - Ch. 1-2 on TDP context
  - Ch. 3 on Major Updates
  - Ch. 4 on APRs

User-Friendly
- Easy to navigate
- Emphasizes key concepts

Online Resources
- Embedded links
- Guidance on data sources

NEW FORMAT & STRUCTURE

- Chapters 1 & 2
  - Emerging Trends
  - Challenges to Expanding Transit
  - Plan Development & Adoption
  - Beyond Adoption
  - Coordination with FDOT
NEW FORMAT & STRUCTURE

• Chapter 3
  • Each TDP component in detail
  • Case studies, tips, flow charts, checklists

NEW FORMAT & STRUCTURE

• Chapter 3
  • Use of visuals & graphics for easy grasp of concepts/ideas/examples
NEW FORMAT & STRUCTURE

• Chapter 4 - TDP Annual Progress Report
  • Key Objectives
  • Requirements & Format
  • Main Components
  • Why? - Benefits
  • FDOT Approval Process

NEW FORMAT & STRUCTURE

• Chapter 4
  • What the APR is & is not
  • Rule requirement vs. best practice for APRs

<table>
<thead>
<tr>
<th>TDP Annual Progress Report</th>
<th>TDP Rule Required</th>
<th>Best Practice</th>
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<tbody>
<tr>
<td>TDP Annual Progress Report Checklist</td>
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<td>Brief System Overview with Map</td>
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<td>Public Involvement Summary</td>
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<td>Previous Year Accomplishments/Progress Summary</td>
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<td>TDP Costs, Objectives, and Policies Assessment</td>
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<td>Revised 10-Year TDP Implementation Plan</td>
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<td>Revised 10-Year Costs and Revenues/Financial Plan</td>
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CHAPTERS 1 & 2 - PURPOSE & PROCESS

PURPOSE OF THE TDP

- Requirement for Funding
- Strategic Blueprint
- Marketing/Promotional Tool
NEW ERA OF OPPORTUNITIES

Complete Streets  TNC/Ride-hailing  FM/LM Services  Social Media  Autonomous Vehicles

System Reimagining  Mobile Fares  ... and growing!

CONTINUED CHALLENGES

Funding
Declines in federal/state/local sources

Perception
Attracting new ridership
WHERE DO WE GO FROM HERE?

- **Leverage** emerging trends (aging population, urban development)
- **Align** resources to meet community’s needs
- **Promote** the role of transit
- **Pursue** new funding opportunities
- **Market** the benefits of transit
- **Explore** new partnerships and technologies
**PILLARS OF A GOOD TDP**

- Effective Public Engagement
- Local Emphasis with Region in Mind
- A Strategic Blueprint
- Unconstrained Vision Vs. Attainable Targets
- A Living Document

**INTEGRATING NEW OPPORTUNITIES**

<table>
<thead>
<tr>
<th>Complete Streets</th>
<th>TNC/Ride-hailing</th>
<th>FM/LM Services</th>
<th>Social Media</th>
<th>CV/AV</th>
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<tbody>
<tr>
<td>New Policies on Complete Streets</td>
<td>Potential for Complementary Partnerships</td>
<td>Improving Modal Connectivity</td>
<td>Reach New Audiences &amp; Cost Savings</td>
<td>Cost, Efficiency, and Safety Improvements</td>
</tr>
</tbody>
</table>
CHAPTER 3 - PLAN DEVELOPMENT

THE NEXT GENERATION OF TDPs IN FLORIDA

...are tasked with exploiting these opportunities and addressing the challenges, so that the TDP can lead to a clear identification of transit needs in a community-wide context; a prioritized listing of recommended actions; a more favorable attitude toward transit by residents, riders, and decision-makers; and a stronger competitive position for the transit agency in obtaining additional funding.
TDP COMPONENTS

Baseline Conditions Assessment
Establish a benchmark of conditions and trends within the operating environment. This assessment enables the agency to identify the community’s transit goals.

Existing Services and Performance Evaluation
Review key operating characteristics and current provision of services in order to identify areas for improvement and benchmark performance against peer systems.

Public Involvement
Solicit, analyze, and incorporate public input and opinion into the transit planning process to determine needs and goals and, ultimately, prioritize improvement alternatives.
BASELINE CONDITIONS ASSESSMENT

• Objectives
  • Profile operating environment
  • Select foundational assessments
  • Educate public
  • Identify unique constraints/opportunities

BASELINE CONDITIONS ASSESSMENT

• Required by TDP Rule or Best Practice

<table>
<thead>
<tr>
<th>Baseline Conditions</th>
<th>TDP Rule Required</th>
<th>Best Practice</th>
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<td>Demographic</td>
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<tr>
<td>Socioeconomic</td>
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<td>Land Use</td>
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<tr>
<td>Growth</td>
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<tr>
<td>Travel/Mobility</td>
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</tbody>
</table>
**BASELINE CONDITIONS ASSESSMENT**

- Demographic/Socioeconomic Characteristics
- Land Use/Growth Characteristics
- Travel/Mobility Characteristics

**DEMOGRAPHIC/SOCIOECONOMIC CHARACTERISTICS**

- Define & Describe Study Area
- Population & Housing
- Population Segments with Higher Transit Orientation
  - Population Below Poverty
  - Zero-Vehicle Households
  - Affordable Housing
  - TD Population Trends
  - Season Populations
- Employment
- Age Distributions
- Income Levels
- Vehicle Availability
- Educational Attainment
- Labor Force Participation/Unemployment Rate
SUGGESTED DATA SOURCES

AMERICAN COMMUNITY SURVEY
U.S. CENSUS BUREAU

BUREAU OF ECONOMIC AND BUSINESS RESEARCH

A CLOSER LOOK

Population Segments with Higher Transit Orientation

- Map low-income population and affordable housing concentrations using ACS or local data
- Track the seasonal changes in population
- Monitor levels of TD population and percent of market needs met using AOR data

Vehicle Availability

- Map vehicle ownership concentrations using ACS or local data
- Monitor trends in vehicles per household
- Determine availability of car sharing opportunities
**BASELINE DATA FINDINGS CAN SAVE RESOURCES**

- **SunTran 2018-2027 TDP, Ocala/Marion County, FL**
  - Identified shift sizes, shift time changes, expansion plans, and key transportation challenges for employees as part of employer interviews
  - Later, the TDP affirmed the need to serve new industrial complex
  - SunTran was able to modify existing services to meet this need during specific times (e.g., shift changes) during the day

**LAND USE/GROWTH CHARACTERISTICS**

- Macroeconomic Indicators
- Development Activity
- Activity Centers/Major Hubs
- Employment by Industry
- Major Employers
- Existing & Future Land Use
- Land Use Patterns & Scenarios
**A CLOSER LOOK**

**Major Employers**
- Identify major employers, industry, occupation types
- Determine shift change times
- Begin target list of employers to partner with on general promotions, passes, or employee surveys

**Development Activity**
- Identify ongoing or planned major development activities
- Determine existing facility plans to accommodate transit service (e.g., bus stops, bays, etc.)
TRAVEL/MOBILITY CHARACTERISTICS

• Journey-to-Work/Commute Patterns
• Traffic Congestion
• Connectivity Between Major Hubs
• Parking
• First Mile/Last Mile Connectivity
• Bicycle & Pedestrian Networks

