

CHAPTER 7
TEACHING PASSENGERS
TO USE THE
FIXED-ROUTE SYSTEM —
TRAVEL TRAINING

CHAPTER 7: TEACHING PASSENGERS TO USE THE FIXED-ROUTE SYSTEM — TRAVEL TRAINING

INTRODUCTION

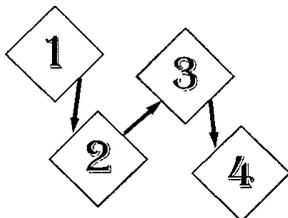
Transit systems are continually challenged to provide to all people, including those with disabilities, transit services that provide full access to all opportunities afforded by a community. To this end, transit systems must provide complementary paratransit to all people who cannot use fixed-route buses. Many people with disabilities, however, can use fixed-route buses for their travel needs, rather than complementary paratransit, if they receive travel training.

There are essentially four kinds of travel training — informational presentations, tailored travel training, peer model training, and general travel training. Informational presentations are given to groups of people likely to use paratransit or fixed-route services. With tailored travel training, a person with a disability is matched with a program of travel training specifically designed to satisfy the individual's travel needs. In peer model training, a person with a type of disability similar to that of the person being trained coaches that individual. In general travel training, the transit system provides general presentations, open to anyone in a community, that describe the transit system and how to use fixed-route transit.

This chapter details the steps needed to develop an effective travel training program. These steps are as follows:

1. Identify the need;
2. Define funding needs and resources;
3. Conduct public involvement;
4. Conduct market research;
5. Select training model and approach;
6. Develop travel training materials;
7. Implement approach; and
8. Evaluate the program.

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*Look at ADA
paratransit
eligibility
applications for
potential travel
training candidates.*

*Look at requests for
training and
information.*

STEP 1: IDENTIFY THE NEED

The first step is to identify the need for a travel training program. There are a number of sources of information, such as the ADA eligibility determination process, requests for information, and outreach activities.

ADA ELIGIBILITY PROCESS

Use the ADA paratransit eligibility process to identify the need for travel training and send information about travel training to potential candidates. Travel training information can be sent to all who apply for paratransit eligibility when blank applications are mailed to them. Receipt of travel training information can be a means of self-screening for the need for training.

Applications for ADA complementary paratransit service can include a clear explanation of travel training, a question about whether the applicant would be interested in it, and information about fixed-route service. Be sure to note that an interest in travel training will not affect whether or not the applicant is eligible for ADA complementary paratransit service.

Include travel training information in the notification of eligibility determination, whether or not the applicant is eligible for paratransit. In the early planning stages, the information may describe various travel training options and ask the applicant to indicate his or her preference.

Those people who are ineligible for ADA paratransit are potential travel training candidates. The eligibility determination process can be designed to also identify people who are not eligible for complementary ADA paratransit, but would be good candidates for travel training. Review these files to determine what type of travel training program can be established, and if the current program satisfies training needs.

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Determine how many times people with disabilities ask different types of questions about the system.

Establish a way to identify people with disabilities when they call.

The type of travel training needed can also be obtained by reviewing ADA eligibility applications. If most of the people are older, an informational presentation may be most appropriate. If most of the people in this database have vision impairments, travel training tailored to an individual may be most appropriate. If people come from an area of the city, where general knowledge of the transit system is limited, general travel training may be required. As the database of people ineligible for ADA paratransit expands, note demographic and location data that can be employed later.

INFORMATION REQUESTS

Requests for training, transit information, or travel planning assistance constitute another source of information. Categorize the types of questions asked by callers by working with those who receive information calls, on both paratransit and transit systems. Interviews with or surveys of call-takers can reveal trends in information requests.

Consider establishing procedures for keeping track of the reasons for calls. A simple form for checking question types can be used by call-takers. Figure 7-1 shows a possible form. Identify the most important questions related to possible travel training. Review the agendas and include them on the form. Call-takers simply check the form each time a question is asked. Review the forms at the end of a week or month to determine which questions are asked most frequently.

