

Inclusive Coalition Building

Lewis and Clark County Case Study

Goals and Objectives

The primary goal of the *Inclusive Coalition Building* project is to improve transportation for all, including public transit and specialized transportation services, through broad engagement of citizens – both in the City of Helena, Montana and outside the city limits. Currently, local transit service (provided by the Helena Area Transit Service, or HATS) is limited and ridership has declined for each of the last five years. This project worked to strengthen the already existing Transportation Advisory Committee (TAC), a requirement for receiving Federal Transit Administration 5311 funding, by utilizing education, training and other outreach approaches to support a stronger voice for citizens in advising and guiding the lead agency, the City of Helena. Project staff and consultants worked closely with stakeholders, a diverse group of people with disabilities and seniors to review the transportation system, help identify gaps and participate in other engagement strategies; conducted community surveys to identify mobility needs and attitudes; and gathered and analyzed data to support informed decision-making. Improved marketing and better communication among all the stakeholders – passengers, drivers, government officials and the general public – was identified early as an important component of project activities. A comprehensive marketing plan, new, high-profile branding for buses and bus stops and user-friendly passenger information tools, including a passenger guide and website, were developed.

Initially, project participants did not understand the breadth of knowledge needed to both operate and improve the public transit system. The project has largely succeeded in increasing understanding of how the system runs and what works best for all users by those who are actively involved in the project. Issues, problems and needs have been identified through surveys, interviews and a review of data and better, more refined solutions reflecting citizen input are being developed.

Project Management

The *Inclusive Coalition Building* project is managed through a collaborative effort between Lewis and Clark County and the Helena Area Transportation Advisory Committee (the “TAC”). The project leveraged the grant resources to engage consultants with expertise in branding/marketing; routing/scheduling; and coordination. The consultants – Nelson Nygard, Transit Marketing and the Western Transportation Institute – worked with TAC subcommittees and TAC as a whole to develop and finalize specific tasks.

The TAC served as a steering committee for the project and conducted the planning charrette workshop with stakeholders in August 2014. Four working groups, made up of both TAC members and other stakeholders and interested parties, oversee and assist with the work: the Riders Council; the Capital Transit Coalition (formerly the Policy and Funding Advocacy Coalition); Marketing and Communications; and the Coordination Committee.

The volunteers – older adults, people with disabilities and other stakeholders – who participated in the project were amazingly generous with their time and exhibited a high level of enthusiasm and dedication to the project. Given the former Transportation Advisory Committee’s lack of engagement and commitment, this was surprising and very gratifying.

The high level of stakeholder and community engagement was greater than expected. As a result, the community and the project moved more quickly than anticipated. Any changes in operation or policy of the local transit system operated by the City of Helena must be considered and voted on by City Commissioners.

The HATS Transit Manager supported the project from the outset and first approached the county about submitting an application for the grant. Because of funding constraints, the Transit Manager position is part-time, making it difficult at times for the Manager to respond to the numerous requests for data and budget numbers generated by the project. There were times when requested information could not be provided quickly. There is a sense among all involved that concrete progress in achieving any of the specific recommendations that have emerged from the planning process for improving the transit system (e.g., opening a new bus route) must be seen in order to continue moving the project forward. Recently, the City Commissioners voted to delay adoption of the new name of the transit system until the new routes are operational. One change has occurred: the newest bus in the transit system has been painted in the colors recommended by stakeholders.

The project website and other electronic tools aided communication and supported the project’s efforts to engage stakeholders and community members. *SurveyMonkey* was used at different stages of the project to conduct surveys. Frequent email contacts and the use of *GoToMeeting* for web conferences supported the broad reach of the project. Online polling tools allowed participants to prioritize and provide feedback on transit logo alternatives. The project’s website currently displays the proposed route map for the planned expansion of transit service that has been endorsed by project participants. This specific recommendation came from the project participants – it was not identified at the beginning of the project as a goal but is an outcome of the project itself. The site enables feedback on the route from community members. Verbal presentations supplemented this visual information to ensure that community members with visual impairments were able to understand what is being proposed and had the opportunity to provide feedback. *NationBuilder* software tracked

interest in the project, organized meetings and managed communications. Key TAC documents, including the new member packet, were made available for download.

