

Inclusive Planning Guide

By Transit Planning 4 All



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Introduction to Inclusive Planning

“If they don’t give you a seat at the table, bring a folding chair.”

— Shirley Chisholm

Transit Planning 4 All is dedicated to ensuring that no person or group needs to supply their own chair to be included in making the decisions that profoundly impact their ability to live independent and productive lives. In this guide you will find resources to help communities plan, conduct, evaluate, and sustain inclusive planning programs to improve local transit services.

Transit Planning 4 All (TP4A) was a transportation-planning project that sought to explore and promote the practice of inclusive planning. Begun in 2013 through funding from the [U.S. Department of Health and Human Services’ Administration for Community Living](#), the project promoted the development and dissemination of best practices in transportation planning inclusive of people with disabilities and older adults. A major component of these efforts was funding a series of demonstration projects, each seeking to increase inclusion in transportation planning. These projects focused on furthering inclusive planning practices at the local level.

This guide to inclusive planning is built from the knowledge and experience gained from the local projects sponsored by the ACL-funded Transit Planning 4 All program. This is a brief step-by-step introduction to the inclusive planning process. It is our belief that thoughtful and sincere inclusive planning leads to better programs.

Outcomes from the inclusive process include:

Shared Knowledge

As the participants in the process work together, they learn from each other and create solutions based on this sharing.

Support for Implementation

Groups and individuals involved in the design of a project will become advocates for the project as it moves to implementation and beyond.

Sensitive Design

Transit programs designed by those using the service will be more sensitive to their needs.

Building Community Capacity

In addition to improving the transit program, the process of inclusive planning builds the knowledge and skills of participants that they can take into other aspects of community building.

Reasons Inclusive Planning is of Value:

For Transit Planners

Federal statutes and guidelines have long required public participation in planning transit projects.



Inclusive planning enables significant involvement of impacted communities. While these efforts allow comment on specific projects, many transit agencies are going beyond traditional public meetings to embrace a more inclusive approach and flexible strategies to support the planning process.

For Persons with Disabilities

For persons with disabilities, involvement in the transportation planning process is central to full inclusion in community life. The landmark Americans with Disabilities Act (ADA), which became law in 1990, was the first step to ensure that people with disabilities have the same opportunities as everyone else to participate in the mainstream of American life. Public transportation facilities and service requirements are an important part of the promise of the ADA.



For Older Adults

The Older Americans Act, passed in 1965, and its subsequent amendments have created a federally-mandated, state and local aging network that is comprised of the federal Administration on Aging, State Units on Aging, and local Area Agencies on Aging (known as AAAs). Services provided by AAAs are determined by federal law, but are guided by a planning process that emphasizes community engagement to determine the most important needs of older adults in each community.



A well-developed and inclusive planning process goes through five phases outlined below. You may explore these individually or work through each in sequence.

- Explore
- Design
- Implement
- Evaluate
- Sustain

Phase 1: Explore

Introduction

Understanding where you are makes it easier to work towards inclusion.

Assessment Before Planning

The key question is: “Where are you starting from?” It is important to have a clear picture – a baseline – of where you’re beginning; what inclusive practices are already in place and what transportation needs will be addressed by the initiative. A baseline assessment, at a minimum, should answer the following questions:

- What transportation needs exist in the community?
- What needs do participants identify as most important to address?
- How inclusive is transportation planning now and how does it identify transportation priorities?

The assessment process can include gathering information from a wide range of participants, partners and stakeholders, and should include people or partner organizations committed to being involved. If possible, include those whose interest in the initiative is limited, but who will be impacted by the work to be undertaken.

Information gathering methods, like surveys, public forums, interviews, focus groups and others are ideal during this phase of the project. The Transit Planning for All team has developed the Pathway to Inclusion to help communities assess their current level of inclusion and develop methods to improve inclusive practices.

Perception Versus Reality

Many organization leaders feel they are using an inclusive approach, but that doesn’t mean they are. Do different populations of transportation-challenged individuals, especially older adults and people with disabilities, feel included in conversations and initiatives involving transportation?

Examples from the Field

At its first grant steering committee meeting, [Clovernook \(Cincinnati, OH\)](#) provided Pathway to Inclusion training so the steering committee members would have a consistent understanding of the Pathway. The training PowerPoint including Braille format/copies so it would be accessible to participants with visual impairments.

[Oregon Cascades West Council of Governments \(Albany, OR\)](#) identified barriers/needs/problems with current and historic outreach efforts at the beginning of their grant.

[Central Vermont Regional Planning Commission \(Montpelier, VT\)](#) used a community meeting to develop a list of barriers that older adults and people with disabilities have with the existing transit system and the potential changes that paratransit would bring.

Here are some in-depth questions to ask:

- Do participants (people with disabilities and older adults) feel included?
- If meetings are open and advertised, do participants attend?
- Is the meeting being held in a time and place in which they can participate?
- Is a meeting the best type of forum for being fully inclusive?
- Can inclusive public participation be accomplished at community events or venues or via social media?
- If participants attend, are their opinions sought?
- If their opinions are sought, do those running the meeting take the time to ensure that what they are hearing is what the participants intended?
- Are surveys conducted to determine if participants are satisfied with inclusion or if they feel their voices are heard?
- Is there a system in place to track whether participant suggestions are vetted and implemented?
- Do participants share in the decision-making process? Do participants play leadership roles in your organization or partnership efforts?

Honesty Is the Best Policy

To assess the degree of inclusiveness in your transportation planning efforts, engage in candid discussions involving people with disabilities and older adults using questions such as those listed on this page to create an open and honest dialogue. Remember that different programs and partner organizations may be at different levels of inclusiveness.