If particular questions are asked regularly, or with increasing frequency, it may signal the need for a particular type of travel training. Review the topics of the questions callers ask to be sure they are adequately covered in any travel training program. Consider establishing a way to identify callers with disabilities. It is not appropriate to ask people directly, and many will not answer accurately if asked directly, but the information may be revealed in conversation. The call-taker can also ask if the person needs a lift-equipped vehicle, which may indirectly identify riders who use wheelchairs.

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Call-Taker Name:	Date:	
Question	Check (✓) each time the question is asked	Count
How much is the fare?		
How do transfers work?		
What should I do to signal a bus?		
What is the procedure for boarding and disembarking in a wheelchair?		
How do I pay the fare, if I use a wheelchair lift in the back of the bus?		
How do I read a system map?		
How do I read a bus schedule?		
What types of discount fares are available for people with disabilities?		
Could someone help me plan a specific bus trip?		
Other questions:		

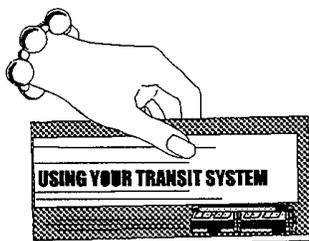
Figure 7-1. Call-Taker Question Form

OUTREACH ACTIVITIES

If schedules and transit information are mailed to people who request it over the telephone, a brief insert can be included describing planned or existing travel training. If the insert will be mailed to all people who request information, it can be general in nature. Figure 7-2 shows some possible wording for a travel training informational insert.

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Consider sending a brief insert with information mailings.



TRAVEL TRAINING FOR THE BUS

If you or someone you know has difficulty using the bus, because of

- a disability,
- advanced age,
- illness, or
- other reasons,

training is available at no cost to make using the bus easier.

Training will provide general information about the bus system, schedules and assistance in reading the schedules, trip planning information and tips, and information about the system's policies and procedures.

Specialized training for people with specific disabilities is also available.

For additional information, contact:

Ms. _____
Training Coordinator
City Transit System
123 Main Street
Righthere, WI 53000
Phone: _____
Fax: _____
TDD: _____

Thank you for riding the bus!

Figure 7-2. Possible Travel Training Informational Insert

In addition, assess information from other internal sources, such as bus operators and other transit professionals who come into contact with people with disabilities. Information may also be collected at meetings, in individual interviews, or through surveys. This information might consist of requests for information, indications that a new center for people with disabilities is about to be opened, or an indication that many similar questions are being

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asked of transit personnel. This information can help identify the need for a travel training program and the model that should be used.



Another approach is to develop a team of operators, call-takers, supervisors, and others, who can work to address several travel training issues. These issues may include whether travel training is needed, what types of training are needed, where the training should occur, and who should do the training. Gathering all of the transit system's experts in one room for a short time can produce excellent insights into these issues.

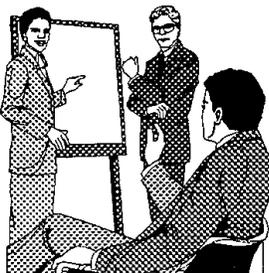
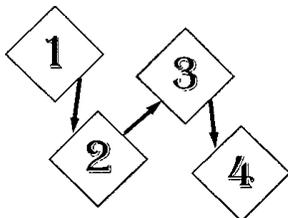


Explore forums (such as advisory committees, task forces, and public hearings and meetings) that enable the public to participate in decision-making. The various citizens' advisory committees can be a source of valuable information about how people in the broader community identify the need for travel training. Task forces may be organized to address particular service problems or the general travel needs of specific geographic areas. Elicit their opinions about a proposed travel training program. Add travel training to the agenda at public hearings, workshops, and consultation meetings.

Assess the value for travel training by evaluating progress in making the transit fleet accessible. Also assess the process of the city in installing physical improvements so fixed-route buses can be a viable alternative for people with disabilities. As the transit system becomes more accessible, travel training needs will change.

As an area becomes more accessible, more people will be able to get to their destinations by fixed-route rather than only paratransit. By strictly interpreting ADA paratransit eligibility, a transit system can create a large market for travel training, particularly if accessibility of various locations is used in the eligibility determination process.

From all of these sources, determine the absolute amount and type of travel training required. The next step involves an assessment of funding needs and resources.



