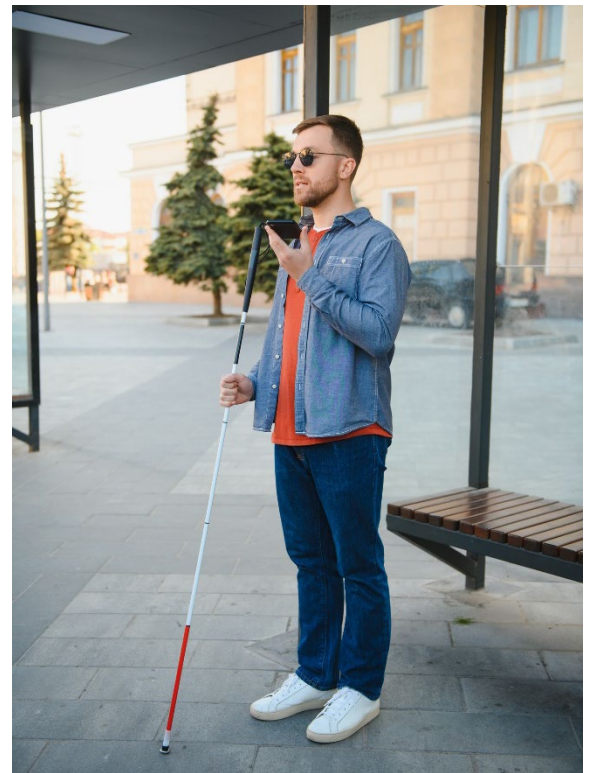# LESSONS LEARNED IN INCLUSIVE TRANSIT PLANNING

with Persons with Disabilities, Older Adults, and Priority Populations

JUNE 2023

About CTAA

Community Transportation Association of America (CTAA) is a national nonprofit organization whose staff, board, and state/tribal delegates are dedicated to ensuring that all Americans, regardless of age, ability, geography, or income, have access to safe, affordable, and reliable transportation. CTAA and its members believe that mobility is a basic human right. CTAA manages Transit Planning for All (TP4A), a transit planning project and technical assistance center that seeks to explore and promote the practice of inclusive transit planning.

About Transit Planning 4 All

Transit Planning 4 All (TP4A) supports communities nationwide in adopting proven, sustainable, and replicable models that include participation of people with disabilities and older adults in the design and implementation of coordinated transportation systems that are responsive to their needs. Our mission is to increase inclusion in transportation planning and services for people with disabilities and older adults. TP4A is administered by CTAA in partnership with the University of Massachusetts Boston's Institute for Community Inclusion, USAging, and DJB Evaluation Consulting. TP4A launched through funding from the U.S. Department of Health and Human Services' Administration for Community Living.

About the Authors

CTAA contracted AMMA Transit Planning, Inc., to conduct this research project. The primary author is Valerie Mackintosh, with oversight and assistance provided by Selena Barlow of Transit Marketing and Heather Menninger of AMMA Transit Planning, Inc.

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EXECUTIVE SUMMARY

The Community Transportation Association of America (CTAA) and the Transit Planning 4 All (TP4A) partners undertook this research effort to better understand the landscape of inclusive transit planning for people with disabilities and older adults by agencies and organizations beyond their oversight. After funding and assessing over 40 projects through their TP4A project, CTAA wished to understand challenges to and best practices for inclusive planning that other agencies have identified and to develop a White Paper to support and enhance those efforts.

TP4A defines inclusive planning as "a process in which stakeholders, including participants (people with disabilities and older adults), partner organizations, and coordinated transportation partners are actively and meaningfully involved in transportation planning. They and other practitioners have found that an inclusive process, where participants can affect the outcome, results in better programs, greater communication, increased trust, and better outcomes for all.

This White Paper synthesizes findings from a research effort that included a thorough literature search and review and interviews with selected practitioners and experts. We identified and documented in detail six principles for inclusive planning with people with disabilities, older adults, and other priority populations. These include:

1. Be intentional and transparent about your goals for inclusion.
2. Get to know the community.
3. Establish early and ongoing collaboration with key stakeholders that continues throughout every stage of the process.
4. Use targeted community-specific strategies.
5. Provide payment and incentives for participation.
6. Evaluate outcomes.

For each principle, this paper details purposes, barriers addressed, specific strategies and techniques to implement the principle, and provides specific examples or case studies from transit agencies and planning organizations to aid others in operationalizing inclusive planning.

This White Paper aims to guide agencies and organizations intending to launch or deepen their inclusive practices. Inclusive planning is difficult and time-consuming work, but its value is measurable.

LESSONS LEARNED IN INCLUSIVE TRANSIT PLANNING
with Persons with Disabilities, Older Adults, and Priority Populations

INTRODUCTION

Why This Study?

The Community Transportation Association of America (CTAA) and its Transit Planning 4 All (TP4A) partners undertook this research effort to better understand the landscape of inclusive transit planning by agencies and organizations outside of their oversight. Over the past 10 years, CTAA's TP4A project has funded more than 40 community projects that have supported active engagement of persons with disabilities and older adults in transit planning. After conducting lessons-learned analyses of the projects they've funded, CTAA/TP4A wished to understand challenges to inclusion and best practices that others in the industry have encountered. The goal of this effort is to develop a White Paper of findings to support organizations and agencies as they work to enhance their inclusive planning processes, both internally and externally, for people with disabilities, older adults, and others.

This paper documents findings from a literature review and selected interviews about how the transit industry is implementing inclusive planning practices. It aims to provide a tool to support agencies and organizations as they work toward greater inclusion in their planning process, transit operations, and within their organizations to expand the reach of both planning initiatives and resultant services.

Inclusive Planning Leads to Better Outcomes for All

Inclusion means fair participation for all. TP4A defines inclusive planning as "a process in which stakeholders, including participants (people with disabilities and older adults), partner organizations, and coordinated transportation partners are actively and

meaningfully involved in transportation planning." An inclusive process, where participants affect the outcome, results in:

- Implementing projects that better represent and respond to the needs of participants.
- Empowering participants to take ownership of and become advocates of the project.
- Building knowledge, communication, and advocacy skills of participants.
- Building trust between the organization and participants.
- Creating better transit programs.

"Nothing about us without us" is a rallying cry from disability activists first invoked in South Africa in the 1990s. It gets to the heart of inclusive transit planning: transit programs cannot serve people well or meet their needs if they are excluded from their development.

Pathway to Inclusion

TP4A has developed, tested, and demonstrated ways to empower people with disabilities and older adults to be actively and meaningfully involved in contributing to the planning and operation of coordinated transit systems. Through their projects and research, TP4A has developed the **Inclusive Planning Guide**[1] and the Pathway to Inclusion (Pathway) The Pathway if presented in Figure 1 and is available at **https://transitplanning4all.org/resources/pathway-to-inclusion/.**

The Pathway presents a way to think about inclusion. This graphical tool can be used to distinguish between types of active and meaningfully inclusive activities and determine a project's overall placement on the Pathway's continuum. Planning efforts should include activities at all levels. While Levels 4–6 are aspirational, agencies will need to utilize strategies at lower levels as building blocks to attain greater inclusion and to and to ensure that people with disabilities are informed and consulted about transit programs that they use. Inclusive programs utilize inclusive activities at all levels, depending on project/program needs.

PATHWAY TO INCLUSION
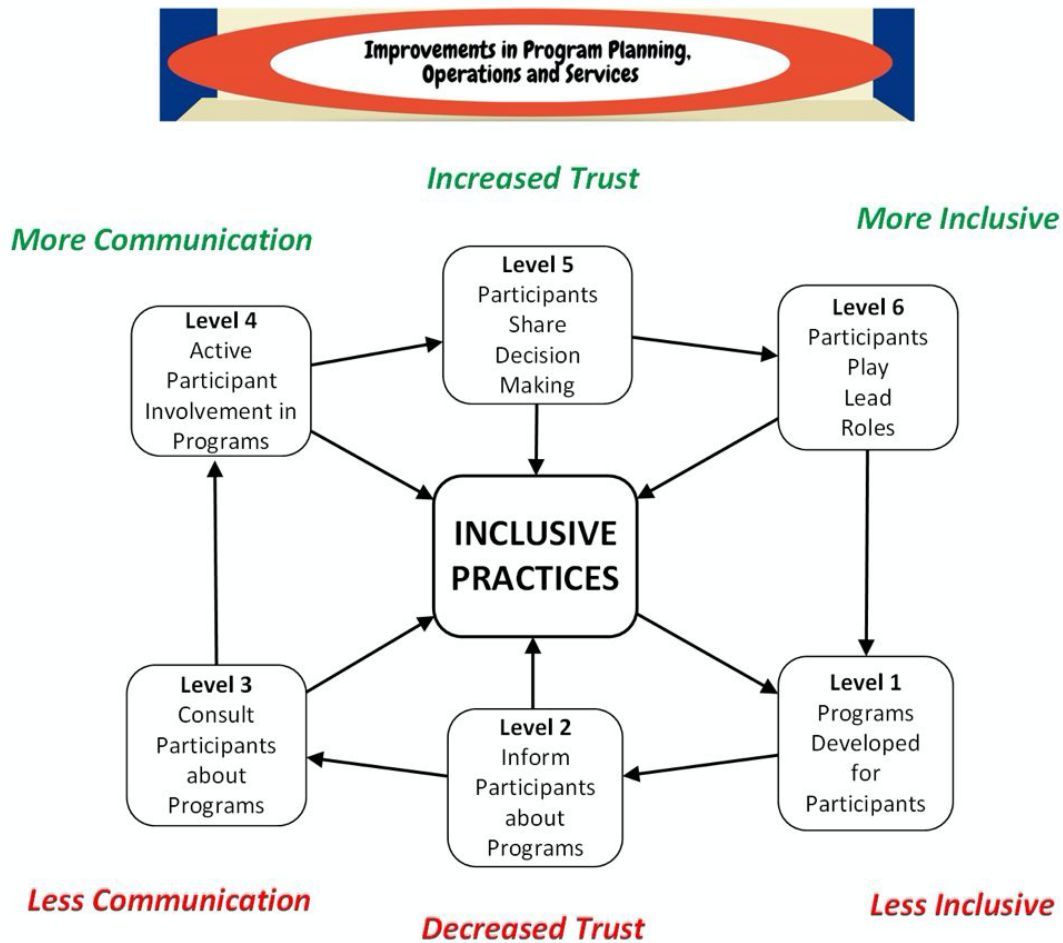
Figure 1, The Pathway to Inclusion developed by Transit Planning 4 All demonstrates how inclusive practices centering on more communication and increased trust lead to higher levels of inclusion.