Examples from the Field

[Boulder County Mobility for All \(Boulder, CO\)](#) M4A conducted phone surveys of participants interested in joining the steering committee and used the results of those interviews to determine the times and locations to hold steering committee meetings. Some participants referred us to community organizations that could help with recruitment of a diverse group of individuals.

[Oregon Cascades West Council of Governments \(Albany, OR\)](#) asked participants about the best places to reach them in their communities insure they will continue to be engaged.

[Easterseals of Massachusetts](#) (Worcester, MA) steering committee agreed to some basic operating procedures including voting for items by consensus vote and agreeing to a form to submit focus/survey ideas and costs.

Our Lady of Bellefonte Hospital (Ashland, VA) established meeting locations that are conducive to travel for all participants is challenging. Steering committee members decided to rotate meeting locations each month and offer call-in and webinar options as necessary.

Phase 2: Design

Introduction

The goal of inclusive coordinated transportation planning is systemic change – long-term strategies and practices that are engrained in the fabric and culture of an organization.

Letting Goals Emerge

The theory of change that has guided the efforts of this ACL-funded Transit Planning 4 All project is that meaningful engagement of participants in the planning process will lead to the development of community and public transportation services that are responsive to the needs and preferences of users and potential users of such services. Specific service improvement goals should emerge in an inclusive planning process. Thus, inclusive transportation planning, while primarily concerned with increasing inclusivity, can improve transportation through expansion of current services, introduction of new services and/or more consumer-responsive services.

Define Success

It is important for the parties involved – participants, partners and staff – to reach consensus on an initiative's goals, think of success along a scale where the ultimate objective is one measure of success and interim milestones are recognized as significant achievements.

The viewpoints of all involved in the initiative, especially riders and potential transportation users, should be considered in defining success. Even if the ultimate goal of the initiative is not achieved, the engagement of diverse participants in the transportation

planning process and their commitment to continuing involvement are significant steps in inclusive coordinated transportation planning.

Realistic Expectations

Barriers to an inclusive transportation planning initiative's ultimate success are inevitable. No initiative perfectly unfolds the way planners imagined at the outset, so identifying potential barriers, especially those outside the control of the lead agency and key partners, is advisable. Be sure to identify reasonable expectations and interim milestones that can be pointed to as evidence of forward movement. These victories can keep participants and partners engaged.

Build trust and commitment so that participants and key partners understand that change may be slow and incremental, but that staying the course will lead to real improvements.

Celebrate Success Along the Way

In the middle of an initiative, success may seem far off. Having interim milestones in place enables partners and participants to recognize progress. Marking accomplishments and acknowledging hard work are critical for keeping everyone interested, building camaraderie and inspiring everyone to remain committed.

Examples from the Field

Greater Portland Council of Government (Portland, ME) set two goals:

- Identify systemic ways to actively and consistently include older adults, people with disabilities, and people of color in regional transportation planning and decision-making.
- Secure support for Inclusive Transportation Planning strategies from PACTS (Portland Area Comprehensive Transportation System) the region's Metropolitan Planning Organization.

Boulder County's (CO) Mobility for All Project had two sets of clearly stated goals that supported achievement of desired outcomes:

- Technology Education: Expand access to and use of smartphone-based transportation applications and empower volunteer ambassadors to work with participants to use the technology.
- Mountain Volunteer Driver Program: Build trust and capacity and create an Implementation Plan.

Phase 3: Implement

Introduction

Inclusive planning encompasses communication, outreach, and a variety of levels of participant engagement. Importantly, implementing inclusiveness involves connecting with those you serve.

Inviting Participation

Outreach activities, such as surveys, focus groups, and community meetings and involvement at events should elicit experiences and recommendations from a wide spectrum of transportation users and non-users. To whom should you reach out? Start with people with disabilities and older adults. Consider outreach to specific transportation-challenged populations in your region, such as veterans, low-wage workers, students, non-English speaking individuals, new immigrants, and refugees. Consider also whether there are groups within any population with particular pressing needs, such as people who are deaf or hard of hearing.

Equally important are activities that engage a smaller cadre of committed participants who form an advisory group/expert panel that meets regularly throughout the project and assumes leadership roles in the inclusive planning process.

Example from the Field

Early in their project, [Hopelink \(Redmond, WA\)](#) analyzed current stakeholders and established what groups are underrepresented on our Steering Committee. Representatives from these groups were contacted and invited to join.

Plan and Be Flexible

A timeline for activities is critical and should focus on moving the project forward to reach implementation benchmarks. Potential barriers may arise that slow progress, necessitate changes in activities, or even require a reassessment of the project goals.

Therefore, flexibility and realistic expectations should be built into the timeline.

- Recruiting focus group participants;
- Conducting focus groups and surveys to assess needs and strengths and identify gaps in services;
- Selecting advisory committee members; and
- Holding community meetings.

Examples from the Field

After some difficulty recruiting steering committee participants from diverse geographic locations, [Boulder County Mobility for All \(Boulder, CO\)](#) posted a recruitment flyer on the social media platform Nextdoor to target underrepresented geographic areas. They received 29 people contacts within 24 hours of posting the flyer.

[Neighborhood Network of Northern Nevada \(Reno, NV\)](#) held one of their steering committee meetings at a local coffee shop. Lyft vouchers were made available to participants who needed transportation to the meeting.

Our Lady of Bellefonte Hospital (Ashland, KY) held 9 focus groups in one month at locations where people with disabilities and older adults regularly visit in order to ensure representation from a diverse group of stakeholders, including caregivers.

Advisory Groups

As organizations and agencies move forward – relying on the findings of the baseline assessment – they may want to seek advice or guidance from an external advisory group, such as an advisory committee, steering committee or stakeholder group. This group should include diverse representation, including people with disabilities and older adults. Members of advisory groups should be familiar with, or be taught about, program operations (including constraints), government policies that impact transportation operations, the process for changing systems, and how long change might take. Critical timeframes for getting inclusive transportation planning done should be brought up too.