SUGGESTED DATA SOURCES

Local CMPs
Local Parking Plans

Bike/Ped Plans

Local & Regional LRTPs
A CLOSER LOOK

**Journey-to-Work/Commute Patterns**
- Longitudinal Employer-Household Dynamics (LEHD) and Longitudinal Origin-Destination Employment Statistics (LODES) data from “OntheMap” U.S. Census Bureau
- Data are used to determine commuting flows by:
  - County
  - City
  - Census Place

**Bicycle & Pedestrian Networks**
- Identify existing and planned intermodal connections
- Locate gaps and needs in connections
- Examine accessibility of networks along key transit routes
- Calculate actual bike/ped travel times
- Document amenities for bike/ped travelers

LEVERAGING FM/LM DATA

**ECAT 2017-2026 TDP, Escambia County, FL**
- Leveraged new data sources that may be available depending on ride-hailing company and area
- Examined "hot spot" maps provided for Uber drivers to understand where and when demand was greatest
- ECAT was able to identify the areas and times of day that transit may be needed
- Separately, Uber coordinated with the local airport to coordinate pick-up/drop-off areas, presenting further opportunities to coordinate with transit going forward
EXISTING SERVICES & PERFORMANCE EVALUATION

• Objectives
  • Profile existing service and performance
  • Analyze “Hows” and “Whys” of system operating trends
  • Current and/or aspirational peer comparisons
  • Review and report of farebox recovery
  • Performance evaluation to set goals and objectives
  • Help establish/update TDP goals and objectives

EXISTING SERVICES & PERFORMANCE EVALUATION

• Required by TDP Rule or Best Practice

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<th>Service Performance Evaluation</th>
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<td>Trend Analysis</td>
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<tr>
<td>Peer Review Analysis</td>
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<tr>
<td>Aspirational Peer Review</td>
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<tr>
<td>Farebox Report</td>
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</table>
EXISTING SERVICES & PERFORMANCE EVALUATION

- Existing System Profile
- System Trend Analysis
- Peer Selection & Reviews
- Farebox Recovery Analysis

EXISTING SYSTEM PROFILE

- Service Overview
- Fixed-Route Transit Service Profile
  - Route Performance Evaluation
- ADA Paratransit Service Profile
- Capital/Infrastructure Overview
- Other Providers of Public Transportation
A CLOSER LOOK

Fixed-Route Profile

- Showcase performance in helpful, creative ways for public education and easier identification of needs
- Rank and compare individual routes
- Identify areas of opportunity

SYSTEM PERFORMANCE EVALUATION

- Recommended Performance Measures
- Trend Analysis
- Peer Selection & Review
- Aspirational Peers
## RECOMMENDED PERFORMANCE MEASURES

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<tr>
<th>General Measures</th>
<th>Effectiveness Measures</th>
<th>Efficiency Measures</th>
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<td>Local Contribution</td>
<td>Average Age of Fleet (in years)</td>
<td>Average Fare</td>
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<td>Passenger Fare Revenues</td>
<td>Average Headway (in minutes)</td>
<td>Farebox Recovery (%)</td>
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<tr>
<td>Passenger Miles</td>
<td>Average Speed (RM/RH)</td>
<td>Operating Expense Per Passenger Mile</td>
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<tr>
<td>Passenger Trips</td>
<td>Average Trip Length (in miles)</td>
<td>Operating Expense Per Passenger Trip</td>
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<tr>
<td>Revenue Hours</td>
<td>Passenger Trips Per Revenue Hour</td>
<td>Operating Expense Per Revenue Hour</td>
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<tr>
<td>Revenue Miles</td>
<td>Passenger Trips Per Revenue Mile</td>
<td>Operating Expense Per Revenue Mile</td>
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<td>Route Miles</td>
<td>Passenger Trips Per Service Area Capital</td>
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<td>Service Area Population</td>
<td>Revenue Miles Between Failures</td>
<td>Revenue Miles Per Vehicle Mile</td>
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<td>Service Area Population Density</td>
<td>Revenue Miles Between Incidents</td>
<td>Vehicle Miles Per Gallon</td>
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<td>Service Area Size (square miles)</td>
<td>Revenue Miles Per Route Mile</td>
<td>Vehicle Miles Per Kilowatt-Hour</td>
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<td>Spare Ratio (%)</td>
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<td>Weekday Span of Service (in hours)</td>
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<td>Total Employee FTEs</td>
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<tr>
<td>Total Operating Expense</td>
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<tr>
<td>Vehicle Hours</td>
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<tr>
<td>Vehicle Miles</td>
<td></td>
<td></td>
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<tr>
<td>Vehicles Available for Max. Service</td>
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<tr>
<td>Vehicles Operated in Max. Service</td>
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## TREND ANALYSIS

- Minimum 3-year trend
- Analysis of prior 5-year trend recommended, but longer trend okay if desired
- Data sources
  - FTIS, NTD, transit agency (for the most recent year)
- Using validated NTD data is recommended
PEER REVIEWS

- Selecting your peer systems
  - TCRP-based peer selection process (TCRP Report 141)
  - May use other methods
- Use most recent year with validated NTD data
- Data source - FTIS

TREND & PEER REVIEWS - PRESENTING YOUR FINDINGS

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<td>Passengers (M)</td>
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<td>3,684</td>
<td>3,695</td>
<td>3,705</td>
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<tr>
<td>Revenue (M)</td>
<td>1,511</td>
<td>1,526</td>
<td>1,555</td>
<td>1,568</td>
<td>1,580</td>
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<tr>
<td>Average Age</td>
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<td>32.8</td>
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<td>1,278</td>
<td>1,291</td>
<td>1,304</td>
<td>1,317</td>
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<tr>
<td>Passenger Mile</td>
<td>24.8</td>
<td>24.7</td>
<td>24.6</td>
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<td>Revenue per Mile</td>
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<td>Revenue per Employee</td>
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<td>Revenue per Employee, MI</td>
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TREND & TRENDS

Operating Expense per Revenue Mile:

- 2013: $1,265
- 2014: $1,278
- 2015: $1,291
- 2016: $1,304
- 2017: $1,317

Average Age:

- 2013: 33.0
- 2014: 32.9
- 2015: 32.8
- 2016: 32.7
- 2017: 32.6

Revenue:

- 2013: $1,511
- 2014: $1,526
- 2015: $1,555
- 2016: $1,568
- 2017: $1,580

Passengers:

- 2013: 3,705
- 2014: 3,684
- 2015: 3,695
- 2016: 3,705
- 2017: 3,705
PRESENTING PEER CHOICES & PROCESS MORE EFFECTIVELY

• HART 2018-2027 TDP, Hillsborough County, FL
  • Used 8-variable peer selection process customized based on agency needs and data available
  • Developed visuals to clearly communicate to their community and stakeholders the variables and the process used in TDP peer selection

FUTURE PEER COMPARISONS

• PCPT 2014-2023 TDP, Pasco County, FL
  • Conducting a secondary peer review analysis with “aspirational” peers can help agencies chart a path forward
  • Based on expectations of dramatic population growth, the agency sought to identify areas that their area would be similar to 10+ years in the future
  • Improved ability to make sense of population and employment projections
  • Allowed PCPT to set better GOPs and identify areas where their performance was currently unbalanced
FAREBOX RECOVERY RATIO REPORT

