Transit Planning for All
MOD Grant Kick-Off

Monthly Progress Reporting and
Pathway to Inclusion
October 2, 2020

Part 1: Using Data - Monthly Reports

Use of Data and Results

- Grantees should use data to track activities and results to keep yourselves informed on progress towards inclusion and MOD goals.
- Be clear how data will be used by projects, stakeholders, the community, and organizational sponsors.

Progress Report: Purpose

• Progress reports, and any data you collect, should have 4 purposes:

1. Program monitoring and improvement
2. Support decision-making
3. Accountability (for stakeholders and external)
4. As a learning tool (for all of Transit Planning for All)

Progress Report Process

- The Progress Report: Submitted monthly, due by the 15th of the next month
- First report due November 16 for October
- Due date is the next business day if the 15th is on a weekend/holiday
- Be brief but thorough in your reporting
- Reports to be submitted monthly in Survey Monkey Apply
- Detailed instructions to follow

Progress Report: Helpful Hints

- You should have a copy of the template and template with instructions in Word from your liaison
- One person who really knows the project (goals, activities, etc.) should complete report
- Report filed in Survey Monkey Apply
- You can complete report in Word, then cut and paste into Survey Monkey Apply
- Most report content will change monthly
- Contact your liaison or David B if you have questions

General Information

Project Title: *Provide a title for the MOD project work*	
Grant Lead Agency: *NAIPTA, ARC, or SDOT*	**Reporting for Month of:** *This month*
Person Responsible for Report: *Content Person*	**Grant Period:** 09/01/2020–05/31/2021
Contact Information: *Email for the person who provided the report content*	

- Project title can be from grant application or new.
- The grant period will not change.
- Contact person should be someone who knows the content of the report, and include their contact information.

Overall Pathway Score

Overall Pathway to Inclusion Goal for Project: Level: *End of project goal from your proposal*	
Pathway Level Last Quarter: *# for last 3 months*	**Estimated Pathway Level Next Quarter: #** *estimate for next 3 months*

- For Overall Pathway to Inclusion Goal, enter a single level from your grant proposal. Round up or down if in-between.
- For **Pathway Level Last Quarter**, enter the "current level" from Criterion 4 of your grant proposal.
- For "Next Quarter," enter your best estimate of the Overall Pathway Level for the next 3 months, based on planned activities.
- More on Overall Pathway Score later in session.

Progress Towards MOD

1A. Project Progress Towards MOD Objectives During Month
• Provide bulleted summaries of this month's project activities and outcomes that <u>lead to achievement of Mobility on Design Objectives</u>.   • Focus on general status of Mobility on Demand development.   • Over the 18 months of the project, we should be able to read 1A and follow the progress that describes your project's development of MOD.

Progress Towards Inclusion

1B. Project Progress Towards Inclusion Objectives During Month
- Provide bulleted summaries of this month's project activities and outcomes that lead to <u>achievement of Inclusion Objectives</u>.   - Report on efforts to identify, engage, maintain interest of, and sustain inclusion of participants (people with disabilities and older adults).   - Include activities of partners specifically related to inclusion.   - Over the 18 months of the project, we should be able to read 1B and follow the progress that describes your project's inclusion of people with disabilities and older adults.   - There should be a progression around and up the Pathway to Inclusion towards your Overall Pathway to Inclusion Goal.

Outreach and Engagement

2. Outreach and Engagement Activities to Achieve MOD
- Provide bulleted summaries of activities specifically focused on outreach and engagement to achieve MOD.   - Project are expected to use a human-centered design approach to develop MOD. This will go beyond outreach and engagement of people with disabilities and older adults serving on your steering committee.   - Planning for and conduct of these activities, including partnership activities contributing to outreach and engagement should be described here.

Participant Activities

3. Participant Activities This Month (specific examples of inclusion)
• Provide specific examples of active and meaningful participant activities. • Examples go beyond identifying numbers serving on steering committees, which are reported in Section 9. • Activity descriptions must be specific enough that Pathway level for the activity can be identified. Include the Pathway level with the description of the activity. • Report both lower and higher Pathway level activities. • Providing information to participants (Level 2) and collecting participant feedback (Level 3) are essential activities without which project is not inclusive. • Involving participants in data collections, other program activities is Level 4. • Participant involvement in decision making (Level 5) and leadership of project activities (Level 6) can and should occur at any stage of your project. • Increasing participant capacity to serve at higher Pathway levels is the key to increasing inclusion.