Education and open communication are critical to the success of inclusive planning. Here are eight tips for successful advisory boards:

1. Have a purpose
2. Recruit doubters
3. Leverage the network
4. Write it down
5. Time is money
6. Keep it intimate
7. Maximize value, and

8. Sustain communication

Examples from the Field

All Transit Planning 4 All grantees (2018-2020) were required to have steering committees. Grantees reported increasing levels of participation of people with disabilities and older adults.

In the second round of funding, with increasing numbers of individuals participating in the planning and implementation process, participants reported an increasing satisfaction with the process.

Accessibility

Critical to establishing an advisory group is ensuring that all meetings, communications, and other forums – whether in person or virtual – are accessible. For example, it is important to hold meetings and public forums in places that people that use wheelchairs or seniors with mobility difficulties can access. When announcements about meetings are made, meeting planners should ask if those who will attend the meeting have any accessibility needs, such as interpreters, particular climate needs, or dietary considerations. Make sure that all advisory group members have reliable means of transportation and that accessible transportation options are available for anyone who needs it.

Examples from the Field

- [Hopelink \(Redmond, WA\)](#) produced an initial document that included a summary of best practices for ensuring inclusivity in meetings and information sharing, and committed to updating the document throughout their grant to serve as a resource after the grant ended.
- [Boulder County Mobility for All's \(Boulder, CO\)](#) Steering Committee members identified the need to do in-person surveying at locations already serving low-income individuals. Participants identified the need for paper surveys, Spanish language surveys, and information about the survey that people can take with them take the survey at home.
- To ensure diversity in distributing surveys to the community targeting seniors and people with disabilities, [Oregon Cascades West Council of Governments](#) used a diverse approach to data collection, including:
 - Tabling at community centers/libraries/grocery stores in rural areas
 - Provide online version of survey
 - Working with partners to share paper and online surveys with their networks
 - Public transportation outreach in buses at transportation hubs
 - Including a paper survey with delivered Meals on Wheels.
- [Neighborhood Network of Northern Nevada \(Reno, NV\)](#) reached out to all grant participants and stakeholders with a link and paper copies of their Inclusive Transit Planning survey. All organizations and participants were asked to distribute the link (or paper copy) to their constituents and/or people they know who are caregivers, people with disabilities, or older adults.

- To meet community needs for transportation services to Boulder County Mobility for All Summits, Hopelink (Redmond, WA) created a handout with details on how to venues via public transit. They included a contact phone number and e-mail address for people to contact if they have any issues getting to Summits and provided trip planning.
- [People for People's \(Yakima, WA\)](#) steering committee identified that technology to support the hearing-impaired should be available and descriptive language used so that those that are blind can participate in meetings. Committee members volunteered to attend meetings where feedback was being collected to assist persons who needed assistance with filling out surveys.
- [Hopelink \(Redmond, WA\)](#) experienced a language barrier issue when gathering responses for meeting satisfaction surveys. Instead of using an English 5-point scale, they switched to a smiley-face scale, with five different levels of happiness with the intent of eliminating confusion for limited English proficiency respondents.
- Maryland Department of Transportation (Baltimore, MD) Steering Committee members discussed the need for alternative ways to display or demonstrate materials after ongoing discussions and review of the tactile Braille flipbooks that were an important catalyst to discussing other methods or media for all users.

Learning from Each Other

Participants and partners each come to the table with their own perspectives; however, everyone does not know the same things. Taking time to learn from each other is critically important.

Learning, in terms of inclusive planning, means listening to – and learning from – others. Inclusive transportation planning is designed to emerge from real-life experiences. It takes on different characteristics, depending on the community, its history and what the participants in the process – people with disabilities, older adults, community stakeholders, local government, transportation providers, key partners, etc. – expect and want to see happen. True inclusive planning is based on participant engagement and leadership. Professionals and participants alike must approach inclusive planning with openness to learning from others.

Understanding constraints and political processes at the outset can help all participants identify realistic goals and objectives while still working for broader systems change over a longer period.

Examples from the Field

The [Greater Portland Council of Governments' steering committee \(Portland, ME\)](#) included an overview of inclusive transportation planning practices by other planning organizations and discussed which practices participants would like to see their project adopt.

[Milwaukee County Department on Aging \(Milwaukee, WI\)](#) discovered a "happy challenge" in finding ways to address different concerns/priorities at a round table conference. There were many different perspectives on the steering committee, and many different goals for the conference. Through discussions, they were able to focus the conference while addressing diverse needs and concerns.

Who Should Be Heard or at the Table

An inclusive planning program design must be based on input and guidance obtained from local coordinated transportation partners and both older adults and people with disabilities who are either users or potential users of community transportation services. Such partnerships should include public transit, and aging and disability organizations. A broader spectrum of partners will include health or human services organizations, groups that focus on transportation or the built environment, faith-based organizations, political leaders, schools, healthcare institutions, economic development entities, and businesses. It may also include representatives of other transportation-challenged populations in your region, such as veterans, low-wage workers, students, non-English speaking individuals, new immigrants, and refugees.

It is highly recommended to be active to ensure that government officials and political leaders are at the table. At a minimum, keep these leaders apprised of the work being undertaken in the inclusive planning initiative.

The AAA1-B project sought the advice and counsel of people with disabilities and older adults in the field from the outset by linking with external organizations, such as the Harriet J. Tubman Foundation. This external entity is a well-established, well-respected community organization already linked to the area's developing regional transit authority (RTA). The project determined the RTA to be a critical infrastructure in improving the region's transportation service, and it was important that the voices of people with disabilities and older adults inform the development of the RTA.