• Florida HB 985 & FDOT Requirement
  - This legislation amended s. 341.071, Florida Statutes (F.S.), requiring transit agencies to “… specifically address potential enhancements to productivity and performance which would have the effect of increasing farebox recovery ratio”
  - FDOT subsequently issued guidance requiring the TDP and each annual update to include a 1- to 2-page summary report on the farebox recovery ratio and strategies implemented and planned to improve it as an appendix item

FAREBOX RECOVERY RATIO REPORT

• Calculate the current farebox recovery ratio
• Identify recent fare studies, changes, and upcoming fare changes
• Provide strategies to improve farebox recovery
  - Monitoring programs, new pass programs, employer partnerships, mobile fare collection, promotional efforts
PERFORMANCE EVALUATION TO SET GOALS & OBJECTIVES

- Inform/update TDP goals and objectives
- Identify areas for improvement
- Set targets for different transit services or routes
- Leverage analysis findings into actionable data

PUBLIC INVOLVEMENT

- Objectives:
  - *Educate public* – communicate results of earlier outreach to the public in a clear and concise manner
  - *Solicit feedback* – gather feedback and priorities in a variety of ways from a number of audiences to develop accurate recommendations and ensure support
  - *Integrate into TDP* – incorporate public feedback into the TDP regularly and at a number of intervals (i.e., situation appraisal, alternatives development)
  - *Monitor efforts* – measure effectiveness of outreach to reach a wide audience and to garner sufficient participation
  - *Promote transit* – emphasize the benefits of transit to the community and identify local champions to help ensure support
### TDP PUBLIC INVOLVEMENT

- Required by TDP Rule or Best Practice

<table>
<thead>
<tr>
<th>Public Involvement</th>
<th>TDP Rule Required</th>
<th>Best Practice</th>
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<tbody>
<tr>
<td>Approved TDP Public Involvement Plan (PIP)</td>
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<tr>
<td>Establish TDP Technical Review Team (TRT)</td>
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<td>TDP Visioning with elected officials/boards</td>
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<tr>
<td>Minimum 14-day notification for events open to the public</td>
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<tr>
<td>Opportunities for public involvement outlined in PIP</td>
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<tr>
<td>Solicit comments from regional workforce boards</td>
<td></td>
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<tr>
<td>Advise FDOT, regional workforce board, MPO of public meetings</td>
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<tr>
<td>Provide review opportunities to FDOT, regional workforce board, MPO</td>
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<tr>
<td>Pre-TDP outreach and post-adoption public outreach</td>
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### TDP PUBLIC INVOLVEMENT

- TDP Public Involvement Plan
- Outreach Guide for Agencies
- Key Regulatory Requirements
- Public Involvement Toolbox
TDP PUBLIC INVOLVEMENT PLAN (PIP)

- Develop one for the TDP or use an existing one
- Includes details of activities proposed for the TDP
- Use project scope as a guide
- Include tentative schedule for the activities
- Send to FDOT for approval
- Receive approval early in the process

PUBLIC INVOLVEMENT – THINGS TO REMEMBER

- PIP approved by FDOT
- Solicit comments from the local/regional workforce board
- Advise FDOT, workforce board, and MPO of all public meetings
- Provide FDOT, workforce board, and MPO an opportunity to review and comment on:
  - TDP goals and objectives
  - Transit alternatives
  - 10-year implementation program
OUTREACH GUIDE FOR AGENCIES

- Establish a Technical Review Team
- Strategize Location Selection
- Leverage Technology
- Consult Research
- Start Early
- Ensure Inclusive Representation
- Use Branding
- Evaluation
- Rely on a Toolbox Approach
- Conduct Post-Adoption TDP Outreach
- Leverage Technology
- Use Right Timing & Channels
- TOOLKIT

A CLOSER LOOK

Location Selection
- Ensure accessibility by transit
- Disperse across the study area
- “Piggy-back” on other community events, markets, and existing activity centers

Leveraging Technology
- Collect data using tablets, smartphones
- Reach more people using social media
- Reach audiences typically not engaged
- Reduce outreach costs
PUTTING TECHNOLOGY TO WORK FOR YOU

Branding
• Improve recognition of TDP
• Enhance accessibility to public
• Open up the discussion more easily
• Strengthen likelihood of implementation

Pre/Post-TDP Outreach
• Review previously conducted outreach data/findings
• Improve continuity, pool outreach efforts
• Maintain momentum
• Achieve ongoing dialogue
BRANDING

• My Ride 2017-2026 TDP, Polk County, FL
  • Plan branding makes the unfamiliar notion of a TDP more accessible and memorable for all public participants regardless of their background
  • Branding helped improve awareness from an initial level of 10%. After the campaign, this number rose substantially, suggesting a greater familiarity with the transit agency
  • More than 75% agreed with the strategy of branding

EVENT PIGGY-BACKING

• BCT 2014-2023 TDP, Broward County, FL
  • Coordinating outreach schedules with already planned public/community events to maximize attendance, ensure diversity of opinion, and make efficient use of agency resources
    • Maximized outreach resources
    • Solicited diverse participation
    • Educated through engaging visual aids
    • Collaborated with other events to cross-promote attendance
    • Raised awareness among public not normally engaged in transit planning
PLANNING CHARRETTES

- MCAT 2019-2028 TDP, Manatee County, FL
  - Incorporating public outreach events that bring together participants of different backgrounds, promote engaging discussion, and produce quality ideas
    - Achieved attendance from a diverse set of stakeholders
    - Raised the profile of transit
    - Laid the foundation for partnerships with local leaders and employers
    - Provided opportunities for future cross-marketing efforts
    - Produced original ideas and priorities

ENGAGING ELECTED OFFICIALS

- SunTran 2018-2027 TDP, Ocala/Marion County, FL
  - Informing/educating elected officials early on about TDP
  - Get their direction/set visions for 10-year transit plan, as well as specific information on
    - Setting ridership growth objectives
    - Soliciting elected official priorities
  - In the end, the agency was able to succeed in
    - Educating about recent outreach
    - Engaging the key decision-makers
    - Developing powerful supporters of the TDP
HEAR DIRECTLY FROM THE PUBLIC

• Charlotte Rides 2015-2024 TDP, Charlotte County, FL
  • Allowing decision-makers and elected officials to hear directly from the words of the public the value of transit services amplified the confidence in the agency’s plan
    • Allowed elected officials to hear “directly” from the public
    • Educated about recent outreach
    • Engaged the key decision-makers

REGULATORY REQUIREMENTS

• In addition to the TDP Rule, there are a few more regulatory requirements related to public outreach for TDPs
  • Federal
    • Title VI of the Federal Civil Rights Act of 1964 mandates non-discrimination by race, color, or national origin in connection with programs and activities receiving federal financial assistance. Title VI also requires access to information and services for individuals with Limited English Proficiency (LEP).
    • Executive Order 12898 on Environmental Justice (1994) requires measures to avoid disproportionately high adverse environmental effects of federal programs through full and fair participation of low-income and minority communities.
    • Chapter 286, Florida Statutes (a.k.a. Florida Sunshine Law) demands public access to governmental meetings at the state and local level and demands meetings of boards and commissions to be open to the public, adequately noticed, and recorded via minutes.
  • Local
    • Adhering to local rules/guidelines on public involvement announcement/advertisement time period, etc.
    • Following the deadlines for Board review/comment periods
TDP OUTREACH PHASES