Partner Activities

4. Partner Activities This Month (identify partner organization and contributions)
- Active and meaningful involvement of organizational partners and representatives contributes to, continues after the project.   - Provide brief, bulleted descriptions of contributions and activities of your project's organizational partners.   - Examples in this section must go beyond identifying how many partners are on your steering committee, although you can report that too, especially gains and loses.   - What are your organizational partners contributing to the project? How do partner activities contribute to achievement of your project goals? Are partners involving people with disabilities and older adults in their support to the project?   - The content of this section changes every month. If there are no partner contributions in a month, report that.

Staff/Contractor Activities

5. Project Staff/Contractors Activities This Month
• Use this section to provide examples of staff and contractor contributions to the project. • This need not be an exhaustive list. • Feature the highlights. Provide a general idea of what project staff and contractors worked on this month. • These may change at different stages of the project, and as participants become more actively, meaningfully, and inclusively involved in project activities.

Issues/Challenges

6.　　Issues/Challenges This Month
• Transit Planning for All grants are "demonstrations." ● Grantees experience successes and challenges. Use this section to document the latter. ● Your experience will help Transit Planning for All learn from the issues and challenges you face. ● Documenting issues and challenges will allow your liaison and the Transit Planning for All project team to stay informed and help identify potential solutions. • If you have found solutions that could be useful to other communities, please flag those.

Sustainability

7. Sustainability Activities This Month
• At 18 months, your grants are as long or longer than earlier rounds.
• Even with more funding than usual, and more time to conduct inclusive activities, it is not too early to think about how your project can be sustained when grant funding ends.
• Use this section to provide bulleted examples of activities focused on the long-term sustainability of your project.
• Examples include outreach to, and support from government agencies, long-term planning activities, exploring regional and local funding and partnerships, and other activities that will help your project continue to succeed after grant funding ends.
• If no sustainable activities to report, please say so.

Project Plans/Inclusion Plans

8. Project Plans for Next Month; Every Quarter, Add Inclusion Plans for the Next Quarter
- Every month, use bulleted summaries to describe project plans for the next month.   - How will people with disabilities and older adults be involved during the next month?   - How will partners be involved in the next month?   - The focus here is on the overall project.   - At least once every 3 months, discuss strategies for increasing active and meaningful involvement of participants.   - Provide a bullet point or two every 3 months to describe your plans for inclusion in the following 3 months.

Inclusive Performance Measures: Outputs

9. INCLUSIVE PERFORMANCE MEASURES (Section 9 is ONLY 1 page)				
Outputs	**Column 1** **Target for End of Implementation Phase**	**Column 2** **Column 4 Total from Prior Month Report**	**Column 3** **# This Month**	**Column 4** **Total at the End of This Month (2+3=4)**
9A1. **#** of unduplicated participants on steering committees (report the increase or decrease in column 3; if no change, report 0 in Column 3)	End of project target	What did you report last month?	Reporting for this month	= Last month + this month
9A2. Total **#** of participants who attended meetings (duplicates OK)				
9A3. **#** of inclusion/participation needs/barriers/problems **identified by participants**				
9A4. **#** of inclusion/participation solutions **identified by participants**				

Inclusive Performance Measures: Outcomes

9. INCLUSIVE PERFORMANCE MEASURES (Section 9 is ONLY 1 page)				
Outcomes	**Column 1** **Target for End of Implementation Phase**	**Column 2** **Column 4 Total from Prior Month Report**	**Column 3** **# This Month**	**Column 4** **Total at the End of This Month (2+3=4)**
9B1. # of additional or new participants engaged in planning process (either duplicated or unduplicated, but be consistent in how you track)	End of project target	What did you report last month?	Reporting for this month	= Last month + this month
9B2. # of inclusion/participation barriers/problems vetted/referred to responsible parties				
9B3. # of inclusion/participation solutions implemented (partially or fully)				

Inclusive PMs: Satisfaction Measures

9. INCLUSIVE PERFORMANCE MEASURES (Section 9 is ONLY 1 page)				
Satisfaction Measures	**Column 1** **Target for End of Implementation Phase**	**Column 2** **Column 4 Total from Prior Month Report**	**Column 3** **Monthly Average % or Total %**	**Column 4 Total End of This Month (Average % or Total % to Date)**
9C1. **%** of participants satisfied with the planning process	End of project target	Reported last month	Reporting for this month	Overall average or total
9C2**. %** of stakeholders/partners satisfied with the planning process				
9C3. **%** of participants who felt their opinions had an impact on planning, activities				

- Sample satisfaction data collection form that you can customize will be provided.
- <u>Good Enough</u>: If you have more than one data collection in the month, you can average the results in Column 3.
- <u>Better</u>: A more accurate way to calculate is to add together the total number satisfied from each data collection, and divide that number into the total number surveyed.