Example from the Field

[Milwaukee County Department on Aging \(Milwaukee, WI\)](#) steering committee members reached out to their networks to make sure that everyone in the community would be represented for a community discussion. Members were very dedicated to the idea that community discussions should have riders represented and worked to identify people who have never participated in advocacy. The Steering Committee also sought to include policy makers and elected officials.

Communication and Social Media Tools

Ordinary communication tools and social media can be used to support efforts to engage seniors and people with disabilities in inclusive coordinated transportation planning.

In the Transit Planning 4 All projects, email was primarily used to notify participants of upcoming advisory group meetings and to keep members apprised of developments. Beyond the usual social media venues of Facebook and Twitter for distributing information broadly, grantees tapped a number of different social media outlets.

Examples from the Field

[Easterseals of Massachusetts \(Worcester, MA\)](#) created a website on fee-free Google Sites, and planned to use this site and Facebook into the future to reach participants, partners, and stakeholders.

[Neighborhood Network of Northern Nevada \(Reno, NV\)](#) created social media graphics and event pages on their website and use social media to promote steering committee meetings and broader community inclusion.

[People for People \(Yakima, WA\)](#) used a widespread media approach to promote a survey focused on improving transit services, including:

- Survey email “blast” about the project with a link to the survey.
- On-Line display advertising that is region-focused, with ads in English and Spanish.
- Radio ads for both English and Spanish radio stations.
- Print advertisements for buses.
- Video showing the need for services and explaining the process used.

Phase 4: Evaluate

Introduction

The following activities are necessary to measure performance and evaluate inclusive transportation planning efforts.

- Have a Baseline: First Assess the State of Inclusion
- Establish Performance Measures
- Create a Model to Logically Link Activities with Results
- Track Inclusive Performance Over Time
- Analyze
- Sustainability: Knowing When You Are There

Let's look at each one in more detail.

Have a Baseline: First Assess the Status of Inclusion

One of the keys to evaluation is to see it as a continuous process that begins before new inclusive transportation planning efforts start. It is therefore useful to collect baseline data as you begin. This is how you will know where exactly you are starting. Visit the Start section, above, of the toolkit webpage for details about this critical step.

Establish Performance Measures

An inclusive strategic planning approach starts with setting goals, establishing objectives, deciding what performance to measure, collecting existing data, and determining the activities to conduct based on the collectively identified goals and objectives. Put in place a strategic plan that can be occasionally revised and that will set your inclusive transportation-planning project in a realistic and achievable direction. Involving participants and partners will enhance your ability to communicate about your work.

Components of a Performance Measurement System

Goals

These are a broad statement of the purpose of an initiative. They may take several years to achieve.

Objectives

These are incremental signs of progress towards the established goal. Make sure that objectives are specific and measurable. Measurable means that quantitative measures of progress in achieving the objective can be established. For example, measuring the percentage increase in the number of participants actively involved in inclusive transportation planning is a typical quantitative measure of progress. Qualitative measures such as measures of participant or partner satisfaction may also be

acceptable, but should be summarized so results can be reported as a number, for example the percentage of participants who indicated a process was inclusive.

Activities

These answer the question, what will we do? Activities must align with the identified goals and objectives and must be realistic given the resources available (funding, staff, volunteers). The desire to change the world can often lead to unreasonable expectations, so an occasional reality check during the process is useful.

Inputs

What resources are being used? Inputs identify the funding, staff resources, volunteers and in-kind resources used to as part of the inclusive coordinated transportation-planning project.

Outputs

What will the activities produce? Typical outputs for inclusive transportation planning projects include the number of participants serving on advisory committees, number of partnering organizations and number of planning meetings held.

Outcomes

Provide numerical information documenting progress towards achieving project objectives and goals. The key question with an outcome is, how will conditions change as a result of the activities we are conducting? The link between program activities and outcomes observed can be complex and may be influenced by many things, so it is important to understand these linkages and to be realistic about the extent to which activities are responsible for changes being observed. Outcomes specific to inclusive planning practices include the number of participants assuming leadership roles, the percentage of participant transportation issues addressed or resolved, or the number of transportation improvements implemented. In the long run, one would hope to see more trips by the members of your target population[s] and higher quality transportation services.

Impacts

In the long run, what difference do you want to make in your community, or in the lives of people affected by your program initiatives? If your program can be sustained, the outcomes that your program is achieving on a regular basis will hopefully result in improvements for participants, partnering organizations and your community.

Customer Satisfaction

Measures should go beyond whether participants and partners are happy or satisfied. These measures are an opportunity to understand, what do participants and partners think? Examples of measures include participant satisfaction with the planning process, stakeholder/partner satisfaction with the planning process, percent of participants who felt their opinions had an impact and the percent of participants who were highly satisfied with leadership opportunities.

Targets

These are quantitative estimates of what will be accomplished by your project within a specific time period, typically a year. Longer-term target setting is great as long as the target is realistic and monitored regularly. Targets should be determined based on prior experience, such as a baseline measurement before activities started against which progress would be compared. Targets (as opposed to goals and objectives) must be quantitative measures of progress.

Records

It is critical to keep a written record of the goals, objectives, activities and performance measures. Don't try to measure everything! Select measures that are meaningful for communication, decision-making and accountability. Measurement data should be collected regularly using a consistent, objective process that prevents reporting distorted or biased results. The key is to describe an objective method that someone else could use or audit to arrive at the same results. Reporting records should be openly shared with participants, partners and funding agencies.

Make note of conditions and issues that may have positively or negatively affected progress towards targets. A strategic inclusive transportation plan that is widely distributed and subjected to feedback will provide the framework for the work and a record of what you hope to accomplish.