Best practices presented in the following pages are the inclusive practices at the center of the Pathway continuum, which include the specific strategies and techniques recommended to achieve more communication, trust, and inclusion.

Best Practices Informed by the Overlap of Inclusion and Equity Work

Inclusion cannot be discussed without talking about equity, as these goals overlap. Equity is the just and fair distribution of resources and impacts. Inclusion means creating an environment where all community members feel invited to participate and confident that they can affect outcomes.

The 2020 murder of George Floyd and the Black Lives Matter protests prompted the transit industry to reckon with its past of underserving, dividing, and excluding communities of color. Many agencies and organizations have adopted an equity lens to their planning process, while many were doing so prior to 2020. This often includes asking themselves who they have not included in the decision-making process, which communities are being underserved, and how to mitigate — and prevent — such exclusion. Some agencies are also thinking about these topics within their organizations and have adopted Diversity, Equity, and Inclusion (DEI) programs and practices into internal processes as well.

This White Paper brings examples and tested lessons learned from agencies and organizations working toward inclusion and equity. Whether these efforts are framed as equity, DEI, or inclusion, the principles and strategies presented here represent a glimpse of what are current best practices to increase the numbers and types of voices that are included in transit planning and decision-making.

APPROACH

This White Paper is not intended to be an exhaustive list of needs, barriers, and engagement techniques, but a synthesis on findings of current best practices in inclusive transit planning practices for people with disabilities, older adults, and other historically underserved and marginalized populations (priority populations). While it does offer comments on needs and barriers to service or inclusion for these populations, it is far from complete. Comprehensive sources are listed in the **Additional Resources** section and numerous references are cited.

Methodology

The first phase of this effort was a literature search and review of reports, white papers, webinars, and presentations published over the last 10 years. Publications were deemed applicable when they met two or more of the following criteria:

- Focused on inclusive transit planning and operations.
- Focused on or included people with disabilities and older adults or historically underserved and marginalized communities.
- Focused on meaningful engagement with an equity lens.

The second phase of this effort was a series of interviews with a selection of practitioners and experts in their field and agency representatives of case studies and examples that were identified during the literature review and available for an interview during this research effort. The individuals interviewed — some recommended by CTAA's project advisors — represent an array of agency types across the country: transit agencies, Metropolitan Planning Organizations (MPOs), disability advocates, transit planners specializing in engagement across small urban and rural communities, and agencies focused on older adults and tribal communities. We asked these experts to share details about their experiences and programs, provide insight into their own lessons learned, and make recommendations for additional study.

The findings of these efforts are documented in this report.

How to Read This Paper

This White Paper is organized to identify and describe **Principles for Inclusive Transit Planning.** For each of the six principles, we provided a description, common barriers that this principle addresses, and strategies and specific techniques to implement the principle. We included detailed examples (in boxes with a blue outline) and case studies

(in gray boxes) from transit agencies and planning organizations. This list is not exhaustive of every inclusive practice available, but it does represent recommended strategies identified in the literature review that were reaffirmed through conversations with practitioners. We also provided several tools to support your inclusive practices: a graphical tool that may guide your agency in implementing the Pathway to Inclusion, an excel-based tool to begin building a stakeholder database, and checklist tools to consult when planning engagement activities.

These Best Practices Pertain to Many Intersecting Identities

While TP4A is foundationally focused on older adults and people with disabilities, we understand that identities intersect (Figure 2). A person with a disability may also be a person of color or may not speak English. This White Paper recognizes that increasing inclusion for people with disabilities and older adults will increase inclusion for all.

This document centers priority populations. While the priority populations, or communities of concern, may differ for each agency or organization based on your community's unique makeup, we mean the often transit-reliant, historically underserved and marginalized communities. These include older adults and persons with disabilities; immigrants and Limited English Proficient (LEP) individuals; Black, indigenous, and people of color (BIPOC); and people with low and no incomes, among others.

This paper identifies when a barrier to engagement or access or an inclusive strategy has been found to be relevant to a particular community.
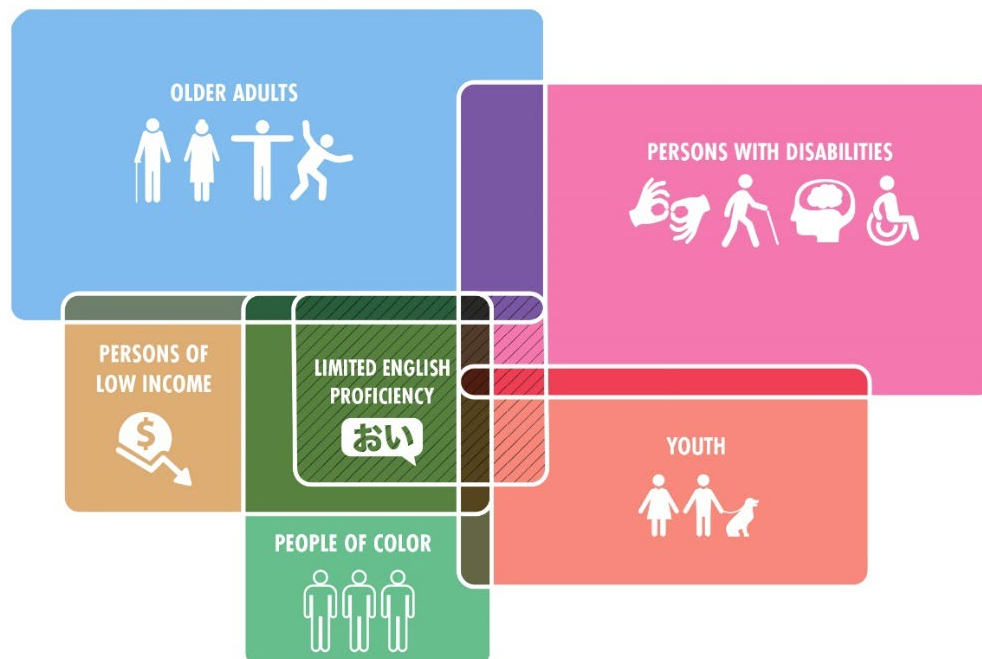
Figure 2, Because of the intersecting nature of our identities, focusing inclusion efforts on several priority populations — like people with disabilities and older adults — we can increase inclusion for all communities.

RESEARCH FINDINGS

These six **Principles for Inclusive Transit Planning** and accompanying best practices of this White Paper encompass the overarching themes identified in the literature review and reaffirmed through interviews with experts. For each thematic principle, we have provided best practice strategies and recommended techniques, as well as case studies and examples. These inclusive practices provide concrete activities by which to implement the goals of the TP4A Pathway to Inclusion.

PRINCIPLES FOR INCLUSIVE TRANSIT PLANNING

with Older Adults, Persons with Disabilities, and Priority Populations

1. **Be intentional and transparent about your goals for inclusion.**

2. **Get to know the community.**

3. **Establish early and ongoing collaboration with key stakeholders that continues throughout every stage of the process.**

4. **Use targeted community-specific strategies.**

5. **Provide payment or incentives for participation.**

6. **Evaluate outcomes.**

1. BE INTENTIONAL AND TRANSPARENT ABOUT YOUR GOALS FOR INCLUSION.

Inclusive planning does not happen by accident. It requires intention and focus. Agencies that prioritize inclusion or equity recommend that their peers do so deliberately and genuinely.

Purposes

- Reinforce that inclusion is a priority for your agency by formalizing it.
- Begin to heal old wounds by acknowledging existing barriers.
- Build trust with your community.

Addressing Barriers

Inclusivity is often not a priority for agencies, despite the best of intentions. This can stem from conflicting priorities, limited budgets, insufficient staff time, and time constraints. This lack of intentionality perpetuates vulnerable populations continuing to be underrepresented and feeling shortchanged. In their _Transportation Access for Everyone: Washington State_ White Paper, Disability Mobility Initiative reported that "almost everyone we interviewed expressed a sense that their mobility needs are afterthoughts and that they are substantially left out of the processes that shape transportation systems."[2] This sentiment was repeated throughout the literature as a real barrier to participation for disadvantaged populations.

Lack of trust is a significant barrier to getting people to participate in the decision-making process. People with disabilities report lack of trust due to the perception of being treated as second-class citizens. Other communities, such as indigenous people, people of color, and immigrants, may be suspicious of government organizations due to historic treatment. Inclusion policies are an approach to being transparent and honest about acknowledging history, existing barriers, and old wounds. This can help strengthen inclusive planning efforts and build trust with your community.

Planners often do not reflect their communities. Increased inclusion within your agency is one way to ensure people with diverse perspectives and experiences have a seat at the decision-making table. Diversity, Equity, and Inclusion (DEI) programs have been embraced by more agencies as they seek to create workplaces that look like the communities they serve. A good place to start is the National Rural Transit Assistance Program's (RTAP) "Best Practices Spotlight Article on Diversity, Equity, and Inclusion in Public

Transportation".[3] This article provides tips on getting started on an inclusion program within your agency and several case studies of transit agencies and RTPAs that are increasing diversity, equity, and inclusion within their organizations and transportation services.

Best Practices

Make inclusivity a true priority.

When discussing inclusivity practices and successful programs, practitioners use and the literature cites the words *authentic, sincere, intentional, active, deliberate, genuine,* and *thoughtful.* They mean inclusion must be done on purpose and with care. The following best practices provide techniques to begin prioritizing and implementing inclusion.

Be honest about what you can and can't do.

Inclusive planning is time-consuming and labor-intensive and existing budgets don't often reflect meaningful engagement as a priority. Be realistic about what your agency can reasonably accomplish in a specific timeframe. Some practitioners have cautioned that they lost trust with their communities by not reaching inclusion goals or by not being able to implement community input due to funding. They advise others to be open about what you can't do, about budget limitations, and to set reasonable expectations.

Conduct research and inclusive outreach to learn where your agency needs to make improvements.

Meaningful and inclusive engagement should be an integral component of any planning process or service change. This engagement should also guide the development of your agency's participation plan and inclusion policies.

- Identify the priority populations or communities of concern in your service area. What challenges do they encounter to accessing your services and participating? See **Principle 2**.
- Who are you not hearing from when you do public engagement? Why?
- How do different communities want to be engaged?
- Best practices on inclusive engagement to priority populations are provided in **Principle 4**.

<u>Develop an inclusion statement, agency-wide policies or goals, or an implementation plan to operationalize inclusion across your agency</u>.

In their national review of 35 Metropolitan Planning Organizations (MPOs)[4] for equitable project prioritization practices, the Center for Transportation Equity, Decisions, and Dollars found that agencies with "a vision and explicit goal are more likely to ensure that the planning process addresses the needs of disadvantaged populations." Developing policy requires your agency to reflect on priorities and develop a plan for implementation.