STEP 2: DEFINE FUNDING NEEDS AND RESOURCES

TRAINING MODEL ALTERNATIVES

The four basic training models (informational presentations, tailored training, peer model training, and general travel training) each require different resources. Selecting the most appropriate model depends on various factors, including the extent of community and transit agency resources.

Informational Presentations

Informational presentations about the system and how to use it are made to groups in the community. Conduct presentations at sites where there are numerous potential patrons who may need information before they use the system. Possible locations include senior citizen residences, apartment complexes in which numerous people with disabilities reside, and activity centers frequented by senior citizens and people with disabilities. This general approach provides some training for participants, but does not address individual needs. The advantage is that information can be distributed widely, without requiring highly trained staff, particularly if a video is used as part of the presentation.

To determine the costs for an informational presentation approach, identify who will develop and make the presentations. Estimate how many presentations will be made and the amount of staff time involved. Volunteers from the community may be able to make some of the presentations, but staff time will be needed to identify trainees and sites and to schedule the presentations. Table 7-1 shows some of the components of a cost estimate. Chapter 5 of this Guidebook includes information on the development of a training video, much of which can be applicable to the development of an informational video for travel training.

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**Table 7-1. Informational Presentations Approach:
Cost Components**

Staff Time			
Presentation Development	Number of Hours	Hourly Cost	Total Cost
Identification and Scheduling	Number of Hours	Hourly Cost	Total Cost
Presentations	Number of Hours	Hourly Cost	Total Cost
Handouts			
Development	Number of Hours	Hourly Cost	Total Cost
Copying	Number of Copies	Cost per Copy	Total Cost
Travel Costs			
	Number of trips	Cost per Trip (bus fare, mileage rate, parking, taxi fare, etc.)	Total Cost
Audiovisual Materials			
Video Development	Development Time and Cost	Production Cost	Total Cost
Audiovisual Cassette Development	Development Time and Cost	Production Cost	Total Cost
Slide Presentation Development	Development Time and Cost	Production Cost	Total Cost
Total Cost of Informational Presentations			

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Tailored travel training is usually performed by an agency specializing in training people with disabilities in independent living skills.

Tailored Travel Training

In the second training model, a person with a disability is matched with a program of travel training specifically tailored to his or her travel needs. This work is usually performed by an agency specializing in training people with disabilities in the skills needed to live independently. Travel training is thus an outgrowth of an extensive intake process.

The components of a comprehensive, customer-oriented intake process are as follows:

- Determining the person's specific travel needs;
- Determining how much the person knows about the transit system;
- Determining if there are any specific disabilities that hinder the person's ability to travel; and
- Determining how independent the person is and how quickly he or she adjusts to new experiences.

The cost components of this model must be thoroughly examined. First, contact the local agencies and determine what resources they have available for use in travel training. Second, determine what resources are available for free as part of their current mission and how much additional services will cost if they are required by a transit training program. Third, assess the status of volunteers in coaching independent living skills. Determine how much staff coordination time will be required if this model is implemented. (Staff time may be required to publicize a travel training program, refer people to an outside agency, monitor the effectiveness of the agency, and/or provide a continuing resource to people who have been travel trained).

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Peer Model Training

The third technique is peer model training. In this technique, a person with a disability similar to that of the person being travel trained does the training. The peer performs most of the training and indicates how he or she personally deals with traveling by fixed-route transit. This training usually includes the peer accompanying the patron on a trip to ensure that the new patron is comfortable with the new situation.

In order to obtain the cost of a peer model training alternative, determine the availability of volunteers to do this training. Work with an oversight committee to determine the number of volunteers needed and to identify them. After sufficient volunteers are identified, determine whether the basic program should be developed in house, by a group of people with disabilities, or by some outside agency. Even if outside individuals develop and implement the program, someone on staff will spend some time coordinating travel training.

Develop formal arrangements with outside individuals involved in training. If a group of people with disabilities or an outside agency develops and implements peer model training, make specific arrangements or enter into a contract to establish what the group will do for the transit system and to allocate costs for the various components of the program.