Create a Model to Logically Link Activities with Results

A model is a great tool for communicating what your inclusive transportation partnership is trying to accomplish. The logic model links resources (inputs) to activities (what are you doing with the resources) to what you are producing (outputs) and to what you are accomplishing (outcomes). The logic model also will help you be precise in selecting relevant, useful performance measures. The W.K. Kellogg Foundation has some excellent resources on logic models. The Logic Model Development Guide does a nice job of explaining the relationship between different elements of a logic model.

In a logic model, one element is expected to lead to the next element in sequence. Logic charts are often used. Use arrows or other visual links to specific activities, outputs, and outcomes. Logic models often include a list of potential performance measures. Logic models may not be as effective in laying out the sequence of events that will lead to the changes your initiative envisions.

Monitoring Perceptions

In dealing with the diverse stakeholders represented in most inclusive transportation planning projects, attitudes and perceptions are important considerations. While producing outcomes is important, it can be a long-term process. Oftentimes, monitoring the perceptions of stakeholders to provide continuous information and feedback is the key to sustaining longer-term activities to change attitudes and improve services.

For example, simply asking if people with disabilities and older adults are satisfied with inclusion may be insufficient. It is critical to ask these stakeholders if others seek out their opinions and feedback

and whether they feel that they are being heard. Collecting feedback is not just the right thing to do, but also a critical step in the inclusion process.

Track Inclusive Performance Over Time

1. Set up a system to collect objective data. You'll want to routinely and regularly collect measurement data. If you develop a survey to collect feedback on inclusiveness, use it regularly, such as at steering committee and other meetings attended by people with disabilities and older adults.
2. Monitor results regularly. Regular monitoring, supported by detailed data collection, will help you see when things are going well, and when some of your project activities might need some attention to improve performance.
3. Track both inclusiveness as well as program results. Inclusiveness is a means to improving performance, not just an end in and of itself. Continuously monitor your inclusive activities. Share the results with stakeholders to let people with disabilities and older adults know that you care about their involvement.
4. Investigate irregularities in your results. Things don't always go as you expect. If you get unexpected results when regularly collecting performance measures, look into it. Performance measurement produces regular feedback. Be sure to use the feedback to monitor programs and make decisions.

On a regular basis (quarterly or annually), consider the trends in your performance measures, and if appropriate, revise your approach. If you are greatly exceeding your targets, or having trouble reaching the targets, the problem may be target setting, not the results. Consider revising your targets, but don't do it so often that the targets become meaningless.

Analyze

Analysis helps you assess if you're doing the right things and doing them well. Analysis of performance data supports management decision-making. Such analysis can lead to the modification of policies, operational procedures, and processes. An added benefit is that the evaluation process will help you prove to others that you're doing the right things and doing them well.

Periodically assess performance, measure progress to determine the achievement of goals and objectives, and to consider future actions. Be sure to identify reasonable expectations and interim milestones that can be pointed to as evidence of forward movement. These victories, often, will keep participants and partners engaged.

Agencies – at the state or local levels – may want to develop a system of collecting data regarding inclusive coordinated transportation planning practice that can be used by organizations as a self-scoring tool, or, at the state level, as a mechanism to enable organizations to compare themselves with each other.

Examples from the Field

[Hopelink \(Redmond, WA\)](#) established a process to continuously evaluate stakeholder participation and identify underrepresented.

[People for People \(Yakima, WA\)](#) built evaluation into sustainability plans to:

- Determine current level of inclusive transportation planning in South Yakima County and how to improve it.
- Continuously evaluate the public outreach process for successful participation of the target populations.
- Evaluate how to sustain involvement of target populations.
- Endorse and advocate project decisions and assist with fund raising.

[Greater Portland Council of Governments \(Portland, ME\)](#) developed draft recommendations using feedback collected at three months of steering committee meetings and focus groups.

Phase 5: Sustain

Introduction

Inclusive coordinated transportation planning is not a one-time phenomenon. Rather, it is a sustained and deliberate set of practices as well as a philosophical shift within an organization to include people with disabilities and older adults in every facet of the organization – often in ways that enable their perspectives to influence transportation services.

When inclusive coordinated transportation planning is sustained, people with disabilities and older adults play important roles in planning, implementation and operational decisions. When inclusive practices are embedded in an organization, when a cultural shift occurs, inclusive practices become an everyday part of organizational systems and processes. Ultimately, transportation services for people with disabilities and older adults are improved because the needs of diverse riders are considered.

This page focuses on the institutional aspects of planning, implementing and continuing positive changes as you sustain your efforts.

Plan

When it comes to implementing an inclusive coordinated transportation planning initiative the importance of planning cannot be overstated. The Transit Planning 4 All projects used customized strategies to develop and implement inclusive coordinated transportation planning. Common themes emerged from their work.

The factors that need to be recognized in any organizational plan to begin, implement and sustain inclusive coordinated transportation planning include:

- ⇒ Level of interest of community participants,
- ⇒ Level of funding to implement recommended changes,
- ⇒ Level of local support,
- ⇒ System capacity to absorb change and growth, and
- ⇒ External factors that may mediate program results.

A comprehensive plan will assist an organization. If organizations are thoughtful in planning, and systematic in implementation, an inclusive culture with the active and vibrant participation of people with disabilities and older adults, can be sustained.

Examples from the Field

Early in their grant, [People for People \(Yakima, WA\)](#) set up a process to ensure that the project would be sustained. The process:

- Determined current level of inclusive transportation planning in South Yakima County and how to improve it.
- Continuously evaluated the public outreach process for successful participation of the target populations.
- Evaluated how to sustain involvement of target populations.
- Endorsed and advocated project decisions and assisted with fund raising.

At their final steering committee meeting, [Hopelink \(King County, WA\)](#) steering committee members brainstormed projects for an action plan. Their draft action plan was a key in guiding future project phases to sustain inclusive practices.