Additionally, policy is one way to ensure an impact across your entire agency — through all services, programs, and planning processes.

- Use an inclusive engagement process to inform your agency's policies.
- Examples of visions and goals from the Minnesota Department of Transportation (MnDOT) and King County Metro of Seattle, Washington, are provided on the following pages.

This also could include developing projects like an equity framework that must be completed for any policy change or project, equity assessment tools, and mapping equity-focused communities.

- Los Angeles Metro has developed several equity assessment tools. View these and more about their equity platform at their "**Equity Information Hub.**"[5]

<u>Continue to listen and learn from people with lived experience.</u>

Approach engagement opportunities with an open mind and patience. Transit riders often know our systems better than we do. People with disabilities tend to know their community's streets and sidewalks and connections better than planners. We should respect this lived experience and learn from it — about transit and how to do inclusion better.

- Have an open mind and flexible agenda. Be prepared to listen and learn.
- Enhance staff training on cultural competency skills, sensitivity training, and the importance of inclusion. Include staff who are not usually included in these trainings.
- Start a diversity, equity, and inclusion book club within your agency.

<u>Increase the diversity and inclusion within every level of your agency.</u>

- Implement an intentional, carefully developed DEI program informed through extensive inclusive engagement.
- Develop and provide training to your staff on cultural sensitivity; diversity, equity, and inclusion; and the importance of engagement.
- Revise your job postings to remove unnecessary requirements that exclude priority populations who have the lived experience to do the job. This could include the ability to lift 50 pounds, having a valid driver's license, or certain academic degrees when these requirements are not necessary to perform the job.
- Actively recruit a diverse workforce that includes people with disabilities and other priority populations. Disability Mobility Initiative notes that "there is no more important credential than lived experience."[6]
- Recruit and incentivize bilingual employees.

Case Studies: Agency-Wide Inclusion Policies

Minnesota Department of Transportation Vision, Mission, and *Unified Diversity and Inclusion Plan*

Minnesota Department of Transportation (MnDOT) is the principal agency to develop, implement, administer, consolidate, and coordinate state transportation policies, plans, and programs for aeronautics, freight and passenger carriers, ports and waterways, public transit, railroads, walking, and bicycling for the State of Minnesota. MnDOT's Vision, Mission, and Core Values and recruitment of employees focus on diversity and inclusion.

MnDOT implements its Mission and Core Values through its *Diversity and Inclusion Unified Strategic Plan (Unified D&I Plan).*[7] This plan was first developed in 2013 and is updated every five years by undertaking a comprehensive needs assessment. This includes staff engagement and conducting inclusive focus groups and surveys to solicit input from the public. In fact, the plan is currently being updated and public input has already directed changes. Based on input, MnDOT recognized it should renew its focus on racial equity issues and developed a Racial Equity Strategy to strengthen the *Unified D&I Plan*.

The *Unified D&I Plan* details goals in three critical areas: workforce and workplace environment; public engagement; and contracting.

Public Engagement Goals:

- Goal 6: MnDOT is seen as a trusted partner in developing equitable transportation solutions that work for communities served across Minnesota.
    - Design a dedicated feedback loop for MnDOT and key external partners.
    - Improve understanding of how transportation affects equity and identify transportation strategies and approaches that will meaningfully reduce disparities.
- Goal 7: All MnDOT projects have public engagement plans incorporated into the scoping process.
    - Create a culture of consistency and clarity across MnDOT with respect to roles, responsibilities and processes.
- Goal 8: MnDOT will demonstrate and share best public engagement practices.
    - Record management efforts for future reference due to legal requirements and turnover while also ensuring that what works can/will be replicated agency-wide.

Case Studies: Agency-Wide Inclusion Policies

King County Metro Mobility Framework

King County Metro in Seattle, Washington, is the Puget Sound region's largest public transportation agency. Metro provides bus, paratransit, vanpool, and water taxi services, and operates Seattle Streetcar, Sound Transit Link light rail, and Sound Transit Express bus service. In 2019, Metro began development of the Mobility Framework to inform how Metro allocates transit service, invests resources, and updates its existing policies in the future. The framework was approved in 2020.

The Mobility Framework[8] was cocreated through an inclusive process that was led by the 23 members of the King County Metro Mobility Equity Cabinet. The Equity Cabinet is a group of community leaders representing riders and a variety of organizations and communities countywide that are focused on low and no-income people; black, indigenous, and people of color; immigrants and refugees; people with disabilities and limited English-speaking communities. The Equity Cabinet drove the development of Guiding Principles and equity and sustainability-centered recommendations, worked with Metro to direct the consultant analysis and research, and helped draft the Mobility Framework document.

Guiding Principles:

- Invest where needs are greatest.
- Address the climate crisis and environmental justice.
- Innovate equitably and sustainably.
- Ensure safety.
- Encourage dense, affordable housing in urban areas near transit.
- Improve access to mobility.
- Provide fast, reliable, integrated mobility services.
- Support our workforce.
- Align our investments with equity, sustainability, and financial responsibility.
- Engage deliberately and transparently.

Recommendations in five thematic areas consolidate these principles: investments, surrounding land use, innovation, workforce, and engagement.

Metro is currently using the Guiding Principles and recommendations developed by this inclusive process to update or replace multiple policies, including Service Guidelines, the long-range plan, and the *Strategic Plan for Public Transportation.* These changes are also informed by engagement with the Equity Cabinet and stakeholders.

Read more about the Equity Cabinet in Principle 5.

2. GET TO KNOW THE COMMUNITY.

Being prepared leads to better outcomes. Doing the research will help you to identify who you should include and how best to include them, avoid cultural missteps, and help make your activities and plans successful.

Purposes

- Identify barriers, needs, and priorities and how these may differ by populations.
- Learn how to communicate with the diverse communities in your service area.
- Build trust with your community.

Addressing Barriers

A common barrier to inclusive planning is that your **community lacks knowledge and access to information**. Many individuals do not know that they can be involved, how transit planning works, or how to advocate for their needs. See case studies in the following pages from the U.S. Department of Transportation (DOT) "Leadership Academy" and Marin Transit on how to empower advocate leaders in your community.

Your agency might lack information about communities that you wish to include. One challenge commonly cited is how to access and engage limited English proficient individuals who do not often respond to surveys or attend in-person meetings. Some suggestions are provided in Principle 4.

Planners in tribal communities report that people with disabilities might not be included because many tribal communities lack information and data about tribal members with disabilities and do not have organized advocacy for people with disabilities. This often results in a lack of intentional outreach efforts to engage people with disabilities.[9]

Cultural competency is the practice of striving to recognize, to understand, and to communicate with people across cultures, particularly when the culture is unfamiliar. Developing cultural competency skills are critical to developing relationships with diverse communities, to building collaborative partnerships, and to earning trust when there is suspicion and old wounds persist.

Disabilities exist on a spectrum. Individuals with disabilities have varying abilities and may need diverse accommodations. Additionally, people experience disabilities in different ways. One solution for accessibility will not work for all individuals. The preferred approach is to address the barrier to participation and use people-first language ("person with a disability", not "disabled" or "handicapped") to focus on the person and their experience, not one facet of their identity.

Best Practices

Enter a community with humility and with the intention to learn.

- Be open to outcomes and input you did not anticipate.
- Ask and learn.
- Be genuine and authentic.

Utilize existing local data to identify priority populations and their needs.

People with disabilities, older adults, people with low incomes, and people of color are less likely to have reliable access to a car and more likely to rely on public transit. Do you know where or how to reach these communities?

- If your agency has developed a Title VI Program, you may know which languages are most commonly spoken in your service area.
- What do your surveys tell you about who you are serving — and who you are not?
- Conduct a demographic analysis. This might include:
  - Concentration of priority populations in your service area.
  - Proximity to transit (within ½ mile of a bus stop).
  - Mapping equity focus communities. (See examples below.)

Mapping Equity Focus Communities

San Francisco Metropolitan Transportation Agency (SFMTA) identified eight Equity Strategy neighborhoods based on the percentage of households with low incomes, private vehicle ownership, and race and ethnicity demographics. The analysis also included identifying routes heavily used by older adults and people with disabilities. Explore SFMTA's Muni Service Equity Strategy and maps on their **website**.[10]

Los Angeles Metro created the **Equity Focus Communities** (EFC)[11] designation to identify where transportation needs are greatest. The EFC Map considers the concentration of three characteristics: Low-income households; Black, Indigenous, and People of Color (BIPOC) residents; and Households with no access to a car.

<u>Conduct mobility audits and empower people with disabilities to lead audits.</u>

Mobility or walk audits are a proactive planning and assessment process focused on identifying mobility barriers, transportation needs, and solutions for people with disabilities. A mobility audit can focus on a neighborhood, specific intersection, or a transit center. Gather a group of diverse individuals — participants with disabilities and older adults, local elected officials, transit planners, and community leaders — to explore an area of your community on foot and with mobility devices. Make a detailed assessment of sidewalks, crosswalks, and bike lanes, taking notes and photographs.

AARP developed a comprehensive toolkit to guide planning and conducting mobility audits and presenting findings to the broader community. The free toolkit is available on [AARP's "Livable Communities" website](#).[12]

Best practices for mobility audits include:

- Measure walkability, biking potential, and/or transit connectivity.
- Include people with diverse types of disabilities. They experience streets, roads, and sidewalks in unique ways. Planners and engineers should also participate so that they can learn about mobility for people with disabilities.
- Educate participants about design and planning.
- Participants should define and prioritize improvements.

<u>Conduct qualitative research through interviews with community members or program participants</u>.

Personal stories can help to illuminate barriers and identify preferred improvements. This kind of qualitative data can be exceptionally rich and compelling.

- Interviewing provides an opportunity to practice active listening, a critical skill for many inclusive engagement techniques. Active listening is where you listen to not only hear what another person is saying but seek to understand the meaning behind it and work to draw out additional details.
- School and planners working on Safe Routes to School (SRTS) projects recommend interviews with children with disabilities, their parents, and school administrators as a best practice to understanding priorities, concerns, and potential accommodations to include students with disabilities in active transportation projects.
- See the case studies on the following pages for additional details.

Case Study: Qualitative Interviews

Disability Mobility Initiative Transportation Access for Everyone Storymap

Disability Mobility Initiative (DMI) is a project of Disability Rights Washington, a private nonprofit organization that protects the rights of people with disabilities across Washington State. Their mission is to advance the dignity, equality, and self-determination of people with disabilities. In November 2020, the Disability Mobility Initiative began interviewing people from every legislative district in Washington State who are nondrivers. From these interviews, they created the "Transportation Access for Everyone Storymap,"[13] an interactive webpage plotting these unique and rich transportation stories on a map of Washington State (Figure 3).