Inclusive PMs: Explain Project PMs

Explain this month's PMs (required)

- At the beginning of the project, set a target for each required inclusion output, outcome, and satisfaction PM.
- This target is for the full 18 months, after both planning (Months 1-9) and implementation (Months 10-18).
- Each month, use Column 2 to indicate results from last monthly report. For October 2020, leave blank.
- In Column 3, report results for this month.
- In Column 4, add Column 2 to Column 3.
- For satisfaction measures: average multiple data collections (good enough) or better, track total numbers satisfied from all data collections, total numbers from whom data are collected, and divide the # satisfied into the total data collected to get an accurate percentage.

# Inclusive PMs: Types of Data Reported

Explain this month's PMs (required)

- Use the text box under each performance measurement section to explain the results for the month.
- The explanation is especially useful to describe changes that occurred during the month.
- Results should be explained each month. If the results do not change, please explain why. For example, if there are no meetings held you won't have any new satisfaction data.
- If the results are explained elsewhere in the Monthly Progress Report, provide the section #.

MOD Performance Measures (Sec. 10)

- DJB Evaluation and your project liaison will meet with you to help identify project-specific MOD performance measures.
- The national project team may also identify MOD measures that would be relevant to all grantees.
- Reporting for MOD-specific measures will start 1 month after the discussion with DJB Evaluation and the liaison.
- Calculations and reporting will be consistent with Section 9, Inclusion Measures.
- Do not repeat inclusion measures in this section. Instead, focus on your MOD project objectives.

Part 2: Pathway to Inclusion
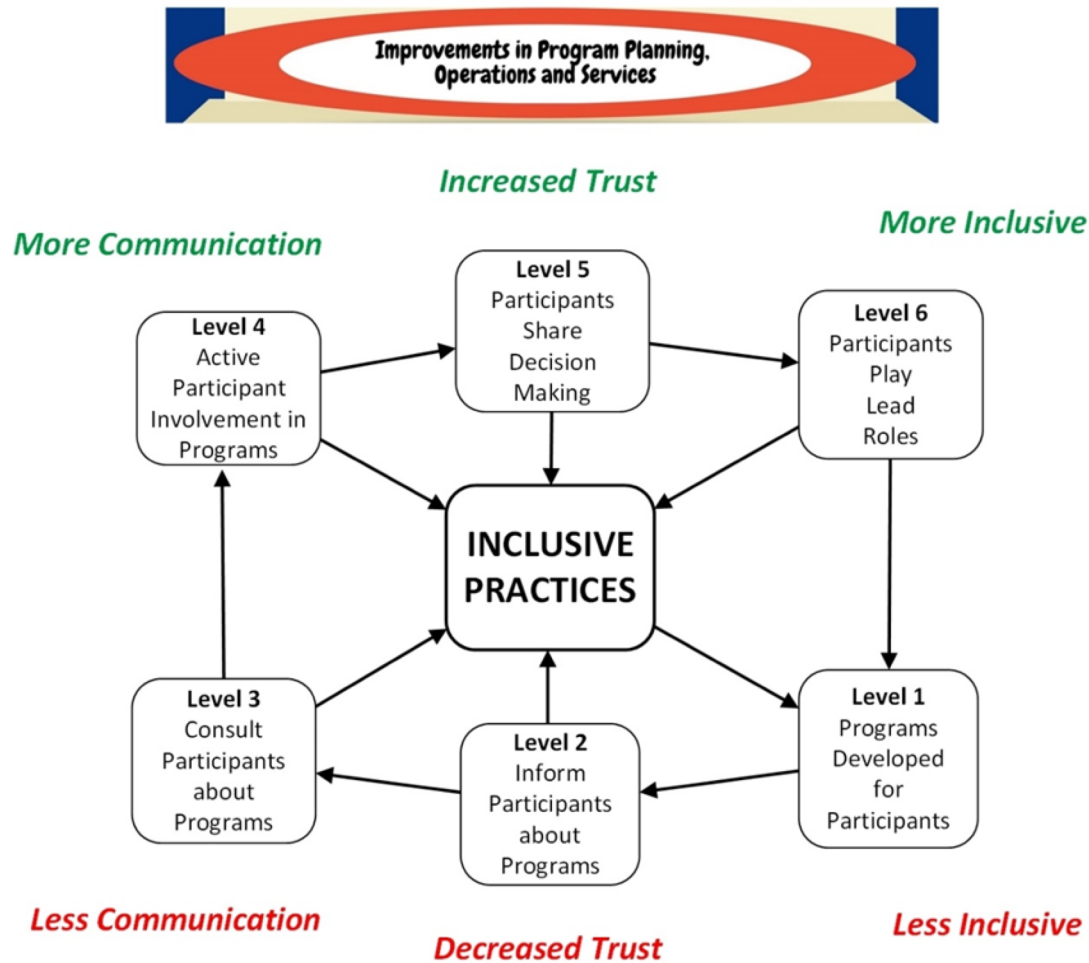
Pathway Level 1