To communicate with external audiences, the project held several large group presentations, numerous small group presentations, one-on-one conversations, public meetings and media outlets. One-on-one and small group communications (e.g., phone calls and in-person meetings) proved to be most effective in engaging seniors and people with disabilities and ensuring widespread involvement in TAC- related opportunities. The least effective engagement strategy was emailing.

Inclusive Planning

The project's outstanding success is the creation of a fully functioning and deeply committed Transportation Advisory Committee (TAC) that includes broad representation of seniors and people with disabilities who were recruited early in the project through one-on-one interviews. After initial contact, those who wanted to be more involved became members of the TAC or the Riders Council. These individuals have built a vested interest in the anticipated outcomes of this project and are committed to seeing it through.

Efforts early in the project to solicit information about the transportation needs and review proposed strategies with seniors and people with disabilities were pivotal to ensuring that the work of the project aligned with what was considered important by participants. Outreach was conducted with a variety of local groups, agencies and organizations that represent seniors and people with disabilities (e.g., Human Resource Advocates, Helena Citizen Council, Montana Council on Developmental Disabilities). Current transportation riders were also contacted. The invitation conveyed the message that as frequent HATS users, their input into how the system could be improved was invaluable and that they would be the first to benefit from system improvements. Outreach events were held at locations with nearby transit stops. An open invitation was issued to join the TAC and/or attend as many meetings as possible.

The Riders Council consists of two seniors and three persons with disabilities. While not playing an official role in developing and moving the project forward, the Council has the potential for continuing as an advisory body after the project is completed. The five-member group seeks to improve the rider experience. The informality of the group helps as members know the transit drivers by name and which dispatchers are most helpful. They routinely talk to riders and have contributed unique insight. Each member rides the bus as an official, recognized representative of the Riders Council. In that role, they are able to obtain information continuously from other riders.

The TAC benefits from the consistent participation of member organizations that represent seniors and people with disabilities and has experienced very little turnover since the project's inception. These organizational members regularly update and solicit feedback from their organizations, as well as Riders Council members. Their feedback is shared with the group at monthly meetings where planning opportunities are identified to encourage older adults and people with disabilities to get directly involved.

The TAC recently conducted a self-assessment and developed the FY 2015 Action Plan, which must be created each year and submitted to the City Commissioners. The 2015 Plan is based on the assessment findings and the input received during the planning workshop convened to obtain recommendations from TAC members and the broad group of stakeholders engaged in the inclusive transit planning project. Seventeen TAC members and other local seniors and people with disabilities participated. The Action Plan received the endorsement of the entire TAC and was accepted by the HATS Board and submitted with its 2015 application to the state of Montana for Section 5311 rural public transportation funds. As funds become available, the transit agency is focusing its efforts on rebranding and the implementation of a two-route local transit system.

Forward momentum of the project now rests with HATS and its ability to produce visible evidence of change in the near future. The project has been successful in generating community engagement in an inclusive and open planning process to improve the current transportation system and extend services to more riders. In particular, the Transportation Advisory Committee (TAC) has emerged as a strong, independent voice.

However, due to the disconnect in timing between the project — which has moved forward quickly — and the city government's slower response plus the need to obtain funding to implement recommended changes, an impasse may result if meaningful improvements, such as better transit services, new routes, a more informative website and changes in the way planning goes forward are not seen in the short term. There remains concern that the project has not influenced the way the City of Helena sets goals, objectives and a vision for transit's future. Given concerns raised by city officials, it is also feared that the inclusive and coordinated planning process established through this project will not continue and that citizens will lose interest in further engagement.

Nevertheless, the TAC is well-equipped to assist the City of Helena in administering an inclusive transportation planning process. And the project has impacted the planning process of at least one member organization: Helena Citizens Council will undertake a comprehensive community visioning project to address a number of areas, including transportation. As noted earlier, it is likely that the Riders Council, currently chaired by a member of the Rocky Mountain Development Council, will continue. A number of TAC members and other organizations (such

as Helena Resource Advocates) are committed to continuing the efforts begun under the project's auspices.