DMI found this process of personal storytelling incredibly enlightening. This human connection resulted in powerful information — from more than a hundred individual stories, DMI identified trends and commonalities and developed a White Paper of common barriers to access and inclusion, policy recommendations, and inclusive planning best practices.

(Transportation Access for Everyone Storymap, Continued on Next Page)
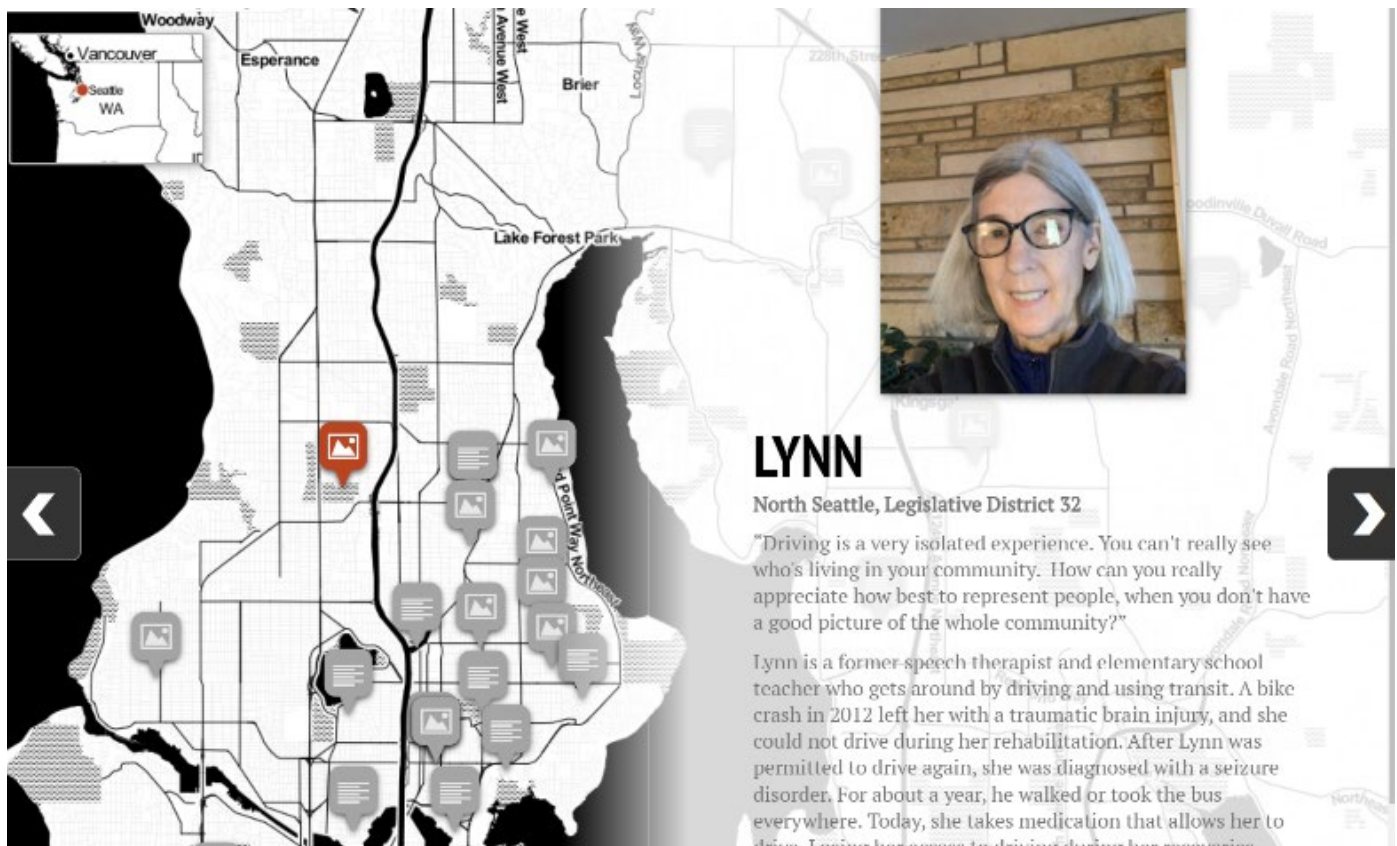
Figure 3, Transportation Access for Everyone Storymap provides personal stories of transportation challenges for nondrivers across the map of Washington State. Image from the "Storymap."

Case Study: Qualitative Interviews

(Transportation Access for Everyone Storymap, Continued)

Interview Topics:

- How participants normally get around?
- Barriers to getting around in their community?
- Impacts of transportation barriers to their everyday life?
- Improvement or change that would make it easier to get where they need to go?
- What would participants like people who drive to understand about what it's like to get around without a car?

Lessons Learned:

- Asking people to share their personal stories provided them with a sense of ownership and connection to DMI's work and campaign. People learned that they were not alone.
- This project focused on nondrivers, a population group that DMI found to be more inclusive, as they encountered many people who did not identify as disabled but faced transportation challenges.
- DMI had the most success using peer-to-peer recruitment to identify interview subjects. Working through their personal networks proved to help them build trust and relationships with participants. They successfully recruited participants through friends of friends, disability organizations, and immigration organizations. They struggled to recruit through riding buses in rural areas.
- Initially, DMI staff focused only on the qualitative data of personal stories. They returned, or are returning, to participants and asking them to complete a survey. They intend to use demographic data to understand who they spoke to and how far their efforts have reached. While this information has proved less revealing, it does enable DMI to report out additional metrics.
- Participants are compensated for their time.

3. ESTABLISH EARLY AND ONGOING COLLABORATION WITH KEY STAKEHOLDERS THAT CONTINUES THROUGHOUT EVERY STAGE OF THE PROCESS.

The most consistent recommendation from our research was to build and nurture relationships with community partners. It is vital to identify your stakeholders and develop and maintain collaborative and cooperative relationships. Meaningful engagement is difficult and takes time, and planners cannot do everything at all times. However, you can maintain and strengthen relationships with your partners. Your partners understand the people they work with — people with disabilities, older adults, and your other priority populations — and can provide valuable insight and guidance and spread the word about your initiatives.

Stakeholders might include:

- Program participants and potential participants, including people with all types of disabilities, older adults, and people from underserved and marginalized groups.
- Community-based organizations and nonprofits.
- Agencies that represent priority populations, such as human and social services, senior centers, independent living centers, and senior housing complexes.
- Community advocates.
- Local government, such as elected officials, and city and county staff.
- Healthcare representatives.

Purposes

- Seeking input early and throughout the planning process is inclusive; it enables your community to have a say in the decision-making process.
- Ongoing input provides crucial feedback about your program: is it meeting needs? Is it effective?
- Stakeholder engagement provides a connection for participants. It enables them to take ownership of and become advocates of the project or program.
- Working with trusted messengers is a tested best practice to accessing many priority populations. It is one of the only methods that some agencies have found

successful to connect with tribal communities, Limited English Proficient (LEP) individuals, and immigrants.

- Increasing communication.
- Building trust with your community.

Addressing Barriers

Lack of trust was reported across communities across the country. Seeking input before a decision has been made is a fundamental technique to increasing transparency and building trust. This can demonstrate to your community that they are not an afterthought. Additionally, working with trusted messengers in your community — the community-based organizations and agencies that your priority populations respect — is a critical way begin building trust and increase engagement.

Agency perception suffers when you do not talk to your community. When people do not feel good about your agency, it can become more difficult to get community buy-in for changes or get people to provide feedback and input.

Best Practices

Develop and maintain stakeholder lists.

Stakeholder lists or databases can be as sophisticated as your prefer. What's critical is that you identify potential agency and organization partners, find a contact within the organization who will champion your cause, and forge a relationship. Update your lists to keep up with staff turnover.

- We provided a starting place for developing a stakeholder list. This Excel tool in **Appendix A** lists common agencies by sector and priority population.

Develop project steering committees for your agency and for projects.

- Can you transform your advisory body into a steering committee that leads initiatives? How can you empower members to prioritize activities or focuses?
- Can you recruit a more diverse and inclusive membership that represents your priority populations?
- Consultants will identify stakeholders for a project but will not maintain that connection when the project ends. How can you continue cultivating and strengthening those relationships? Consider implementing frequent touches, a mobility summit, or inviting them to a formal, compensated steering committee.
- Read more about the King County Metro Equity Cabinet in **Principle 5**.

Advisory Committees

Trimet, the public transit provider for the Portland, Oregon, three-county region, maintains five advisory committees with distinct focuses.

The Transit Equity Advisory Committee (TEAC) provides insight and guidance on issues of equity, access, and inclusion. The 16 members are diverse community leaders who provide a link to community organizations and input on improving service.

The Youth Advisory Subcommittee (YAS) gives feedback and insight to the TEAC and provides a youth perspective to transit issues. Youth with connections to the community and bilingual and bicultural candidates are encouraged to apply. Meals and transit passes will be provided once they are able to meet in person.

Other committees include the Reimagine Public Safety Advisory Committee, Committee on Accessible Transportation, and the Small Business Equity Advisory Committee.

Educate and train community members and leaders to be better advocates.

Educating your partners on your planning processes and responsibilities helps them to help you and guide their communities.

Training advocacy skills empowers participants to become community leaders and ensures your engagement efforts yield useful inputs. See the case studies from the U.S. Department of Transportation "Leadership Academy" and Marin Transit on the following pages.

Most people do not automatically know how to do systems change advocacy. One planner begins each meeting with a brief training to provide tips on how to give input that transit agencies can use to make improvements. He asks transit riders to reflect on a trip that did not go well and provide input about:

- What would work for you?
- How could we make this trip better?

Engage current and potential riders or participants and return to the people who provided input.

Meaningful engagement is an ongoing, iterative process. Provide multiple opportunities for input before decisions are made. Then, let people know how their input was used, or why it wasn't. This increases trust and gives participants a sense of ownership of the effort. This type of active and meaningful shares the decision-making process with participants.

Principle 4 details engagement techniques.

Build and nurture relationships.

- Practitioners advise that it takes persistence to build some relationships. You must show up again and again and continue extending invitations to find the right champion.
- Find ways to make the relationship collaborative. What are your partners' needs? Assist your community-based organizations by promoting and attending their events. Provide travel training, technical assistance, and resources. Treat them like partners.
- Get to know your partners, especially when you are beginning to build a relationship. Take a partner out one-on-one for coffee or lunch to learn about their organization, their goals and priorities, and their background. This personal touch and investment helps to build the relationship and ensure the partner that you are seeking an authentic relationship.

Utilize trusted messengers.