- Programs Developed for Participants
- Little or no involvement of participants
- Few programs are at Level 1
- Level 1 is a context
- It is unlikely that any program will succeed without some participant inclusion

Pathway Level 2

- Inform Participants About Programs
- Programs provide information to current and potential participants.
- Communication is generally one-way (from program to participants)
- Purpose: Communicate to stakeholders.
- Examples: Brochures, websites, emails, social media, community presentations by program staff or consultants

Pathway Level 3

- Consult Participants about Programs
- Programs engage in individual or group discussions or data collections with people with disabilities and older adults
- Purpose: Collect feedback from participants about current services, unmet needs, and potential services
- Examples: Surveys, focus groups, community meetings

Pathway Level 4

- Active Participant Involvement in Programs.
- Participants, through steering committees or other activities, play active, meaningful roles in planning and program activities that serve people with disabilities and older adults
- <u>Purpose</u>: Build credibility; expand resources
- <u>Examples</u>: Participants led person-centered activities; participants review program materials

Pathway Level 5

- Participants Share Decision Making
- Participants share in the process of making decisions regarding planning and operations of programs.
- <u>Purpose</u>: Decision-making expands influence ("Nothing about us without us.")
- <u>Examples</u>: Participants consider program and policy alternatives, share influence in decision-making.

Pathway Level 6

- Participants Play Lead Roles
- Individual participants (not representing partner organizations) take on leadership roles in program planning and operations
- Purpose: Programs for people with disabilities and older adults led by participants
- Examples: Participants assume responsibility for planning and carrying out project tasks

Lower vs Higher Pathway Levels

- Lower levels (Levels 1-3) have less communication, decreased trust: less inclusive
- Higher levels (Levels 4-6) have more communication, increased trust: more inclusive.
- Pathway is a continuum from lower levels to higher levels.
- At any given period of time, activities at different levels may be happening
- The Pathway is not one way. The Pathway is continuous.

Overall Pathway Level: Score

- Projects track staff, partner, and participant activities over 3 months.
- Project staff and partners carrying out most/all activities? Project is at Level 3 or below.
- Participants actively/meaningfully involved in planning/operations, shared decision making, or played lead roles? Project is at Level 4 and up.
- Inclusive review of project activities.
- Inclusively decide if enough project activities are Level 4 to 6 to rate Overall Pathway Score 4+

Overall Pathway Level: 5 Steps

1. **TRACK** *Inclusive Activities* Every Month: Include examples on Project Monthly Reports.

2. **REVIEW** *Inclusive Activities*: Review *Inclusive Activities* in last 3 monthly reports. Invite the Project Liaison and Project Evaluator to be part of these discussions.

3. **SCORE** the *Overall Pathway Level*: Use an inclusive process to discuss the *Overall Pathway Level* for your project during the prior 3 months. Inclusively decide the Overall Pathway Level. **Round the *Overall Pathway Level* up or down to the nearest full level**.

Overall Pathway Level: 5 Steps

4. <u>PLAN</u> <u>for the Next Three Months</u>: Inclusion requires good planning.

- What's the project plan for the next three months? What role will *participants* will play during those three months.
- How will your project boost or enhance inclusion?

5. <u>REPORT</u>: Include the *Overall Pathway Level* for the last quarter and the Estimated *Overall Pathway Level* for the next quarter on the Monthly Progress Report covering:

- December 2020
- March, June, September, December 2021
- March, May 2022 (final project Overall Pathway Level