Stakeholders

An e-list consisting of TAC members and supporters includes more than 75 key community members. TAC members include the following:

Area IV Area Agency on Aging	Montana Council on Developmental Disabilities
Capital Taxi	Montana Vocational Rehabilitation
City of Helena Commissioner	Montana Independent Living Project
City of East Helena Mayor	Montana Public Employees Association
Department of Health and Human Services	PEERS, Inc.
Easter Seals	Riders' Council Members (5)
Helena Citizens Council	Rocky Mountain Development Council
Helena Food Share	St. Pete's Hospital
Lewis and Clark County Commissioner	United Way of the Lewis and Clark Area
Lewis and Clark City/County Health Department	WestMont
Montana Association for the Blind	

Outcomes

The major outcome of the project is the creation of a larger and broader Helena Area Transportation Advisory Committee (HATAC) that includes seniors and people with disabilities as active participants (e.g., consistently attending meetings). The TAC is also more educated about transit planning and ADA policy and requirements applicable to transit routes, infrastructure and curb-to-curb paratransit. Equally important, TAC members succeeded in turning their desires for better transportation services into concrete actions ready for implementation.

A second, related outcome is the development of a 2015-2016 Transit Coordinated Plan, developed by the TAC with broad stakeholder input, that integrates a set of recommendations that were developed through an inclusive planning process. Among other recommendations included in the plan, the TAC has unanimously backed the implementation of two new fixed routes in the Helena area and providing the required ADA paratransit service; and adoption and integration of the new TAC branding recommendations for HATS. Members of the TAC who have disabilities have played a pivotal role in the development of the ADA transition plan. The City of Helena is currently in the process of implementing these recommendations as funds become available and refining the recommended two-route system and stops, including required complimentary ADA paratransit.

These outcomes could not have been achieved without the participation of older adults, people with disabilities and other stakeholders involved in this project. Further, as users of the transportation system, participants provided insights into what improvements are most likely to work. The TAC's ability to reach consensus on rebranding in one afternoon meeting (i.e., new name, brand, color scheme) reflects the trust and respect developed among the members as well as the education of members regarding the importance of moving forward together to find workable solutions.

There is increased general public awareness and knowledge of transit in the community. Business owners, state government and the institutes of higher education are now asking if they can be included as an additional bus stop on the new fixed routes.

Challenges

The project's primary challenge is the current lack of concrete evidence that the hard work and extensive involvement of so many citizens and stakeholder groups in the transportation planning process will actually bring about desired change in the area's transportation services. At this point, anticipated improvements in the system are still only on the horizon. As noted earlier, the City of Helena's ability to make change and obtain necessary funding to support planned improvements has not kept pace with the high level of engagement and rapid progress of the project. The relationship between the TAC and city officials has become somewhat strained and there has been a recent decline in engagement as the project has moved to address the more technical aspects of making improvements in the transportation system. The worst-case scenario is that if some improvements are not put in place soon, participants will withdraw and the hard work of the last two years will be lost. There is also concern that the City of Helena will not embrace coordinated transportation planning and the TAC will not be as involved in transportation planning in the future as it has been during the project.

Lessons Learned

Providing opportunities for open dialogue, community engagement, and an atmosphere that welcomes all ideas and suggestions are the most important factors for enhancing participant involvement in coordinated transportation planning. This approach has produced concrete results in the Helena area: participants have embraced inclusivity and learned how to plan coordinated transportation; the broader community has responded enthusiastically to opportunities to provide input into the plan; and citizens have learned about public and specialized transportation and how it might be possible to make those services more responsive to community's needs.

Potential participants, whether seniors, people with disabilities or stakeholder organizations, must be educated about the transportation system and the coordinated planning process so they can fully understand the situation and contribute in a meaningful way.

It is vitally important to keep all partners informed and engaged as coordinated transportation planning moves forward. Related to this is the need for a better understanding of local bureaucracies so that all participants have an appreciation for competing priorities and timing issues (such as funding cycles) which can slow progress. While the city and county were on board and committed to improving transit from the beginning, the pace of the project moved ahead much more rapidly than anticipated, which led to a disconnect in expectations regarding when concrete improvements would happen. Compliance with ADA requirements for designing new routes and determining bus stop locations was not fully incorporated into the planning as it moved forward, so near the end of the process, ADA issues had to be incorporated into the plan.

Some of the stakeholders involved in the inclusive planning process feel that for effective and ongoing inclusive planning and operations to continue, a new lead agency (entity that operate public transit) needs to take charge of the public transportation system. A Transportation Authority model is being explored.