Trusted messengers will vary based on your priority populations. They may be the agencies who work with people with disabilities or older adults. Or they may be peers who can spread the word among their personal networks. Peer-to-peer recruitment and word of mouth was reported as a successful best practice among small or rural communities, people with disabilities and many LEP groups.

Compensate the people providing their time and expertise. See Principle 5.

Case Studies: Educate and Train Community Members and Leaders

Marin Transit "Mobility Above the Bridge"

Marin Transit is the local transit provider for Marin County, California. The county, which is just north of San Francisco, includes rural and urban communities. Marin Transit provides fixed-route and Americans with Disabilities Act (ADA) services, as well as several specialized mobility options for older adults and people with disabilities through Marin Access services.

The "Mobility Above the Bridge Program" project provided advocacy training to community leaders (Figure 4).

Goals:

- Provide advocates and community leaders with a base level of information about how transit services are funded, planned, and governed so they can become better advocates.
- Clarify Marin Transit's services and responsibilities.
- Build trust and ease tensions following a procurement process that resulted in a new contracted operator.
- Provide tips for providing input and advocating on behalf of their communities.

Project Design:

- One-day invited workshop with registration requested.
- Invitees included: staff from community partner organizations and members of Marin Transit's Mobility Consortium and Paratransit Coordination Council.
- Pre and post surveys conducted to assess participants' goals and level of knowledge.
- Ron Brooks of Accessible Avenue was contracted to cocreate the presentation and lead the training.

Figure 4, Marin Transit's "Mobility Above the Bridge" advocacy training workshop aimed to give partners more knowledge so they can become effective advocates. Image from Accessible Avenue.

Case Studies: Educate and Train Community Members and Leaders

U.S. Department of Transportation (U.S. DOT) "Leadership Academy"

U.S. DOT created the "Every Place Counts: Leadership Academy" in 2016 to provide key background information and tools for emerging transportation leaders and other stakeholders who have limited experience with the transportation decision-making process. The Academy's call to action is "Learn. Engage. Make a Difference."

The "Leadership Academy" includes the following tools, which are available to download for free on the U.S. DOT website.[14]

Transportation Toolkit:

The Transportation Toolkit is geared toward members of the public who wish to learn how to engage in the transportation decision-making process at the local, regional, state, and federal levels. The Toolkit is written in plain language to demystify the decision-making process. It explains that transportation projects go through a predictable lifecycle. The Toolkit also defines key transportation acronyms and jargon using both text and graphics, civil rights and public involvement regulations, and highlights engagement techniques.

Notably, the Toolkit was refined based on feedback from those who graduated from the Academy, consisting of more than 100 members of the public who attended the inaugural Leadership Academy at U.S. DOT Headquarters in Washington, D.C.

Quick Guide: High-level overview of the Transportation Toolkit.

Facilitator Guide: To help agency staff plan a Leadership Academy in their community.

The Academy webpage also include stories from community leaders who used what they learned from the Leadership Academy or Transportation Toolkit to engage meaningfully with a transportation project in their community.

4. USE TARGETED COMMUNITY-SPECIFIC STRATEGIES.

Research and conversations with experts confirmed that inclusive transit planning requires using a variety of strategies and techniques and selecting the engagement method by population. Planners must be intentional and deliberate in targeting priority populations as traditional engagement methods may exclude these communities. Figure 5 demonstrates how King County Metro in Seattle, Washington, selected their engagement strategy based on the target audience.[15] Importantly, they utilized multiple methods for each community.

Populations for Intentional Focus	Tabling at Festivals	Tabling at Transit Centers	Surveys During Classes	Interviews with CBOs	Stakeholder Briefings	Online Survey
Black, indigenous, people of color	Yes	Yes	Yes	Yes		
People with low/no incomes	Yes	Yes	Yes	Yes		
Immigrants and refugees	Yes	Yes	Yes	Yes		
Limited-English populations	Yes	Yes	Yes	Yes		
People with disabilities				Yes	Yes	
Transit riders		Yes			Yes	
Metro employees					Yes	
Jurisdictional partners					Yes	
General public	Yes					Yes

Figure 5, King County Metro's Mobility Framework was informed by a robust community engagement process that utilized multiple phases of engagement where the method was selected to target a specific population. Image from the *Mobility Framework Report.*

Purposes

- Active and meaningful engagement.
- Improved accessibility.
- Increased and improved communication.
- Increased access to the decision-making process for priority populations.

Addressing Barriers

Meaningful and inclusive engagement is difficult and time-consuming work.
Inclusion goes beyond compliance with the Americans with Disabilities Act (ADA) and
Title VI. It requires research, energy, and persistence. Additionally, there are many types
of disabilities, and each may require a unique approach to accessibility and inclusion.
Practitioners often clash with budget, time, and resource constraints.

Many techniques we use are not truly accessible. People with disabilities are often
coping — using what works best even if it is not a perfect solution. This can reinforce
feelings of exclusion and mistrust.

People need to feel psychologically safe to provide input. Some practitioners have
found that working with a consultant provides a level of separation that can increase the
public's trust. Others have opted not to collect sensitive information, such as
demographic information, in venues where anonymity cannot be protected.

Best Practices

This list does not include the full array of inclusive practices, but those that were
commonly recommended in our literature review and by the experts we consulted. For a
thorough list of engagement techniques, review the U.S. Department of Transportation
(DOT) *Promising Practices for Meaningful Public Involvement in Transportation Decision-Making*.[16]

Make meetings accessible to diverse populations.

- Vary meeting times to accommodate diverse schedules.
- Select an accessible meeting location: Is the location served by transit and
  paratransit? Is the building accessible? Is your room configuration accessible for
  people using mobility devices?
    - TP4A's **"Planning Friendly Meetings" Tip Sheet** suggests approaches for
      planning accessible meetings that go beyond the ADA.[17]

We developed checklists to help you plan inclusive events and make inclusive
materials. Check out **Appendix B** for these tools for:

Collateral | Events | Transit Websites

- Consider moving away from formal board rooms, which may deter participation from some communities.
- Provide free transportation to public meetings and workshops.
- Conduct virtual and in-person events. More and more people have smartphones and are becoming familiar with virtual platforms, but not all have these devices or capabilities. Offer both meeting types to accommodate a variety of preferences and needs.

    - One planner saw an increase in attendance of people with intellectual disabilities when they transitioned to virtual meetings during the COVID-19 pandemic. These individuals were assisted by a family member or caregiver to provide input.
    - Tribal members, older adults, and limited English proficient (LEP) communities may prefer in-person activities with a face-to-face, personal connection.
    - Many virtual platforms are not fully accessible. Screen sharing on virtual platforms cannot be read by screen readers, so that content is not accessible to individuals who are blind or vision impaired.
    - Virtual meetings can also be challenging for people in rural communities or people with low incomes where Wi-Fi, a cell signal, or cell phone data are not a certainty.

Make materials accessible with appropriate accommodations.

- Use plain language — language that can be understood the first time your audience reads or hears it. Plain language is clear, concise, well-organized, and enables people to find what they need. Plainlanguage.gov[18] provides multiple resources.
- Provide translation, interpretation, and alternative formats.

    - Utilize your Title VI Language Assistance Plan, rider surveys, and other local data to determine for which languages you should always provide translations and simultaneous interpretation.
    - Develop and promote a way for participants to request language assistance and alternative formats.
    - Minnesota DOT's survey of inclusion techniques for people with vision impairments provides a rich list of best practices from across the county.[19]

- See the Collateral Checklist in Appendix B.

Solicit input and feedback through multiple channels, utilizing technology appropriately.

- Traditional methods of promoting events, such as direct mail, fliers, and news stories, have value, particularly in rural communities and among older adults.

- Social media is an important tool, but it is not accessible for all communities. Email is often preferred by people with disabilities because it works better for them. Offer opportunities from comment and promotion of input opportunities through both.
- Traditional comment/complaint lines allow your participants to provide ongoing input. Allow people to comment by phone, email, and mail.
- Focus groups provide an opportunity to get deep and detailed information from participants. Follow techniques for planning accessible meetings and be prepared to do your best active listening. Practitioners report successful outcomes when they keep focus groups to under 15 participants, set ground rules, and organize groups of people with something in common, such as the community where they live, the school they attend, or riders of the same service.
- Surveys should be available in multiple formats and languages. You will exclude certain communities if you only offer an online option. In addition to your online survey, conduct intercept surveying with paper questionnaires and tablets at transit centers, farmers markets, clinics, and other popular destinations for your priority populations.

Meet people where they are.

Work with your community partners to learn where priority populations travel, shop, live, and meet, and find or make opportunities to talk to people. Piggyback on existing events and locations that already attract your priority populations. Continually check in with partners about best places to meet their communities.

- Do tabling or intercept surveying at farmers markets, grocery stores, health clinics, senior centers, congregate meal sites or senior housing complexes, college campuses, or community fairs.
- Plan a focus group with older adults at the senior center following a meal or popular class.
- Ride transit buses and conduct informal interviews or on-board surveying.
- Go door to door in small communities. This approach is not realistic in all communities but can be incredibly effective in tribal communities and with LEP individuals. See the Pueblo of Jemez, New Mexico, case study on the following pages.
- Going to people is critical in rural areas. Rural communities often include bumpy, muddy roads, limited sidewalks, spotty Wi-Fi and cell signals, less resources and infrastructure, long distances (remoteness and isolation), and topography that makes it difficult for people to access transit — if it exists — and complicates participation in planning processes.

When Things Do Not Work

Something will go wrong. Or poorly. Here's the best advice from experts:

- **Ask:** Ask community leaders and partners when you do not know or receive conflicting input. Ask community members how they'd like to engage and their priorities. Ask community partners where to meet and how to reach priority populations.
  - o Avoid simply checking the box. People can tell and this leads to distrust.

- **Learn from your mistakes:** Review and reflect on feedback. Adapt. Evolve. Try again. And again.

- **Revise your strategies or approach:**
  - o One planner reported on an online survey effort with a terrible response rate from the limited English proficient (LEP) community. The survey would be used to recruit riders to join focus groups for a major service plan, and without these responses, that priority population would not be included. They knew a significant population of riders from one community were Spanish speakers, but they did not respond to the survey despite robust promotion. They regrouped and revised the approach after seeking advice from community partners. The new, successful approach was to meet these riders where they were: planners rode buses and conducted informal interviews with Spanish speakers as they traveled. Many riders were happy to talk and appreciated the one-on-one conversations. The planning team engaged a hard-to-reach community and identified a unique approach for this population.

- **Protect the process:** Ensure that everyone feels safes and has equal potential to be heard. For virtual meetings, this could include ensuring that security protocols are enabled, and staff understand how to use them. For in-person meetings, particularly those where controversial items may be discussed, it can be important to control the microphone. This could mean ensuring that the facilitator holds onto to the microphone as each participant speaks.