Phase Zero
- Review Recent Efforts

Phase I
- Identify Needs

Phase II
- Review and Rank Priorities

Post-TDP
- Help Implement Adopted TDP

PUBLIC INVOLVEMENT TOOLBOX

- Outreach Activities
  - Ideal Phase
  - Relative Cost
  - Relative Effort
  - Participation Potential
PUBLIC INVOLVEMENT TOOLBOX

- Outreach Activities
  - Ideal Phase
  - Relative Cost
  - Relative Effort
  - Participation Potential

SELECTING OUTREACH TECHNIQUES - EXAMPLE

<table>
<thead>
<tr>
<th>Technique</th>
<th>Pros</th>
<th>Cons</th>
<th>Cost</th>
<th>Value to Transit Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder Interviews</td>
<td>• Gather opinions of local influencers</td>
<td>• Narrow pool of attendees</td>
<td>Medium</td>
<td>Very High</td>
</tr>
<tr>
<td></td>
<td>• Determine priorities of key transit advocates</td>
<td>• Discussions can be subject to individual personalities</td>
<td>Low</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Establish key relationships</td>
<td></td>
<td>High</td>
<td>Very High</td>
</tr>
<tr>
<td>Open House Public Workshops</td>
<td>• Reach diverse audiences not typically exposed to transit</td>
<td>• Participants may not fully understand what is asked of them</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Can include educational components</td>
<td>• Requires coordination/preparation</td>
<td>Very High</td>
<td>High</td>
</tr>
<tr>
<td>Social Media</td>
<td>• Low costs/barriers to entry</td>
<td>• Transactional and informal in nature</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td></td>
<td>• Ability to interact in real-time</td>
<td>• Input may not be well-thought out</td>
<td>Very High</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Incorporates new, young audiences</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On-Board Survey</td>
<td>• Reach large target audience</td>
<td>• Participants tend to have shorter horizons in identifying solutions</td>
<td>High</td>
<td>Very High</td>
</tr>
<tr>
<td></td>
<td>• May encourage written response</td>
<td>• Subject to survey errors</td>
<td>Very High</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Gather opinions of regular users</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bus Operator Surveys</td>
<td>• Obtains information directly from bus operators on improving services</td>
<td>• Operators often reluctant to complete survey</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td></td>
<td>• Useful for verifying passenger input and identifying safety issues</td>
<td>• May want to focus on unrelated topics</td>
<td></td>
<td>High</td>
</tr>
</tbody>
</table>
Success of transit depends on your community’s support! Listen to them!

Engaging Our Community

To prepare a TOD reflective of the Hillsborough County community, an extensive public outreach process was conducted, as summarized below. The process included three key phases and was geared to ensure that feedback from the public and stakeholders could be received and accumulated.

1. **Community Network Events**
   - Key points to note: Network and public LiCal are collected at a variety of locations, including hamlets/community centers and at local events. As part of the expected public outreach phase, we ensure artificial, active public feedback.

2. **Public Meetings**
   - Key points to note: We sought input from business, industry, government, and civic leaders, in addition to community leaders. Major area employers such as Amtrak, and UCF also participated in several activities where they showed interest.

3. **Interactive Surveys**
   - Key points to note: Two initial (8) interactive surveys were conducted to seek input. Later, a more extensive survey was created to seek public assistance, with providing recommended areas. A separate report provided surveys and interviews with leaders to improve insights and engage.

The TOD outreach also made extemal use of an online website presence, sociability, and social media, such as twitter and websites, including Facebook, Live, and others. The goal was to engage as many audiences as possible for this TOD.

INTERACTIVE EXERCISE
TDP COMPONENTS

Situation Appraisal
Synthesize how baseline conditions along with land use/design, government policies, organizational challenges, and technological advances impact how the transit agency should plan for the future.

Goals and Objectives
Articulate goals, objectives, and policies that set the framework for the agency to meet community needs via guiding internal and external actions and initiatives.

Demand Assessment
Conduct assessments of transit rider demand for specific market segments using forecasting tools to inform decision-makers about the trade-offs of multiple service scenarios.

SITUATION APPRAISAL

- Objectives
  - Analyze the effects of land use, relevant plans, governmental actions and policies, and operating environment implications for the transit system
  - Assess the extent to which the land use and urban design patterns in the provider’s service area support or hinder the efficient provision of transit service
  - Estimate the community’s demand for transit service using the planning tools provided/approved by FDOT
SITUATION APPRAISAL

- Required by TDP Rule or Best Practice

<table>
<thead>
<tr>
<th>Situation Appraisal</th>
<th>TDP Rule Required</th>
<th>Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plans and Policy</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Socioeconomic Trends</td>
<td>✔️</td>
<td></td>
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<tr>
<td>Travel Behavior/Patterns</td>
<td></td>
<td>✔️</td>
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<tr>
<td>Land Use</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Community Feedback</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Organizational Issues</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Technology/Innovation</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Regional Coordination</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Funding</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Transit-Friendly Land Use and Urban Design Efforts</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>10-Year Transit Ridership Projections</td>
<td></td>
<td>✔️</td>
</tr>
</tbody>
</table>

SITUATION APPRAISAL

- Assessment of Operating Environment
- Land Use & Urban Design Implications
- Estimation of Demand for Transit
ROLE OF SITUATION APPRAISAL

ASSESSMENT OF OPERATING ENVIRONMENT

• Plans & Policy Review
• Socioeconomic Trends
• Travel Behavior/Patterns
• Land Use
• Community Feedback
• Organizational Issues
• Technology/Innovation
• Regional Coordination
• Funding
A CLOSER LOOK

Plans/Policy Review

- Develop a good understanding of how other plans and policies interrelate, coordinate, and/or complement or contradict with the TDP’s own goals and efforts
- Look for and identify goals/objectives/policies that can enhance or deter the transit agency from operating in the most effective and efficient manner possible

Socioeconomic Trends

- Use findings from baseline conditions analysis to identify key trends that may or may not be supportive of transit services
- Socioeconomic trends also can reveal which areas may not be experiencing conditions that are less supportive for transit service
- An appraisal of these data allows for the identification of implications on the future of transit in the community and the region

EVIDENCE

A CLOSER LOOK

Organizational Issues

- Transit agency’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 the transit agency can provide insight into potential issues or barriers affecting the provision of quality transit services

Technology/Innovation

- Transit agencies are likely in to be in some phase of consideration, procurement, and/or implementation of technologies that will improve their services
- Need to consider the related overall costs for start-up, operation, and maintenance of any technology enhancements
- For example: ITS, CV/AV, mobile fare, and TNC partnerships
LAND USE & URBAN DESIGN IMPLICATIONS

• Local Transit-Friendly Planning Efforts
• Trends in Design
• Assessment of Alignment of Investment Priorities
• Identification of Complementary Efforts

A CLOSER LOOK

Transit-Friendly Planning Efforts

• Identify efforts to promote transit-friendly environments
• Gain insight into areas of opportunity
• Set groundwork to collaborate and build partnerships
• Identify hurdles in Land Development Regulations (LDRs)
ESTIMATION OF DEMAND FOR TRANSIT

• FDOT-Provided/Approved Method
  • Paired with other tools in transit demand assessment

CUSTOMIZING SITUATION APPRAISAL TO CATER TO UNIQUE OPERATING ENVIRONMENTS

• My Ride 2017-2026 TDP, Polk County, FL
  • The situation appraisal is intended to be a flexible component of the TDP and enable agencies to address the unique conditions of their operating environment.
  • Unique conditions evaluated by My Ride TDP include:
    • Safety and Operational Considerations
    • Activity Centers and Connectivity Analysis
    • Commuting/Travel Patterns
    • Multimodal Networks
    • Existing System Analysis
TRANSIT FRIENDLY DESIGN GUIDELINES

• **PCPT 2019-2028 TDP, Pasco County, FL**
  - In Pasco County, PCPT worked with the Pasco County MPO to link its TDP to the Transit Infrastructure Design Manual that Pasco County is currently developing.
  - Provides an example of how a TDP’s impacts can be maximized and coordination between land use and design regulations can result in new means of improving the attractiveness of transit services.