Plan for Challenges

The Transit Planning 4 All project defines outcomes as specific measures of a program’s impact or results that can specifically and logically be attributed to the program. The pilot projects paint a picture of incremental achievement. At the end of two years, none of the grantees had created a fully inclusive coordinated transportation system or completely achieved their ambitious goals to improve transportation in their communities. However, each was able to identify specific changes in the community that showed progress along the way to realizing the full benefits of inclusive transportation planning and ensuring that inclusive processes become the norm in transportation planning, service delivery and oversight.

Budget

Inclusive coordinated transportation planning, implementation, and sustaining require commitment and funding. The lead agency will need to dedicate funding and staff resources to the effort in order for it to succeed. The amount of funding necessary will vary depending on the amount of work and the willingness and commitment of other organizations to provide staff and in-kind support to the initiative.

Budgets must consider preliminary work, including collecting data, conducting surveys or convening focus groups. Other issues that typically impact budget include: The need for an outreach campaign to reach specific population groups; whether there already is a functioning and willing advisory group with the potential to be expanded and empowered to conduct inclusive planning; the need to develop print materials to educate older adults and people with disabilities about current transportation options; and the desire to invest in technology to develop a more engaging website, a one-call/one-click resource center, or other communication vehicles. The need to consider sustainability of the effort from the outset cannot be over-stated and requires local commitment and ongoing efforts of participants and partners.

Example from the Field

[Hopelink \(King County, WA\)](#) noted that working within a budget could sometime hinder inclusiveness. They noted limits on the amount of incentives, translations, and services such as transportation. Many

grantees turned to partners to provide in-kind services to support inclusion and achievement of project goals. Hopelink worked with outside partners to identify lists to request CART, ASL, and translation services, and planned to continue using those resources after the grant to ensure sustainability of inclusion.

Lead Staff, Consultants, and Partners

There is no magic formula for determining the amount of staff resources needed to undertake inclusive coordinated transportation planning. The seven demonstration projects typically identified a project director who oversaw all activities and was responsible for reporting and managing consultants. The project director was not a full-time position for every project and the degree of day-to-day management and activity varied. Sponsoring agencies of the seven projects often provided staff support for additional management and guidance.

Dedicated Staff Resources

The seven inclusive coordinated transportation planning demonstration projects dedicated a percentage of labor to assure that the activities underlying their goal of inclusive coordinated planning were achieved. Sufficient staff time should be in place to devote to implementing project activities. Many projects hired qualified staff with expertise in diverse populations.

Timelines were established, continuous improvement processes were implemented and interest in creating inclusive practices became part of the mission and purpose of the organizations involved.

Examples from the Field

Boulder County (CO) hired a consultant experience working with a major mobility services company and as a transportation consultant to help develop their volunteer driver program.

Greater Portland Council of Governments (Portland, ME) hired a consultant to help develop an Inclusive Planning Toolkit. The consultant was fully involved in the grant project, including recruiting participants and attending the Transit Planning 4 All Grant Kick-off at the beginning of Year 2 of the grants.

Hopelink (Bellevue, WA) used a technology consultant to help develop a One-Call/One-Click Business Plan.

Responsibilities of Partners and Participants

The responsibilities that partner organizations and participants assumed in the demonstration projects varied. These included:

- ⇒ Planners and conveners of focus groups;
- ⇒ Reviewers and advisors of proposed transportation regulations, transit accessibility, etc.;
- ⇒ Presenters at forums and community meetings both large and small;
- ⇒ Decision-makers and developers of recommendations;

- ⇒ Relationship-builders with various community groups; and,
- ⇒ Participants in riders' groups.

In the Transit Planning 4 All projects, partners and participants proposed creative ideas, shared information in groups and individually, served as cheerleaders for project accomplishments, and sought new opportunities and partners. The bottom line is that participants took on the roles they needed to play, rose to the challenges, and contributed countless hours of time, energy and hard work to the seven demonstration projects.

Institutional Commitment

From the outset, the leadership and commitment of a lead/sponsoring agency – whether a transit agency or an organization supporting older adults or people with disabilities – is crucial to success. In order for inclusive transportation planning to be adopted as normal practice, support and commitment must come from the top and not be confined solely to the individuals or the management unit that is engaged in the initiative. Do not underestimate the impact of efforts to help agency leaders understand the importance of the project and see the potential benefits of inclusive planning for other agency priorities.

Make the case for inclusive planning by educating agency leadership, other staff within the organization, agency partners, political leaders, and involved older adults and people with disabilities and their representatives about the potential benefits of inclusive planning. Strategic briefings should be convened periodically to report on the initiative's accomplishments. Data from the project and illuminating anecdotes should be conveyed and connections made between the work of the project and other agency priorities.

Internal Considerations

An organization's characteristics, systems and policies influence inclusive practices. Recruitment, hiring, and professional development are important opportunities to integrate inclusive practices into an organization's work. Planning and implementing inclusive coordinated transportation planning are great opportunities for administrators to review job descriptions, examine their recruitment resources and review their interview processes.

- Ensure that recruitment and hiring practices are inclusive. Use accessible outreach efforts, such as communication materials that are available in alternate formats.
- Contact organizations with which people with disabilities and older adults are familiar as a way to diversify the range of applicants for recruiting and hiring.
- Provide ongoing professional development. Professional development should focus on the value of inclusive coordinated transportation planning to the transit provider and especially to the system upon which riders with disabilities and older adults rely. Employees in a workplace may or may not have experience in interacting with people with disabilities or older adults. Offering professional development regarding topics such as disability etiquette, communications with people with older adults, understanding specific disabilities and assistive

technology helps employees feel more comfortable with colleagues with disabilities or older adults, and also facilitate their comfort in outreach, recruiting and hiring.

- Employ accessible technology tools for planning, communicating and administering services.