- **Build on existing work:** Many have been working on inclusion and equity projects both in and outside of the transit industry. Adopt best practices that have been tested by others.

Case Study: Pueblo of Jemez, New Mexico

Pueblo of Jemez (pronounced "Hay-mess") is a federally recognized tribe located in north-central New Mexico. About 2,500 Jemez live in the Pueblo, a very rural community, for which mobility and connectivity is a real challenge. The Pueblo Planning Development & Transportation Department (PDTD) has worked diligently over the past five years to implement ADA standards in their trails and active transportation projects. However, funding is incredibly limited and there are cultural reasons to keep certain areas of the Pueblo unpaved.

While developing or updating plans, the PDTD holds in-person meetings — a preference of the community — that are interactive and fun. Word has spread and meetings can include up to 75 to 100 participants. They use the following techniques to make meetings engaging:

- PDTD meetings are catered. Meals are an important part of this community's culture, and good food helps to attract an audience and make participants comfortable. Meetings are held in the early evening, as they found this time worked best. When participants arrive, they are invited to grab a plate of food and find a comfortable seat.
- Planners use Mentimeter software for interactive polling. This form of anonymous input is helpful for people who do not want to comment in front of a crowd, and it's engaging and fulfilling for participants to instantly see results.
- Planners ensure every participant leaves with useful swag (like a tee shirt or water bottle) or wins a big raffle prize. Raffle prizes might include big screen TVs and cultural items, such as chili cookers and locally made native cookware. Consultants are asked to make donations of swag or raffle prizes.

Among the Pueblo's residents, there is a population of people with disabilities and elders who are limited English proficient (LEP). Best practices that planners have identified for including these populations are:

- There was previously little known about the Pueblo's population of people with disabilities. The PDTD is working with partners, such as other departments and health centers, to identify and then engage people with disabilities.
- Bilingual planners who are Jemez go door-to-door to invite people with disabilities and LEP elders to meetings or provide information about a project or initiative. They found it more effective to share complete information in-person than through a flier or mailer. A next step they'd like to pursue is delivering surveys to Jemez people with disabilities.
- The Towa Language is not written. Bilingual tribal planners sit with LEP elders at meetings and assist with providing input or completing surveys.

5. PROVIDE PAYMENT AND INCENTIVES FOR PARTICIPATION.

Providing incentives not only encourages people to participate, but it is also respectful and is necessary for many communities. Everyone we consulted agreed and it was confirmed in all of the literature that incentives are vital for inclusive and equitable planning.

Purposes

- Recognize the value of participants' time, energy, and expertise (years of lived experience).
- Recognize that it can be a luxury for people to be able to participate. There can be a real cost to participation, including travel costs, time off work, and childcare.
- Encourage a higher response rate or level of participation.

Addressing Barriers

Participation can be a burden for people. We are asking for their time, energy, and expertise. People with disabilities may not have energy for long periods of work. For people with low or no incomes, participation can be a burden due to travel costs, childcare costs, and taking time off of work.

Restrictions from funding sources, especially federal and state funding, can be a barrier to agencies providing incentives. Some funding sources may not allow incentive-type payments, while others might require a prohibitive amount of paperwork for your agency or the participant.

Techniques to avoid these restrictions include partnering with the local transit agency to provide bus passes or asking your contractors to donate swag or other incentives. Contractors or consultants may be able to provide incentives in a way your agency cannot — also, they provide a buffer between your agency and the data (i.e., can alleviate fear of those who do not trust that input is anonymous.) Additionally, U.S. DOT has released **guidance**[20] that most program funds can be used for incentives.

Ensure that incentives are allowed through your funding source. Some federal agencies still prohibit providing incentives.

Best Practices

Compensate consistently and equitably.

King County Metro's Mobility Framework includes a recommendation that Metro develop "a list of compensation amounts for engagement tasks to avoid confusion or bias."[21] This recommendation was informed by an extensive input process. Additionally, Metro was advised to introduce equity into compensation amounts: participants for communities with fewer resources might receive a higher level of compensation than people from higher-income areas who may not require as much compensation.

Explore a variety of incentives based on the needs of your community and agency resources.

These might include:

- Bus passes or gas cards to offset travel costs.
- Free childcare at in-person meetings/events.
- Food at in-person meetings/events.
  - Practitioners report snacks are a critical icebreaker. Offering a nice spread of food gives participants something to talk about and can make them feel comfortable. Coffee is also appreciated in most communities.
  - Planners working with tribal communities reported that food is central to gatherings and it is disrespectful not to eat when food is offered.
- Provide commensurate payment for participating in a focus group or interview. The amount will differ by community and agency. We've seen:
  - $30 for 60-minute focus group.
  - $50 for a half-hour interview.
  - $25 Walmart gift card.
- Incentives for completing a survey.
  - Practitioners have found incentives go a long way to increasing response rates. One technique is a drawing: anyone who completes a survey can enter a drawing for one of several $100 gift cards.
  - Offer a $5, $10, or $15 gift card for a local coffee shop or grocery store.
- Provide free transit to in-person meetings/events on fixed-route or paratransit.
- Ensure engagement is a priority through your contracting process by creating budgets that are large enough to support a robust engagement process.
- Ensure your consultants build incentives into their engagement budgets.

<u>Compensate steering committees and advisory bodies.</u>

Committee members provide ongoing time, energy, and expertise. Disability Mobility Initiative argues that for people with disabilities, "compensation recognizes the value of our time and years of lived experience that forms the basis of this expertise, as well as the time and energy required for this consultation."[22]

Additionally, community partners could be compensated for their guidance and expertise with a donation to their organization or an honorarium.

Case Study: King County Metro Equity Cabinet

King County Metro's Equity Cabinet (Cabinet) in Seattle, Washington, is comprised of 23 community leaders representing riders and a variety of organizations and communities countywide, focused on low and no-income people; black, indigenous, and people of color; immigrants and refugees; people with disabilities; and limited English-speaking communities. The Cabinet led the development of the Mobility Framework and now is advising on policy updates and implementation across Metro.

Recruitment:

Many of the Cabinet members were previously part of an Equity Cabinet working on Parks and Open Space projects. These members were asked to transition to transportation to work on the Mobility Framework. Many did. However, there were some gaps to fill to represent diverse populations. These members were identified through existing networks, contacts, and partners.

As the Cabinet has continued, Metro conducted one open, public recruitment that included an application and interview process. This was promoted through community partners, Metro's website and social media, and targeted social media ads.

Compensation:

Members are paid $75 per hour. This covers time spent in meetings and reasonable meeting preparation, such as reviewing a presentation.

This amount was developed based on reviewing payments for multiple activities and identifying an amount that honored the participants' time and demonstrated the value of this challenging and important work. Metro is developing a standardized payment schedule, as recommended.

Meeting schedule:

The Cabinet meets once a month for 90 minutes.

Metro has found this effort remarkably valuable and successful and intends to continue the Cabinet. The structure is evolving in response to experience. They will introduce terms of 2–3 years to avoid burn out. They are considering staggered terms to prevent losing all the knowledge and momentum of the current group.

Lessons Learned:

- Provide transit orientation and training at the outset and for new members.

(Continued on next page)

Case Study: King County Metro Equity Cabinet, continued

- Use plain language. Avoid jargon and acronyms. This can be time-consuming and difficult work for transit staff and involves continued communication.
- Scale expectations about what can be done and the time it will take. Initially, agendas were too heavy as members brought their own questions, concerns, and unique perspectives. They now tackle about one big item per meeting to ensure there is enough time and to avoid overwhelming members.
- Equitable engagement requires time and ongoing communication. Metro staff is working to build more time into processes across the agency to allow for robust and inclusive engagement.
- Spend time with partners one-on-one in the beginning. Invest in getting to know them, their organization, and what is important to them. Have a conversation over a cup of coffee. That personal touch is important to building a relationship.

Successes:

- Building relationships has paid off. People feel invested and feel like they have been authentically engaged. They and Metro see the value. Many Cabinet members have become advocates and champions for Metro (Figure 6).
- Engaging youth has been valuable. Cabinet members have mentored youth to become community leaders.
- During the Mobility Framework process, the Cabinet advised on a technical analysis that a consultant was undertaking. They identified what analysis they were interested in and reviewed the results with Metro to refine the analysis. This process changed the outcome because the Cabinet has a different perspective than transit planners. The outcome was more reflective of multiple communities' perspectives and priorities.

Figure 6, Members of the King County Metro Equity Cabinet are leaders representing a diverse array of riders and community members. Image from the *Mobility Framework Report.*

6. EVALUATE OUTCOMES

Evaluating the impacts of your projects is essential to measuring success and continually improving. Experts should rely on a feedback loop to help them improve, to gauge the pulse of the community, and to respond better to shifting needs and priorities. Importantly, a truly inclusive process means the public — and your priority populations — was able to affect outcomes. Evaluation will provide tangible ways to demonstrate to participants how their input was used.

Purposes

- Helps you learn, adapt, and improve programs' effectiveness and ensure programs continue to meet needs.
- Increases transparency and helps build trust and community buy-in.

Addressing Barriers

This principle addresses several barriers discussed throughout this White Paper.

- Lack of trust. Transparency about what and how you measure a program's success helps build trust. Be clear about what data you are collecting, how it will be used, and the degree of anonymity and/or confidentiality you provide.
- Historically underserved communities have been excluded from the decision-making process. This contributes to a lack of trust, suspicion, and the perception of being an afterthought. It can also result in projects and programs that do not meet the needs of priority populations.
- Inclusive planning is difficult, time-consuming, and not often an agency's top priority. Performance metrics — especially consistent data tracked over time — are one way to convince your agency's leaders or board of the value of inclusive strategies.

Best Practices

Industry Best Practices

Texas A&M Transportation Institute conducted a thorough survey and analysis of best practices for performance reporting documented in their [Performance Measures for Public Participation Methods: Final Report](#).[23] This report also details sample performance levels, is organized into three tiers of engagement, and provides a sample framework for performance measurement.

Best practices from this study include:

<u>Stay flexible.</u>

This is sound advice for all aspects of inclusive planning. Flexibility will enable you to respond and adapt to community concerns and perspectives.

When measuring outcomes, this means utilizing evaluation techniques that suit the broadest possible range of circumstances. Your performance measures may need to respond as a project evolves and should be applicable to diverse projects over time.

<u>Distinguish outputs from outcomes</u>.

This report defines these as:

- Outputs: how many people attended or commented during an engagement activity (the volume of feedback). Outputs can help you assess the success of your promotion, your reach, and which communities are and are not included.