GOALS & OBJECTIVES

• Objectives
  - Serves as a roadmap for agency
  - Clarify community’s vision and goals
  - Leverage existing goals and efforts
  - Establish ongoing monitoring process
GOALS & OBJECTIVES

- Required by TDP Rule or Best Practice

<table>
<thead>
<tr>
<th>Goals &amp; Objectives Element</th>
<th>TDP Rule Required</th>
<th>Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission &amp; Vision</td>
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<td></td>
</tr>
<tr>
<td>Goals &amp; Objectives</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Guiding Principles</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Tracking &amp; Monitoring</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

TDP GOALS & OBJECTIVES

- Develop/Update Vision & Mission
- Develop Goals & Objectives
- Tracking & Monitoring
DEVELOP VISION & MISSION

• What is a vision statement?
  • Indicates end goals and achievements
  • “What will our success look like?”
  • Realistic and credible
  • Easy to understand
  • Guide to action

• What is a mission statement?
  • Concise, straightforward reason for existence
  • Verbalizes direction & purpose
  • Defines goal for daily accomplishments
  • “Who are we?”

DEVELOP VISION & MISSION

• Leverages...
  • Situation Appraisal
  • Local Coordination Efforts
  • Agency’s History
• To establish a guiding mantra for the future of the agency within its service area
DEVELOP VISION & MISSION

Example Vision Statement:

The preferred choice for connecting people and places, enhancing the community’s quality of life and economic vitality

Example Mission Statement:

XTransit provides safe, convenient, clean, reliable, courteous, accessible, and cost-effective public transit services to meet the needs of our residents, workers, and visitors. We will partner and collaborate to help guide land use decisions and support economic vitality and sustainability to enhance the overall quality of life in our community

DEVELOPING GOALS & OBJECTIVES

• Develop SMART Goals
  • Examine findings from TDP development thus far
  • Evaluate prior TDP goals and objectives
  • Consider performance measures

Example

<table>
<thead>
<tr>
<th>Goal</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase transit service options</td>
<td>Expand primary transit network beyond established corridors and consider new transit service types such as BRT</td>
</tr>
<tr>
<td>Policy</td>
<td>Prioritize new higher-density residential and employment corridors</td>
</tr>
</tbody>
</table>

Specific – What will the goal accomplish? How and why will it be accomplished?

Measurable – How will you measure whether or not the goal has been reached?

Achievable – Is it possible? Have others done it successfully? Do you have the necessary knowledge, skills, abilities, and resources to accomplish the goal?

Relevant – What is the reason, purpose, or benefit of accomplishing the goal? What is the result (e.g., not activities leading up to the result) of the goal?

Time-Bound – What is the established completion date and does that completion date create a practical sense of urgency?
VISION/DIRECTION FROM GOVERNING BOARDS

PCPT 2019-2028 TDP, Pasco County, FL

• Board support can help setting ridership growth and other performance goals
• Ensuring that the transit agency is pursuing goals and metrics that elected officials support is a key way to ensure support for the TDP
• PCPT received clear direction on ridership growth goals by educating and polling its MPO Board early in their TDP

TRACKING & MONITORING

• Creating Goals and Objectives is not enough...
  • Need to establish a monitoring program to ensure progress and communication
  • Can be refined to meet changing community needs
DEMAND ASSESSMENT

- Objectives
  - Quantify need for public transit
  - Provide basis for alternatives development
  - Ensure responsiveness to community’s needs
  - Enable agency to gauge benefits of investments
  - Enable evaluation of service proposals and tradeoffs
  - Estimate extent of need and how effectively it is met

TRANSIT DEMAND ASSESSMENT

- Required by TDP Rule or Best Practice

<table>
<thead>
<tr>
<th>Transit Demand Assessment</th>
<th>TDP Rule Required</th>
<th>Best Practice</th>
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</thead>
<tbody>
<tr>
<td>Traditional Markets</td>
<td>✔️</td>
<td></td>
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<tr>
<td>Discretionary Markets</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Travel Markets</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Ridership Projections</td>
<td>✔️</td>
<td></td>
</tr>
</tbody>
</table>
DEMAND ASSESSMENT

- Traditional Markets
- Discretionary Markets
- Travel Markets
- Ridership Projections

TRADITIONAL RIDER MARKETS

- Populations with higher propensity to use transit
  - Use ACS data
  - Data from local studies
  - Developing an index/database of geographic location is key

- Low Income Population
- Youth
- Zero Vehicle Households
- Older Adults
DISCRETIONARY RIDER MARKETS

• Populations in higher-density areas that may choose transit
  • Density information from local/regional studies
  • Market studies on discretionary riders
  • Millennial “Gen Y” location and travel preferences

TRAVEL MARKETS

• Mapping Origins & Destinations
  • Bus Trips
    • Via passenger surveys
  • Automobile Trips
    • Via travel demand models
  • Current & Future Estimates
    • Regional model data
RIDERSHIP PROJECTIONS

When Considering a Forecasting Method to Use, Consider

- **Community Needs** - Service area including size, population, anticipated growth in the community, and interface with other area transit providers
- **Agency Capabilities** - The agency in-house staff and software capabilities or scale of services available through contract
- **Transit Growth** - The magnitude of the potential service change anticipated or possible in the 10-year timeframe being studied
- **Availability of Tools** - The presence of existing calibrated and validated forecasting tools for the service area
- **Availability of Data** - The availability of data to support various service demand estimating methods under consideration

TBEST - FDOT APPROVED METHOD

- **Ridership Demand Estimates**
  - Simulates travel demand at the stop-level while accounting for network connectivity, schedule variations (e.g., day of week, time of day, etc.), and route competition/complementarity
  - Near- and mid-term ridership estimates
  - Can be calibrated and/or validated to reflect local conditions
  - Ridership projections for validation year, base TDP year, and future scenarios
TBEST - FDOT RESOURCES & HELP

• TBEST.ORG Website
  • Software download
  • User guide
  • Training videos
  • Presentations
• TBEST seminar training opportunities announced by FDOT
• On-call technical support for Florida transit agencies

OTHER METHODS

<table>
<thead>
<tr>
<th>Elasticity of Demand</th>
<th>Regional Travel Demand Models</th>
<th>FTA’s STOPS Model</th>
<th>Comparable Route Method</th>
<th>Land Use &amp; Growth Trends</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Service and fare elasticities can project the effects on ridership of changes in fares and service</td>
<td>• For larger systems or those with rail services</td>
<td>• Used mainly for New Starts and Small Starts fixed-guideway project justifications</td>
<td>• For minor changes that may result in services similar to existing services/levels of performance</td>
<td>• Plan transit in response to land use patterns and decisions if history indicates density follows policy</td>
</tr>
</tbody>
</table>
USING OTHER METHODS

• Requesting Approval for an Alternative Ridership Estimation Method
  ✓ Author a letter of request directed to the public transit administrator at the FDOT District Office
  ✓ Indicate serious consideration of the approved as well as alternative methods
  ✓ Include a discussion of the proposed alternative method and the reasons why it is being proposed
  ✓ Talk to District personnel in advance of the request
  ✓ Allow District personnel 30 days to respond in writing
  ✓ Provide a copy of the District’s letter as an appendix in the submitted TDP

INTERACTIVE EXERCISE
TDP COMPONENTS

Needs Development and Evaluation
Refine and propose final service, capital, and policy/planning alternatives prior to evaluating and ranking the potential improvements needed.