External Considerations

As organizational personnel develop and implement strategies to implement inclusive coordinated transportation planning, it is important to consider what is going on outside of the organization.

External considerations may include:

- The political context and priority focus of particular local organizations and governing bodies.
- Laws, regulations, and local funding initiatives.
- Mechanisms to both garner support and win visibility from external organizations.

Activities should be designed to help move an initiative toward its major goal(s). The Transit Planning 4 All project includes seven local inclusive transportation planning demonstration projects, each with unique goals and activities that reflect their regional circumstances.

Open communication with agency leadership is a must, particularly when things are not going as planned. Sometimes transportation improvements don't happen on an anticipated timetable or hoped for improvements otherwise fail to meet the expectations of participants for rapid change. In an inclusive process, the key is to maintain engagement for the long haul.

Digital Tools

Technology is a means to an end, a facilitator of communication and information. For example, one-call/one-click transportation resource center technology offers information on community and public transportation options and enables on-line scheduling of rides. Automated call systems notify riders that a ride is on the way and improve the rider's experience. Equipment, such as wheelchair lifts and ramps, kneeling buses, and portable ramps, deliver accessibility.

Many regions are developing applications that increase the accessibility of transportation information or impact how rides are provided to seniors and people with disabilities.

Example from the Field

Boulder County's (CO) Mobility for All focused on assisting participants with technology one of its project outcomes. Eighty participants felt comfortable using transportation technology applications, and 17 ambassadors were trained to assist others.

Maintain Commitment

When inclusive coordinated transportation planning is sustained, people with disabilities and older adults play lead roles in planning, implementation and operational decisions. When inclusive practices

are embedded in an organization, when a cultural shift occurs, inclusive practices become an everyday part of organizational systems and processes.

When transportation officials create a welcome environment and specific channels for the perspectives of people with disabilities and older adults to be heard and acted on, sustainable inclusive practices inevitably follow. When an organization perseveres to assure that a philosophy and practice of inclusive coordinated transportation planning is in place, when it continuously assesses and modifies its approach, and when it adapts and reacts to changes in external and internal organizational factors, inclusiveness will be sustained.

Sustainability necessitates a commitment with a long-term view of inclusion.

Fostering Commitment

The desired end product of an inclusive process is the embedding of the perspectives of diverse populations in the design and delivery of transportation operations – over time, consistently and deliberately. Sustainability implies an implementation mentality – that the system and culture are changed. It necessitates that the changes leading to sustained activity are personal, that the perceptions and feelings of those involved are affected.

Stakeholders – both inside and outside of an organization – and partner organizations must be committed to the spirit and practice of inclusive coordinated transportation planning. Commitment comes from being knowledgeable about a particular topic, and understanding its impact on either personal or organizational practice, or both. This means that it is necessary for organizational administrators to educate staff through high-quality education and professional development with periodic refreshers, to assure that employees, volunteers and other internal stakeholders are current in their knowledge of inclusive practice.

Organizations will want to provide staff with materials on an ongoing basis, such as those available through the Transit Planning 4 All website, that will educate personnel on topics and legislation important to inclusion. For instance, the Americans with Disabilities Act, with its civil rights protections for people with disabilities or the Older Americans Act that provides safeguards for seniors, are key policy statements that outline services and practices for people with disabilities and older adults. More recently, the Workforce Investment Opportunity Act (WIOA) requires practices that promote competitive integrated employment – or, inclusive workplaces.

Examples from the Field

[Greater Portland Council of Governments \(Portland, ME\)](#) used an inclusive process to develop an Inclusive Transportation Planning Toolkit. The Portland Area Comprehensive Transportation System (PACTS), the region's Metropolitan Planning Organization, is requiring use of the Toolkit by staff and consultants. The Toolkit was shared with PACTS committee members and other stakeholders in 30 municipalities, demonstrating the widespread outcome resulting from an inclusive process.