  Sample measures include:

  - Number and type of events held.
  - Number of survey responses or participants at an event.
  - Number of public comments received.
  - Demographic information of participants: race, gender, income, neighborhood/community of residence, agency affiliation, employment status, age, and disability that impacts mobility.

- Outcomes: how that participation affected and influenced the actual project. These are often opinion-based. They will help you measure the success of your inclusive practices.

  Sample measures include:

  - Did input received result in changes to the approach or outcome of the plan or project?
  - Did you report back to the public how their input was used?
  - Do participants feel like their input was heard and considered?

Both types of measures have value and should be included in your evaluation. This will involve using qualitative (words) and quantitative (numbers) metrics.

Track results over time.

When using the same measures over time and across projects, you can track trends and changes in public sentiments, and make improvements. The same measures must be used consistently to report out over time.

See the Minnesota Department of Transportation (MnDOT) case study on the following pages for an example of reporting across multiple years.

Keep it simple – Start small.

Start with what can be tracked consistently over time. You can add additional or revised measures as needed. The authors argue that: "most modest efforts can produce meaningful results if those efforts are consistently applied."[24]

Pathway to Inclusion Evaluation

The TP4A Pathway to Inclusion was developed to encourage inclusive and more nuanced discussions about what constitutes active and meaningful involvement in transit planning. The input of people with disabilities and older adults, as well as the experience of TP4A grantees, has been critical in the evolution of the Pathway. The Pathway is primarily a tool for communicating about inclusion with people with disabilities, older adults, and other populations. The Pathway can also be used by organizations seeking to plan for inclusion.

The Pathway can be used as a tool to monitor activities and determine how inclusive those activities are by determining Pathway levels for specific activities in which participants have been involved. It provides a way to evaluate the inclusivity of your agency, by using the following framework:[25]

- Track inclusive activities:
  - Record the meaningful and inclusive activities your agency conducts. Maintain a list by project or program.
- Review inclusive activities (inclusively):
  - Are people with disabilities and older adults actively and meaningfully involved in program planning/operations in your agencies?
  - Ask your community partners and steering committee members to conduct this exercise.
- Score the Pathway Level for each activity:
  - Do you have activities identified on Pathway Levels 4–6?

- Identify the overall Pathway Level:

    - Based on individual activities, what is your agency's Pathway Level?

- Report overall Pathway Level (transparency):

    - Use this indicator when reporting to your public. Identify a target to measure progress.

- Expand inclusive activities:

    - What inclusive activities can your agency adopt to improve your score and inclusion?
    - Ask community partners for suggestions or how they'd like to be involved.

Case Studies: Evaluating Outcomes of Inclusive Activities

MnDot Annual Performance Reporting

Minnesota Department of Transportation (MnDOT) performance management system spans its major products, services, and priorities. The agency uses performance data to inform decision making about investments and operational decisions, as well as provide accountability and transparency to increase the public's trust.

- MnDot tracks performance over time. They've tracked state measures since 1990 and federal measures since 2012.
- Performance measures are based on MnDOT's Core Values.
- MnDot tracks several measures related to Open Decision Making, which they aim to achieve through accountability, transparency, and communication (Figure 7).[26]

OPEN DECISION MAKING

Essential to open decision-making are the elements of accountability, transparency and communication. Transportation decision-makers are stewards of the transportation system and have the responsibility to make informed choices and be open about how and why decisions are made. MnDOT has continued to meets its goals for public trust, while working to better represent the demographics of Minnesota within the transportation system.

Measures	Target	Result & Score	Trend	Analysis
Public Trust - Share of survey respondents agreeing with the statement "MnDOT understands my needs…"	≥ 80%	72% (2021) ▲	73% (2015), 71% (2017), 67% (2019), 74% (2020), 72% (2021)	The majority of Minnesotans feel as though MnDOT understands their needs. This result has been fairly stable over the last five years.
Workforce Participation - Percent of total headcount for women & people of color (POC) on federally funded projects (Form FHWA-1392)	Tracking Indicator	11.1% women 12.9% POC (2021)	Women / People of Color: 9.4% / 10.1% (2018), 11.1% / 12.0% (2019), 11.3% / 12.6% (2020), 11.1% / 12.9% (2021)	During the last full week of July 2021, 11.1% of the people working on a federally funded highway construction project were women and 12.9% were people of color. Note: People of Color refers to racial and ethnic minorities, Form FHWA-1392.
Small Business Participation - Disadvantaged Business Enterprise program awards as a share of MnDOT administered federal funding	> 12.2% in 2019	11.2% (2021) ▲	9.3% (2017), 9.4% (2018), 10.5% (2019), 8.1% (2020), 11.2% (2021) [trend line 11.7%–12.2%]	MnDOT has identified achievement of DBE goals as a key component of earning customer trust. In 2021, 11.1% of federal higway construction dollars went to DBE's.

Figure 7, MnDOT measures Open Decision Making through three metrics: Public Trust, Workforce Participation of women and people of color, and Small Business Participation. These measures are tracked over time to demonstrate trends and scored based on an established target.

Case Studies: Evaluating Outcomes of Inclusive Activities

Boston Region Metropolitan Planning Organization

The Boston Region Metropolitan Planning Organization (MPO) develops a vision for transportation in the region and decides how to allocate federal and state transportation funds to transportation programs and projects that improve roadway, transit, bicycle, and pedestrian infrastructure. The MPO encompasses 97 cities and towns that are home to nearly 3 million people.

The MPO uses a performance-based planning and programming (PBPP) process that helps the MPO make informed decisions in accountable, transparent ways. Read more about the PBPP on the MPO's website.

MPO staff shared their experience with how tracking performance influences community engagement:

- The MPO tracks survey responses as they are received to identify if they need to include additional communities or demographics. When they are not hearing from a certain community, they will work with community partners to find another way to engage that community.
- By tracking what works and does not by priority populations, the MPO has a better understanding of how best to reach their target audiences. For example:
    - Twitter works to spread the word among advocates but is not effective with most members of disadvantaged communities. Facebook is a better avenue for reaching members of the public.
    - They have identified that virtual meetings have expanded their reach, enabling a large group of people who previously could not attend to participate. However, these meetings are not working for all communities. Tracking revealed that they need to do more in-person meetings to include limited English proficient (LEP) communities. In-person activities have proved to be most successful and critical to including and engaging LEP communities.
- The MPO is continually evaluating their engagement strategies to identify which are most effective and exploring better ways to evaluate strategies.

Implementing the Pathway to Inclusion

The principles and strategies outlined in this White Paper represent the inclusive practices at the core of the Pathway to Inclusion — the concrete activities to increase inclusion. Figure 8 graphically represents this, detailing some of the most important practices to implement the levels of inclusion. As the graphic illustrates, the levels of inclusion build on one another. Your program and projects will require activities at all levels — even as you aspire to higher levels of inclusion, you will need activities at Levels 1–3. Start where you are, implementing a handful of best practices at a time deliberately and thoughtfully to work toward a higher level.

PUTTING THE PATHWAY TO INCLUSION INTO ACTION FOR YOUR TRANSIT PLANNING PROJECTS

PARTICIPANTS PLAY LEAD ROLES IN PLANNING.
- Ongoing collaboration with compensated steering committee.
- New programs, service changes, and initiatives are recommended by program participants.
- Program design is tested and refined by participants.
- Removal of barriers to recruitment of diverse employees within your organization.

LEVEL 6 LEAD

PARTICIPANTS SHARE DECISION MAKING.
- Participants are involved throughout planning process.
- Dedicated engagement coordinator builds and nurtures relationships with community partners and participants.
- Participant input impacts decisions — and you demonstrate that to the public.

LEVEL 5 DECIDE

ACTIVE PARTICIPANT INVOLVEMENT IN PLANNING.
- Program design informed by community priorities and preferences identified through inclusive engagement.
- Stakeholder interviews and focus groups before and during plan formulation.
- Events are accessible to diverse populations by utilizing plain language, translation and interpretation.
- A variety of targeted techniques engage diverse populations.
- Multiple phases of engagement and varied opportunities for participant input.

LEVEL 4 INVOLVE

CONSULT PARTICIPANTS ABOUT PROGRAM.
- Key agency stakeholders identified and consulted about constituents needs.
- Survey or meeting to allow participants to preview and comment on program plans.
- Incorporation of participant feedback into final plans.

LEVEL 3 CONSULT

INFORM PARTICIPANTS ABOUT PROGRAM.
- Distribution of "how-to-use" service literature through multiple channels.
- Travel training programs.
- A variety of outreach events to market services.

LEVEL 2 INFORM

PROGRAM DEVELOPED FOR PARTICIPANTS.
- Program is planned based on data about participants.
- Minimal communication with participants during planning.
- Announcement of program via social media, website or new release.