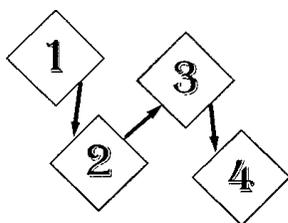


General Travel Training

The fourth alternative is general travel training. Often, travel training for the general population is valuable and may be critical in communities where there are many new people or where there is a sizable transient population, such as college towns. New people may be good candidates for transit but may not know how to use the system. Distribute fare schedules or a system map at meetings for those who need basic information about using the system.

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Review all potential resources in a community.



The general travel training alternative can be the least costly of the models. Costs include developing a presentation and handouts, advertising the meetings, and providing presentations.

AVAILABLE RESOURCES

Review all potential resources available in the community, including centers for independent living, services for people with visual impairments, paralyzed veterans organizations, rehabilitation hospitals, clinics, and organizations associated with particular diseases. Service organizations, such as the Kiwanis, Rotarians, Shriners, or Knights of Columbus, may be resources. These organizations may have existing programs into which travel training can be integrated and may be able to provide funding or volunteers for particular aspects of the training. With a complete inventory of potential community resources, and a set of understandings with different agencies, a program may be implemented for a modest sum.

Explore the availability of grants from state agencies and private sponsors. Determine whether the state departments of transportation, health, or social services have grants available to fund travel training. Private sponsors may be interested in helping underwrite the cost on a one-time or continuing basis. Such organizations as HMOs, insurance companies, or foundations might be approached as possible resources.

The final resource is monies allocated by the transit system itself. While there will be some costs for travel training, they may be partially or totally off set by the fact that more people will be able to use lower-cost fixed-route transit, rather than paratransit, to travel in a community.

STEP 3: CONDUCT PUBLIC INVOLVEMENT

In addition to other public involvement activities, establish an oversight committee. This group will be absolutely necessary to learn the specific travel training needs of people with disabilities in the community. This group may also provide volunteers to perform some of the training and develop some of the materials.

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Develop a citizens' oversight committee to help develop materials and implement the program.



OVERSIGHT COMMITTEE MEMBERS

Consider encouraging the following people to serve on an oversight committee:

- Transit users with disabilities;
- Bus operators, including bus operator trainers;
- Transit planners involved in disability issues;
- Agency professionals with knowledge of disabilities and their implications for bus travel;
- Mobility trainers for people with visual impairments;
- People who are geographically distributed throughout the transit service area; and
- People with disabilities who attend local universities.

This mix of transit providers and customers can provide the skills and awareness needed to develop a travel training program. In addition, working together will greatly increase understanding among the groups. Responsibilities may include project oversight, boarding time studies, surveys, field studies, bus demonstrations, public presentations, and evaluation of the program.

THE ROLE OF THE OVERSIGHT COMMITTEE

In any approach to travel training, continuing communication with the oversight committee is important. Have discussions with as many people with disabilities as possible — If only a few people with disabilities are involved, the needs of others may not be adequately expressed.

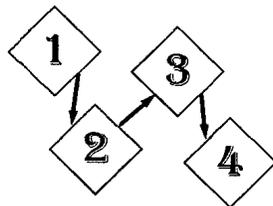
Involve the community as much as possible. For example, good communication with members of the community can assist in the following:

- Identifying peer trainers;
- Identifying locations for informational presentations;
- Identifying trainers for training tailored to individuals; and

Good communication is essential.



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- Contacting groups and individuals who would benefit from peer or transit system presentations.

Over time, community resources will become apparent, but make the initial contacts to start the process — it takes time to become aware of all the available services and people.

STEP 4: CONDUCT MARKET RESEARCH

After developing a method to involve the public in the design and implementation of a travel training program, augment the program by conducting market research to support the training models being considered for the transit system. If an informational presentation approach is used, market research may be necessary to either verify or correct impressions that people with disabilities may have about transit. If an independent living approach is being considered, interview people working for an independent living center. Ask them to identify the types of travel training a transit system can provide to assist the independent living agency in doing its work. If a general travel training approach is being considered, survey potential patrons to determine what topics should be addressed and when training should occur.

The approach requiring the greatest amount of market research is the informational presentation. In this technique, efforts are made to correct impressions about fixed-route transit that may prevent people with disabilities from using it.