Ten-Year Transit Plan
Develop the full 10-year plan, including estimates of operating/capital expenditures and revenue sources, as well as review related opportunities and constraints.

Plan Implementation and Coordination
Finalize a course of phased implementation that maximizes benefits for the community and leverages relationships necessary to ensure the success of the plan.

ALTERNATIVES DEVELOPMENT & EVALUATION

- Objectives
  - Review prior findings side-by-side
  - Leverage findings to identify improvements
  - Enable agency to meet unmet demand/needs
  - Use multiple identification and evaluation techniques to improve the eventual quality of the TDP
ALTERNATIVES DEVELOPMENT & EVALUATION

• Required by TDP Rule or Best Practice

<table>
<thead>
<tr>
<th>Alternatives Development &amp; Evaluation</th>
<th>TDP Rule Required</th>
<th>Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-Year TDP Alternatives</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Public Outreach/Feedback</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Alternatives Evaluation</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

ALTERNATIVES DEVELOPMENT & EVALUATION

- 10-Year Transit Needs Development
- Developing Alternatives
- Public Outreach/Feedback
- Evaluating & Prioritizing Alternatives
10-YEAR TRANSIT NEEDS

Where agency is going over the next 10 years & how it’s going to get there

Financially Unconstrained
Needs, not just what you can afford

10-YEAR TRANSIT NEEDS DEVELOPMENT

• To address unmet demand, community needs
• Need to consider
  • Service
  • Capital/Infrastructure
  • Technology
  • Policy
• Must comply with all local, state, and federal programs/policies, for instance, providing complementary ADA service for new fixed-route services
10-YEAR TRANSIT NEEDS DEVELOPMENT

• Primarily focused on meeting UNMET MOBILITY NEEDS!
  • Alternatives to meet these needs should be:
    • Strategic
    • Creative
    • Financially Unconstrained
  • So that they can be evaluated, prioritized, and if nothing else, included as an “unfunded need” for the future if the improvement scores high enough in the forthcoming evaluation

PUBLIC OUTREACH/FEEDBACK

• Go back to the community
• Provide opportunity to comment on alternatives
  • Decision-makers
  • Public
  • Workshops & surveys
  • Review committees
  • Advisory boards
• Rank alternatives/set priorities
EVALUATING ALTERNATIVES

• A three-step methodology is suggested to evaluate & prioritize transit alternatives
  • Define evaluation criteria & assign weights
  • Develop performance standards/thresholds
  • Conduct evaluation and produce a matrix of priorities
• Weigh the benefits of each service improvement against the full list of candidates to evaluate and prioritize

EVALUATING ALTERNATIVES

<table>
<thead>
<tr>
<th>Public Outreach</th>
<th>Transit Markets</th>
<th>Productivity &amp; Efficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Quantitative survey data</td>
<td>• Traditional &amp; discretionary</td>
<td>• Ridership potential</td>
</tr>
<tr>
<td>• Qualitative assessments</td>
<td>• Regional &amp; travel</td>
<td>• Operating cost per rider/hour/etc.</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Revenue Potential</td>
<td>Service Characteristics</td>
<td>Equity</td>
</tr>
<tr>
<td>• New funding potential</td>
<td>• Directness &amp; connectivity</td>
<td>• Transit dependent areas</td>
</tr>
<tr>
<td>• Local support</td>
<td>• Wait time &amp; transfer opportunities</td>
<td>• Average fare levels</td>
</tr>
</tbody>
</table>
PRESENTING THE COMPLETE SET OF NEEDS

- Objectives
  - Develop an implementation plan for priorities
  - Develop supporting financial plan
  - Be grounded in the unique operating environment and realistic set of revenue assumptions & estimates
  - Embody the transit agency’s vision & mission

TEN-YEAR TRANSIT PLAN
TEN-YEAR TRANSIT PLAN

• Required by TDP Rule or Best Practice

<table>
<thead>
<tr>
<th>10-Year Plan</th>
<th>TDP Rule Required</th>
<th>Best Practice</th>
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<tbody>
<tr>
<td>TDP Alternatives</td>
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<tr>
<td>Financial Plan</td>
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<tr>
<td>Financial Summary Presentation</td>
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<tr>
<td>Implementation Plan</td>
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<td></td>
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<tr>
<td>List of Unfunded Needs</td>
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<tr>
<td>Marketing Program</td>
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<td>✓</td>
</tr>
<tr>
<td>Performance Monitoring</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>

TEN-YEAR TRANSIT PLAN

- Recommended Alternatives
- TDP Financial Plan
- TDP Implementation Plan
- Monitoring Plan & Marketing Program
- List of Unfunded Needs
KEY ELEMENTS

Summary list of **Recommended Alternatives**, including service, capital/infrastructure, planning, and policy strategies

**10-Year Financial Plan** consisting of operating, capital/infrastructure/planning expenses developed with reasonable assumptions and available and anticipated financial resources

**10-Year Implementation Plan** for the funded TDP recommendations

**List of Unfunded Needs** to highlight operating, capital/infrastructure, planning, and policy needs for which funding sources have not been identified

---

TDP FINANCIAL PLAN

- Project costs for the full 10-year horizon
  - Develop assumptions
  - Develop & project costs
  - Identify & project revenues
  - Summarize costs & revenues
  - Identify surplus/shortfall
  - Identify unfunded needs
- Be realistic with first 5-years of the plan
- Be realistically visionary with second 5-years
- Provide a clear financial picture with effective summary tables/graphics
TDP FINANCIAL PLAN

TDP Financial Plan Tool

Available on FDOT Transit Office Website

TDP FINANCIAL TOOL

- Excel Spreadsheet Format
- Seven Components
  - Inputs/assumptions
  - Service plan
  - Implementation plan
  - Operating cost element
  - Capital cost element
  - Revenue element
  - Final summary
TDP FINANCIAL PLAN

• Use the Tool or Not?
• Keys to a Better Financial Plan
  • Know the service characteristics
  • Have good revenue data
  • Confirm match requirements
  • Use realistic inflation rates

FUNDING THE 10-YEAR PLAN

• Formula Funding
  • FTA Urban grants such as FTA Section 5307 is the major source and has some flexibility in use for operating. Other formula programs include FTA Section 5311 for rural operations
  • Florida Public Transit Block Grant is completely flexible and allows the recipients to determine annually how they want to use their funding

• Discretionary Funding
  • FTA Section 5339 for transit vehicles and facilities, Better Utilizing Investments to Leverage Development (BUILD), FTA Advanced Transportation and Congestion Management Technologies Deployment (ATCMTD), and FTA and EPA also fund air quality projects and projects involving alternative fuels
  • FDOT grants include Service Development, Transit Corridor, Commuter Services, and Park-and-Ride funds
  • FDOT Resources/Information on Potential Sources
FUNDING THE 10-YEAR PLAN