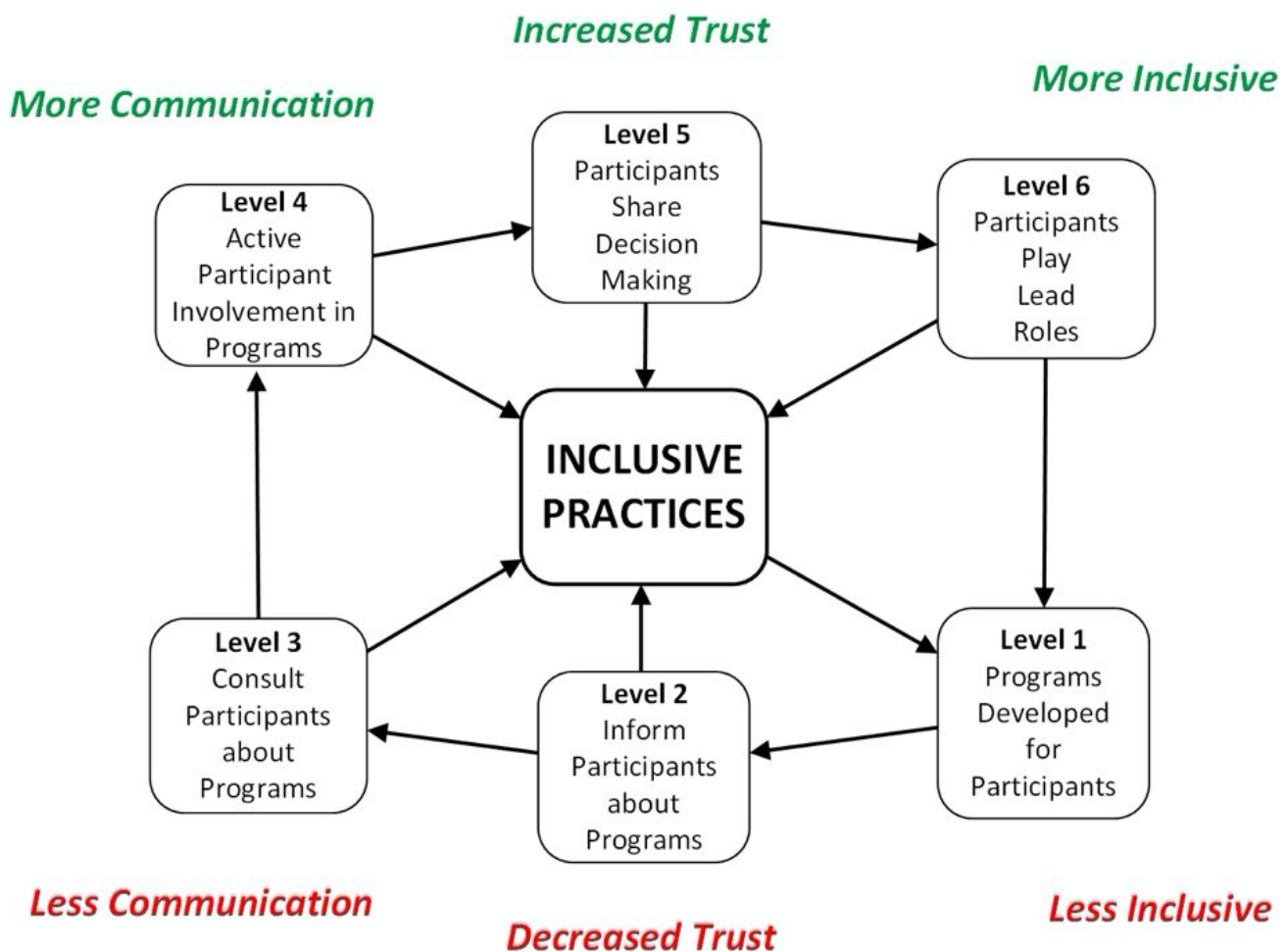
In order to respond to lack of engagement, outreach, and cohesion around inclusive engagement, [Hopelink \(Bellevue, WA\)](#) set a goal to create a local resource that contains best practices for engaging special needs populations in transportation planning, including people with disabilities, limited English proficient populations, immigrants and refugees, older adults, and caregivers. Hopelink used an inclusive process to produce an Inclusive Planning Toolkit to be referenced and distributed across King County and beyond.

[Neighborhood Network of Northern Nevada \(Reno, NV\)](#) used a human centered design approach to address five goals, each of which had separate steering committees. The extent of inclusion was rated separately for each goal, with final overall ratings of Level 4 to Level 6, as rated by participants.

The Pathway to Inclusion

The Pathway to Inclusion is a graphic tool that organizations can use to distinguish between the types of active and meaningful inclusive activities in their programs and their communities. Through inclusive discussions with program participants (see Definitions), partners, and stakeholders using the Pathway, organizations can conduct balanced, well-informed, consistent reviews to determine a projects overall placement on the Pathway at specific time intervals (quarterly). The purpose of inclusive activities is to lead to improvements in program planning, operations and services, as shown at the top of the Pathway.

PATHWAY TO INCLUSION



The Pathway to Inclusion includes 6 levels:

Level 1: Programs Developed for Participants – Little or no involvement of participants. Few programs are ever at Level 1, but without programs developed for participants, there is no need for additional inclusion. Level 1 is a context, and it is unlikely that any program will succeed without some participant inclusion.

Level 2: Inform Participants About Programs – Programs provide information to current and potential participants about programs. At this level communication is generally one-way (from program to participant).

Level 3: Consult Participants about Programs – Programs engage in individual or group discussions or data collections (surveys, focus groups, community meetings) to collect information from participants about current services, unmet needs, and potential services.

Level 4: Active Participant Involvement in Programs – Participants, through advisory, steering committees, or other activities play active roles in planning and program activities.

Level 5: Participants Share Decision Making – Participants share in the process of making decisions regarding planning and operations of programs.

Level 6: Participants Play Lead Roles – Individual participants who are not representing partner organizations but are current or potential program participants take on leadership roles in program planning and operations.

Generally speaking,

- Lower levels on the Pathway (Levels 1-3) have less communication, decreased trust, and are less inclusive.
- Higher levels of the Pathway (Levels 4-6) have more communication, increased trust, and more inclusive.
- The Pathway is a continuum, as demonstrated by the clockwise progression from lower levels of inclusion to higher levels. At any given period of time, programs are likely to be conducting activities that continue to be necessary for planning and operations, as is demonstrated by arrows leading from all levels except Level 1 to Inclusive Practices.
- The Pathway is not one way, since during a given period of time programs may or may not have examples of participant inclusion.
- For an organization to become more inclusive, it is likely that over time more and more examples of higher levels of inclusion will develop.

In order to maintain higher overall levels of inclusion, an effective inclusive program will be able to provide a number of examples of inclusive activities at different levels that cumulatively make the program more inclusive.

Resources about the Pathway to Inclusion

1. [Presentation](#) by Dr. Bernstein at the 2020 annual conference of the [American Evaluation Association](#). It presents lessons learned about inclusive planning involving people with disabilities, older adults, and caregivers.
2. [Presentation](#) by Dr. Bernstein at the [Transit Planning 4 All Forum](#) during the 2022 CTAA Expo in Louisville, Kentucky. Dr. Bernstein discusses the process of inclusive planning, the creation and evolution of the pathway and explores how and where planning activities land on the Pathway to Inclusion.

Transit Planning 4 All is a transportation planning project focused on promoting inclusive planning. TP4A is a partnership between the Administration for Community Living, the Community Transportation Association of America, USAging, the Institute for Community Inclusion at UMass Boston, and DJB Evaluation Consulting.