LEVEL 1 DEVELOP FOR
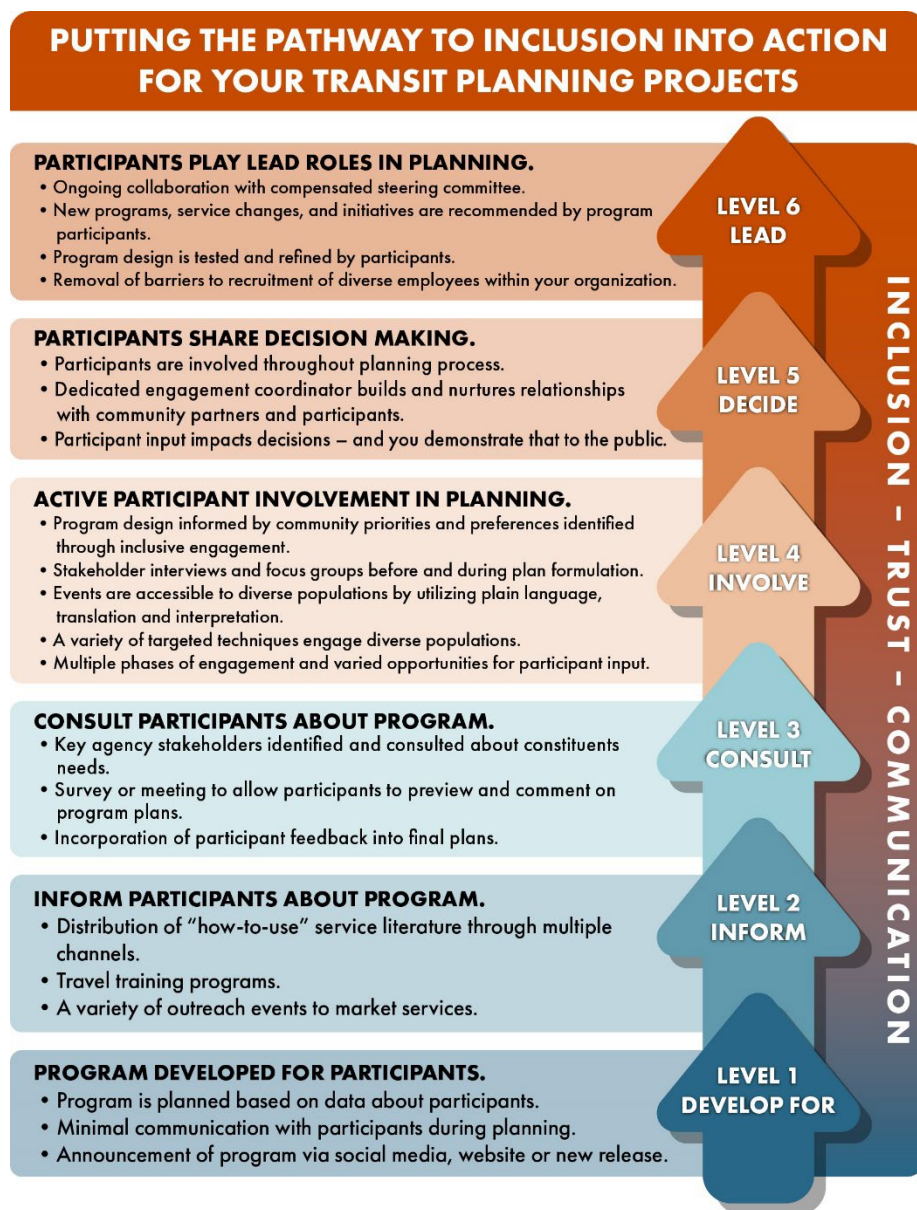
INCLUSION – TRUST – COMMUNICATION

Figure 8, Putting the Pathway to Inclusion into Action graphical tool details some of the most important inclusive practices for each level.

NEXT STEPS

Inclusive and meaningful engagement is difficult to undertake and time-consuming to do well. It can result in conflict with budget and resource constraints or entrenched attitudes. Practitioners recommend working on a small number of priorities at once. An inclusive approach to this would be inviting your community to cocreate your agency's priorities for improving inclusion. Ask your partners what else or what more you could be doing.

This research and paper didn't address sustainability in your agency's inclusion efforts. An important next step once you begin to implement inclusion is to plan for continuing your work. This might include sustaining inclusion efforts of individual projects through staff turnover, budget constraints, or changes in strategy; sustaining involvement of priority populations; and sustaining relationships with partners through staff change, loss of interest or loss of support. TP4A has created a guide to sustainability as part of its **Inclusive Planning Guide.**[28] This webpage details the institutional aspects of planning, implementing, and continuing inclusive planning.

Finally, it is important to define success for inclusive transit planning practices. The experts we consulted offered the following conceptions of success:

- When participants acknowledge their input was heard and affected decisions.
- When people take ownership.
- When people perceive that what they are saying has an impact.

Your agency will benefit from developing its own measure of success or a target level of inclusion — ideally, informed by input or cocreated with your community. The guidance in this White Paper is intended to assist your agency in achieving those measures.

ENDNOTES

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ADDITIONAL RESOURCES

Boston Region Metropolitan Planning Organization (MPO). (2021). *Public Engagement Plan.* https://www.ctps.org/public-engagement

- Boston Region MPO's Public Engagement Plan is robust and carefully developed. The plan includes specific methods to provide accommodations for people with many types of disabilities, and it also provides a thorough checklist for ensuring a meeting space is accessible.

Garcia, Ivis, Andrea Garfinkel-Castro, and Deidre Pfeiffer. (2019). *Planning With Diverse Communities.* **PAS Report No. 593. American Planning Association.**

- This report offers the information and tools planners need to engage people of color in planning processes and improve quality of life for all in ethnically and racially diverse communities. Chapters focus on frameworks and approaches to better engage people of color in planning processes, and tools and strategies to improve transportation access, among other topics.

National Academies of Sciences, Engineering, and Medicine. Transportation Research Board; National Cooperative Highway Research Program. (2019). *Measuring the Effectiveness of Public Involvement in Transportation Planning and Project Development.* **The National Academies Press**. https://doi.org/10.17226/25447

- This study offers organizations the tools to create a systematic approach to documenting and managing public engagement processes. This approach can both identify areas for improvement and demonstrate how the public's engagement in the transportation decision-making process leads to more efficient project or plan development. It can also be a mechanism to show the public how their input is used. This study provides sample frameworks and tools for performance measurement.

National Aging and Disability Transportation Center (NADTC). (2023). *Listening to Riders and Providers: A Synthesis Report on NADTC's Focus Group and Stakeholder Meetings.* https://www.nadtc.org/resources-publications/resource/listening-to-riders-and-providers-a-synthesis-report-on-nadtcs-focus-groups-and-stakeholder-meetings/

- This report summarizes the findings from a series of focus groups and stakeholder meetings in 2022 that explored transportation issues of diverse communities across the country. The report details challenges and barriers to access and identifies next steps in NADTC's Transportation DEI work.

National Indian Council on Aging. (2023). *Understanding Disabilities in American Indian & Alaska Native Communities Toolkit Guide***, National Council on Disability.** https://www.nicoa.org/programs/technical-assistance-and-resource-center/disabilities/

- This toolkit is dedicated to increasing awareness and knowledge of the needs of American Indian and Alaska Native persons living with disabilities. The toolkit contains information about disabilities, tribes, and resources. It provides suggestions for improving services, providing protections, and utilizing resources in local tribal communities for people with disabilities. The chapter on transportation presents models from tribal communities that resolved transportation challenges.

Safe Routes to School National Partnership. (2018). "Engaging Students with Disabilities in Safe Routes to School." https://www.saferoutespartnership.org/resources/fact-sheet/engaging-students-disabilities-safe-routes

- This info brief provides an overview of Safe Routes to School best practices for including children with disabilities in active transportation projects. The fact sheet includes program examples and additional resources.

Transportation Planning 4 All. "Resources" https://transitplanning4all.org/resources/

- This online library provides items discussing inclusive transportation planning practices and ideals, including webinars, podcasts, toolkits, presentations, and news.

APPENDIX A. STAKEHOLDER LIST TOOL

This template can be used to develop your own stakeholder list by identifying contacts in these common sectors and organizations.

Sector	Focus	Organization	Contact	Title	Email	Phone	NOTES
Education	Young Adults	University/Colleges					
Education	Young adults	Adult Schools					
Education	Youth	Middle/High Schools					
Education	Youth	School Districts					
Education	Youth with Disabilities	Special Education Programs					
Soc Serv	Low Income	Human Services					
Soc Serv	Low Income	Public Housing					
Soc Serv	Low Income	Employement Programs					
Soc Serv	Older Adults	Senior Centers					
Soc Serv	Older Adults	Area Agency on Aging					
Soc Serv	Persons with Disabilities	Behavioral Health					
Soc Serv	Persons with Disabilities	Employment Programs					
Soc Serv	Persons with Disabilities	Centers for Independent Living					
Medical	All	Public Health Department					
Medical	All	Health Clinics					
Medical	All	Community Health Centers					
Medical	All	Hospitals					
Medical	Older Adults/PWD	Assisted Living Facilities					
Employment	Workforce	Major Employers					
Employment	Workforce	Service Employers					
Employment	Persons with Disabilities	Employment Programs					
Recreation	All	Recreation Department					
Recreation	Youth	After School Programs					
Communities within Service Area (Counties, Cities, Towns)		Planning Staff					
		Human Services Director					
		Public Health Director					
		Elected Officials					
Advocacy		Advocates for Disadvantaged Populations					
Advocacy		Advocates for Public Transit Services					

APPENDIX B. PLANNING CHECKLISTS

These tools provide a starting place to make your materials and events accessible and inclusive for your priority populations.

Developing Inclusive Collateral

☐ Uses Plain Language: Clear, concise, and simple; no jargon or acronyms; easy to understand.

☐ Avoids using too much text.

☐ Translated into limited English proficient (LEP) languages.

☐ Uses Sans Serif font, such as Arial, Calibri, or Verdana.

☐ Uses adequate font size (12 pt minimum).

☐ Uses uppercase, Italics, and underlined text sparingly.

☐ Includes alt text for visuals.

☐ Uses actual text, not an image of text.

☐ Uses high contrast for text and background colors and images.

☐ Links are stylized differently than text.

☐ Alternate formats are available if requested.

☐ Avoids using tables.

☐ Does not use color alone to convey information.

Additional Resources

- Word Support best practices for accessibility for Word documents.

- Best practices for documents created with Canva:

  https://www.youtube.com/watch?v=GGR8UDCdi14

  https://www.canva.com/help/canva-accessibility-features/

Planning Inclusive Events

☐ Location is accessible for people using wheelchairs or walkers.

   o Follow techniques from "TP4A Planning Friendly Meetings Tip Sheet."
   https://transitplanning4all.org/resources/tip-sheet-planning-inclusive-meetings/

☐ Room configuration is accessible for people using wheelchairs or walkers.

☐ Promoted through multiple channels, including community partners.

☐ Interpreters or bilingual staff are present to assist LEP participants.

☐ Free transportation provided on fixed-route and paratransit services.

☐ Input can be provided through multiple methods.

☐ Incentives and/or payment are provided to participants.

☐ Techniques and methods are selected based on target population.

Additional resources:

TP4A: Holding Inclusive Events: A Guide to Accessible Event Planning." This guide has the instructions to set up accessible events and conferences.
https://transitplanning4all.org/resources/inclusive-events-guide/

Building an Inclusive Transit Website

☐ Website is easy to find. (Simple URL.)

☐ Provides text in multiple languages or includes Google translate widget.

☐ Clearly and quickly answers questions of first-time riders/participants.

☐ Meets information needs of long-time users/participants.

☐ Easy to use: clean design and clear navigation.

     o Uses headers and spacing to group related content.

     o Used high contrast for text and background colors and images.

☐ Includes interactive, easy-to-use map or system and routes.

☐ Website is mobile responsive and works on all device-types.

☐ Provides real-time arrival information.

☐ Uses HTML schedules (not image or pdf.)

☐ Includes alt text for images.

Additional Resources

- National Rural Transit Assistance Program's (RTAP) Website Builder. Since 2011, Website Builder has allowed users to create and design websites that are hosted on the National RTAP server free of charge. **https://www.nationalrtap.org/Technology-Tools/Website-Builder**

- National RTAP Marketing Toolkit. National RTAP also offers a marketing toolkit with a webinar about developing a customer-focused transit website, among other tools. **https://www.nationalrtap.org/Toolkits/Marketing-Toolkit/Welcome**

- Web Accessibility Initiative provides detailed tips for designing, writing, and developing for web accessibility. **https://www.w3.org/WAI/tips/**