Leveraging Funds
- **State Toll Revenue Credits:**
  - Federal allowance to use credits to match capital projects
- **Capital Cost of Contracting:**
  - Operations and maintenance expenses that fund contracted services are capitalized and matched at 80/20 instead of 50/50 on the federal side
- Otherwise, attempt to combine all eligible transit services spending to **maximize local matching potential**

Local Funding
- Consider all opportunities to better leverage local funds through formula programs
- Local funding sometimes is more stable in the medium- to long-term
- Also consider other options such as fare/pass changes
- **Public-Private Partnerships**
  - Arrangements that may include subscription services, grants/awards, in-kind support, and even longer-term agreements to support transit services

TDP IMPLEMENTATION PLAN

- Phased schedule of improvements and key details
  - Implementation year, costs, vehicle requirements
- If funded, show potential revenue source(s)
- Include ties to TDP goals and objectives
- Include unfunded needs & indicate why it is important to have a running list of unfunded needs
- Put everyone at ease
  - Make it clear about the opportunity to adjust the plan anytime when priorities shift, funding assumptions change
### TDP IMPLEMENTATION PLAN - EXAMPLE

<table>
<thead>
<tr>
<th>TDP Improvement</th>
<th>Implementation Year</th>
<th>Annual Operating Cost (2018$)</th>
<th>Total Capital Cost (2018$)</th>
<th>Revenue Sources</th>
<th>TDP Goal/ Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain Existing Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintain Existing Fixed-Route Service</td>
<td>2018</td>
<td>$2,591,420</td>
<td>$3,720,000</td>
<td>Existing</td>
<td>1.1</td>
</tr>
<tr>
<td>Maintain Existing Paratransit Service</td>
<td>2018</td>
<td>$531,052</td>
<td>$400,000</td>
<td>Existing</td>
<td>1.2</td>
</tr>
<tr>
<td>Improvements to Existing Routes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Double Frequency on all Existing Routes</td>
<td>Unfunded</td>
<td>$2,608,299</td>
<td>$2,790,000</td>
<td>N/A</td>
<td>3.1</td>
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<tr>
<td>Add Sunday Service on all Existing Routes</td>
<td>2025</td>
<td>$209,611</td>
<td>N/A</td>
<td>Existing</td>
<td>3.3</td>
</tr>
<tr>
<td>New Service Expansion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Fixed-Routes</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Downtown Circulator</td>
<td>2027</td>
<td>$385,463</td>
<td>$465,000</td>
<td>N/A</td>
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<tr>
<td>Regional Express</td>
<td>Unfunded</td>
<td>$308,370</td>
<td>$465,000</td>
<td>FDOT Urban Cor./Local</td>
<td>4.4</td>
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<tr>
<td>Flex Routes</td>
<td></td>
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<td></td>
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<tr>
<td>North Community Flex</td>
<td>2020</td>
<td>$308,370</td>
<td>$80,000</td>
<td>N/A</td>
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<tr>
<td>South County Flex</td>
<td>Unfunded</td>
<td>$616,741</td>
<td>$160,000</td>
<td>N/A</td>
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</tr>
<tr>
<td>Capital/Infrastructure Improvements</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shared Park-and-Rides Lots</td>
<td>2022-2025</td>
<td>N/A</td>
<td>No cost</td>
<td>N/A</td>
<td>6.1</td>
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<tr>
<td>Bus Stop Infrastructure Program</td>
<td>2019-2027</td>
<td>N/A</td>
<td>$50,000</td>
<td>Local Mobility Fee</td>
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<tr>
<td>ADA Improvements Annual Allocation</td>
<td>2019-2027</td>
<td>N/A</td>
<td>$50,000</td>
<td>Existing</td>
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<tr>
<td>Technology Improvements</td>
<td>2018-2027</td>
<td>TBD</td>
<td>TBD</td>
<td>N/A</td>
<td>7.1</td>
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<tr>
<td>Policy/Technology/Other Improvements</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Agency Branding and Marketing Program</td>
<td>2018-2027</td>
<td>$50,000</td>
<td>Private/Public Partnership</td>
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<tr>
<td>Employer Outreach Program</td>
<td>2018-2027</td>
<td>No cost</td>
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<td></td>
</tr>
</tbody>
</table>

### PAINTING THE FUNDING PICTURE

**BCT Connected TDP, Broward County, FL**

- BCT employed the use of colors in bar graphs to clearly depict the total operating costs and revenues for the funded plan, a potential new funding source, and remaining shortfall for the full needs plan, clearly separating the short- and long-term funding needs. BCT developed a similar summary for its capital costs and revenues projections.
PLAN PERFORMANCE COMPARISONS

- Enables comparison of existing network, funded plan, and needs plan, as well as other potential scenarios

PERFORMANCE MONITORING PLAN

- Help ensures that the TDP goals are achieved
  - Aids in tracking implementation progress
  - Aids in tracking progress meeting goals
  - Ultimately makes APRs easier, too!
- Uses data routinely collected by agency
- Focuses on key measures
  - Operating cost per trip
  - Trips per revenue hour
MARKETING PROGRAM

- Expansion of ongoing awareness/marketing efforts
- Continue use of TDP brand
- Use TDP as opportunity to raise profile and support for transit
- Highlight/increase awareness for under-used or newly launched services

ADOPTION & SECURING SUPPORT

- TDP as a catalyst for change
  - Get decision-makers excited about it and they share with constituents during the development and implementation processes
- Must be relevant to the community
- The more involved the decision-makers are, the more they can facilitate the implementation process
- The TDP is developed with defensible tools and analyses
- Decision-makers and public understand, support, and advocate for the TDP
PLAN IMPLEMENTATION & COORDINATION

• Objectives
  • Understand how to navigate local funding and political landscapes
  • Preserve resiliency and adaptability of TDP
  • Integrate TDP recommendations into existing operations and fabric of the community
  • Ensure consistency and coordination with other local plans, efforts, and goals
  • Continue marketing and outreach for TDP implementation plan

PLAN IMPLEMENTATION & COORDINATION

Beyond TDP Adoption

Planning to Implement Recommendations

Plan Coordination

Plan Integration
BEYOND TDP ADOPTION

• Executive Summary
• Continued Marketing/Outreach
• Building on TDP Efforts & Relationships

TDP EXECUTIVE SUMMARY

• Guiding Principles for an Effective Executive Summary
  • Short, no more than 20 pages (12-16 is ideal)
  • Easy to read and understand
  • Easy to reproduce
  • Printed in a booklet format
  • Contains appealing graphics and easy to understand charts
  • Light on written content
  • Highlights and tells the story of “what’s in it for me” for all audiences
A CLOSER LOOK

• Continued Marketing/Outreach
  • Post-TDP outreach is at its core about maintaining the dialogue
  • Agencies should leverage the outreach platform so other planning efforts
  • The TDP has already defended its findings and recommendations; therefore, agencies have a cadre of information and promotional information
  • Can improve the likelihood of full implementation

IMPLEMENTING TDP RECOMMENDATIONS

• Challenges
  • Obstacles in the way of the implementation plan
    • Changing political context
  • Funding
  • Changes in operating environment
    • Demographic or travel flow changes
  • Shifting public support
    • More support for different projects
SOLUTIONS