Determine the factors which prevent people with disabilities from using fixed-route transit. Communicate with the oversight committee and anyone else identified by the committee who can provide information about the transportation needs and feelings of people with disabilities.

The major topics that will be brought up in these discussions are likely to focus on the following:

- Attitudes of passengers;
- Attitudes of bus operators; and
- Boarding time for a person using a wheelchair.

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*Perform those types
of market research
required by the
prospective travel
training alternative.*

The following market research approaches help identify whether the assumptions people with disabilities have regarding these issues are supported by research.

PASSENGER ATTITUDE SURVEY

To measure passenger attitudes, administer a short survey at some major transit stops, or mail the survey to a sample of transit users. At transit stops, make every effort to distribute it throughout the service day to ensure that a representative group of respondents is contacted. The survey should also be distributed in an organized fashion (for example, either given to everyone or to every second, third, fourth, or fifth individual waiting at the bus stop).

A survey can also be administered through the mail. Mailing lists might be available from monthly pass lists, from lists of names and addresses supplied in previous surveys, or from a list of people attending previous public hearings and meetings.

Questions that could be used in a survey to find out if transit patrons are concerned about the boarding times required by people who use wheelchairs are shown in Figure 7-3.

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Passengers are more likely to respond to a short survey.

<p>1. Have you ever observed a person in a wheelchair boarding a bus? _____ YES _____ NO</p> <p>2. If YES, how long do you think the boarding took? _____ Less than 1 Minute _____ Between 1 and 2 Minutes _____ Between 2 and 3 Minutes _____ Between 3 and 4 Minutes _____ Longer than 4 Minutes</p> <p>3. How would you rate your concern about the use of wheelchair lifts delaying bus schedules and operations? _____ Not Concerned _____ Somewhat Concerned _____ Very Concerned</p> <p>4. Have you ever given up your seat to a person with a disability or an elderly person? _____ YES _____ NO</p> <p>5. If you answered YES to question 4, how did you feel about being displaced? _____ Helpful _____ Awkward _____ Resentful _____ Angry _____ Does not apply-Have not had to give up my seat _____ Other _____ (Please Indicate)</p>

Figure 7-3 Passenger Attitude Survey Questions

Distribute the passenger attitude survey to as many people as possible.

Make an effort to distribute this survey to as many people as possible, so an accurate measure can be taken of how the transit patrons feel. If the survey is to be mailed back, be sure to follow up to ensure adequate response.



A bus operator attitude survey should be conducted as part of an operator sensitivity program.

Use survey results to find areas for additional training and to advertise driver skills.

BUS OPERATOR ATTITUDE SURVEY

Measure operator sensitivity through a survey administered prior to sensitivity training. This will help the instructors gauge the degree to which sensitivity training is necessary. A survey done prior to sensitivity training is likely to provide a better indication of sensitivity than a survey done afterward. After training, people may answer the questionnaire in a manner that management seeks, even though answers may not mirror the respondents' thoughts.

Doing a survey too close in time to a sensitivity class may produce false statements. Doing a survey at another time, such as mailing it out to all drivers or leaving it in their assignment boxes may solicit more honest responses. If people are not paid for the time they take to answer the survey, the response rate may be low. It is likely that drivers who have serious sensitivity problems will not answer the survey. Thus, it is probably best to administer a survey immediately prior to a compulsory sensitivity program, when they will be paid to answer the survey.

Some of the questions which could be asked by a survey of bus operators are in Figure 7-4.

Using the responses to the survey, determine whether particular areas require additional driver sensitivity training. Conduct surveys on a continuing basis, in order to assess whether or not additional sensitivity training is required. Share the survey results with the bus operators to impress upon them the importance of sensitivity to people with disabilities.

If the survey indicates a high degree of operator sensitivity and awareness, consider a publicity campaign, directed at people with disabilities, to advertise operator skills. This can be combined with other positive market research results.