• Funding “Plan of Action”
  • Outlines steps to take to ensure best chance of securing funding
• Operational Support
  • Work with operations teams to ensure recommended improvements are feasible
• TDP as an Ongoing Tool
  • TDP is a resource for continued investment in the community
• Annual Progress Reports
  • Serve to re-certify and remind community of transit’s value

PLAN COORDINATION & INTEGRATION

• Coordination
  • Comprehensive Operational Analyses
  • Other Plans
    • TAM, Title VI, LRTP, FDOT Work Program
  • Benefits
    • Coordinated aims
    • Cost savings
    • Public outreach

• Integration
  • Informing Other Plans
  • Informing the TDP
OTHER THINGS TO REMEMBER

- TDP Adoption
- FDOT Coordination
  - During TDP planning process
  - After TDP submission to FDOT
- Funding Your TDP
- Beyond Adoption

TDP ADOPTION

- Must be officially adopted by the agency’s governing body
  - County/city boards if transit agency is part of general purpose government
  - Boards of independent agencies or authorities
- Must be submitted to the appropriate FDOT District Office
  - By September 1st of the State fiscal year for which funding is sought
COORDINATION WITH FDOT - POST SUBMISSION

- After You Submit
  - Notification of Compliance
  - Notification of Compliance with Comments
  - Notification of Non-Compliance and Itemization of Deficiencies
  - Re-Reviews
- Review Timeline
- FDOT Feedback
- Major Update Due Dates
COORDINATION WITH FDOT - POST SUBMISSION

FUNDING YOUR TDP

• The following strategies are for small or medium-sized transit agencies in determining how to budget and finance a TDP

  • FTA Funding
    • Planning is an eligible expense (under the capital definition) allowing 80 percent Federal funding to be used
    • Match may come from
      • Toll Revenue Credits (making it actually 100% Federal)
      • State and local funding (making the match 10% state and 10% local)
      • Using all local (making the matching share 20%)

  • Federal Funding
    • Transit agencies may want to annually set aside a portion of Federal funding, effectively building a reserve budget for TDPs
    • This way, the annual impact on the grant funding and budgets will be minimized
FUNDING YOUR TDP

• One-Time Grants
  • Can be used for TDP directly or, better yet, are permitted to be used for general planning efforts, which, in turn, can free-up other recurring or annual funding that can be used for the TDP
    • For example, pursuing FTA Section 5339 capital funding for bus and facilities and then using FTA Section 5307 funding for the TDP

• Partnering to Access the Following Resources
  • MPO’s FTA Section 5305 funding
  • Private foundations, local municipalities, economic development agencies, and other local organizations

• Breaking it Up
  • Agencies can complete certain components of the TDP in-house while hiring a consultant to complete other components

BEYOND ADOPTION

• In addition to the TDP’s primary role as a blueprint...
  • TDPs should continue to serve as marketing tool
  • TDPs should be revisited and updated to remain a “living document”
  • TDPs should continue to embrace evolving community transit needs
  • TDPs should promote awareness of transit services
  • TDPs should engender support for transit
CHAPTER 4 - ANNUAL PROGRESS REPORT

TDP ANNUAL PROGRESS REPORT

• TDP annual update should be an Annual Progress Report that
  • Provides a check-in on the TDP progress made
  • Identifies where progress is not occurring
  • Facilitates updates to the goals & objectives
  • Prompts updates to the implementation & finance plans
  • Enables re-evaluations to account for large changes in needs
  • Ensures that the TDP recommendations are reviewed periodically
**TDP RULE ON APR**

(4) Annual Update. Annual updates shall be in the form of a progress report on the ten-year implementation program, and shall include:

(a) Past year’s accomplishments compared to the original implementation program;
(b) Analysis of any discrepancies between the plan and its implementation for the past year and steps that will be taken to attain original goals and objectives;
(c) Any revisions to the implementation program for the coming year;
(d) Revised implementation program for the tenth year;
(e) Added recommendations for the new tenth year of the updated plan;
(f) A revised financial plan; and,
(g) A revised list of projects or services needed to meet the goals and objectives, including projects for which funding may not have been identified.

• Translation: A report on the prior year’s accomplishments and discrepancies from the plan, revisions needed to the plan, and the addition of a new tenth year to the plan

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**APR BASICS**

<table>
<thead>
<tr>
<th>What an APR is...</th>
<th>What APR is Not...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual report on implementation progress</td>
<td>Minor update to the TDP</td>
</tr>
<tr>
<td>Data resource for FDOT reporting</td>
<td>Same format as TDP, just shorter</td>
</tr>
<tr>
<td>Update of three key TDP elements</td>
<td>Update of all TDP elements</td>
</tr>
<tr>
<td>Update to add new tenth year information</td>
<td></td>
</tr>
<tr>
<td>Self-completed progress report</td>
<td></td>
</tr>
<tr>
<td>Self-completed report on needed changes</td>
<td></td>
</tr>
<tr>
<td>Tool to make TDP an active strategic plan</td>
<td></td>
</tr>
<tr>
<td>Tool to keep TDP in front of Board and public</td>
<td></td>
</tr>
<tr>
<td>Chance to “blow your horn”</td>
<td></td>
</tr>
<tr>
<td>Opportunity to make the case for help</td>
<td></td>
</tr>
<tr>
<td>Way to help keep TDP needs and goals “fresh”</td>
<td></td>
</tr>
<tr>
<td>Requirement for Public Transit Block Grant</td>
<td></td>
</tr>
</tbody>
</table>
APR CHECKLIST

1. Identify how the implementation plan for the prior year was or was not achieved, and provide explanations when not
   - Include a table that shows the status of each item in the implementation plan for the prior year

2. Take a closer look at any failures to meet the implementation plan to identify lessons learned and how the agency can stay the course to achieving its GOPs
   - Include a table of all the GOPs and how they were supported by progress from the past year, or how they were not supported but will be in subsequent years

APR CHECKLIST

3. Identify changes required to the implementation plan for the upcoming year
   - Include an updated implementation plan table for the upcoming year

4. Determine how changes to the upcoming year and emergent requirements impact the implementation plan through the 10th year of the prior Major Update or APR
APR CHECKLIST

- Decide if there will be any projects undertaken in the new 10th year of the plan (i.e., brand new, continuing, delayed)
  - Add a new 10th year, beyond the prior plan, and include implementation year and details

- Update the financial plan based on modifications to the implementation plan and any other assumptions
  - Update the “Cost & Revenue Summary” report as described in Section 3.8 of the Handbook

- Create a revised projects list that will be required to meet the GOPs (i.e., new implementation plan items as well as unfunded ones)
  - Indicate how any new projects support the GOPs, and/or how unfunded ones are needed

BENEFITS OF APRs

- **Renewed Awareness**
  - An opportunity to refresh stakeholders of the agency’s goals
  - Remind community of implementation plan

- **Provide Status Report/Feedback**
  - Listing accomplishments/shortfalls allows for feedback
  - Showcasing of successes allows for new public involvement avenues

- **Public Involvement**
  - No requirements for engaging the public
  - No FDOT-approved PIP required, but can be part of post-adoption outreach

- **Expanded Planning Horizon**
  - New 10th year in plan
  - Ensures “living” nature of TDP as it incorporates new needs