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1. Do you personally know anyone with a disability?
- Yes
 - No
 - Not sure
2. How often do you have contact with people with disabilities?
- Daily
 - At least once a month
 - Less than once a month
 - Not sure
3. Is there any person with a disability whom you can call a close friend or relative?
- Yes
 - No
 - Not sure
4. Thinking about jobs, housing, transportation, and access to public places, how much discrimination do you think there is against people with disabilities overall?
- A great deal
 - Some
 - Not too much
 - None at all
 - Not sure
- 5a. Place an X next to anyone you know with a disability.
(Mark all that apply.)
- A coworker, supervisor, or employee
 - A patron who rides your bus
 - A neighbor
 - An employee in a local store, restaurant, or business
 - A friend
 - A child in the neighborhood
 - A member of your household
 - A relative in your household
 - Another relative (outside your immediate household)

Figure 7-4 Bus Operator Survey Questions

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5b. For each person you know with a disability, indicate whether you feel the relationship is generally pleasant and easy or is strained and uncomfortable due to his or her disability.

Pleasant and Easy	Strained and Uncomfortable	
_____	_____	A coworker, supervisor, or employee
_____	_____	A patron who rides your bus
_____	_____	A neighbor
_____	_____	An employee in a local store, restaurant, or business
_____	_____	A friend
_____	_____	A child in the neighborhood
_____	_____	A member of your household
_____	_____	A relative in your household
_____	_____	Another relative (outside your immediate household)

6. Many parking lots have spaces for drivers with disabilities. Do you think there are too many of these spaces, too few, or about the right number?

Too many
 Too few
 About right
 Not sure

7. Do you feel people with disabilities are discriminated against in the following circumstances?

Yes	No	
_____	_____	Equal pay for equal work
_____	_____	Equal opportunity in employment
_____	_____	Equal access to education
_____	_____	Equal access to public transportation
_____	_____	Equal access to public places like stores, restaurants, and places of worship
_____	_____	Equal access to theaters and sports events

Figure 7-4 Bus Operator Survey Questions (Continued)

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8. Do you think there is more or less discrimination against people with disabilities than there was 10 years ago?

- More
- Less
- Same
- Not sure

9. How long do you think it takes a wheelchair to board a bus?

- Less than 1 minute
- Between 1 and 2 minutes
- Between 2 and 3 minutes
- Between 3 and 4 minutes
- Between 4 and 6 minutes
- Between 6 and 8 minutes
- Between 8 and 10 minutes
- More than 10 minutes

10. When you encounter a person with a severe disability, how often do you feel the following emotions?

Often	Occasionally	Never	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Anger, because they cause inconvenience
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fear, Because you feel what's happened to them might happen to you
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Awkwardness or embarrassment, because you don't know how to behave with them
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Resentment, because they get special privileges
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pity, because of their situation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Lack of concern, because they can manage okay
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Admiration, because they overcome so much

Figure 7-4 Bus Operator Survey Questions (Continued)

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11. How do you feel when you're assigned a lift-equipped bus? (Check as many as is appropriate.)

- Angry, because operating the lift is a hassle
- Fearful, because you don't know how to deal with people with disabilities
- Awkward, because you're not familiar with lift operation
- Stressful, because you think a wheelchair boarding with put you behind schedule
- Neutral, because you're used to dealing with people with disabilities

12. Do you feel embarrassed or awkward because you don't know whether or not people with disabilities want you to help them?

- Yes
- No
- Not sure

Figure 7-4 Bus Operator Survey Questions (Concluded)

WHEELCHAIR BOARDING TIME STUDIES

An important issue, as people with disabilities increase their use of fixed-route transit, is the time it takes to board using a wheelchair and the impact on the schedule. Conduct research to measure the time it takes to board. This is particularly important after accessible vehicles have been in use for a period of time and when active efforts are being made to attract people with disabilities to fixed-route services. Follow the steps below for a boarding time study:

1. Select a set of bus routes where people using wheelchairs frequently board. This can generally be identified by collecting information from regular driver counts or through a brief survey of bus drivers.
2. Organize a group of volunteers or others to conduct the survey. The survey teams should include a person using a wheelchair and a person not using a wheelchair. Seek

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- volunteers from the travel training oversight committee, other advisory committees, staff, or particular client groups. Seek volunteers from among those using manual and powered wheelchairs and 3-wheel scooters.
3. Assign the survey teams to particular segments of the chosen bus route during specific trips, boarding at specific locations. The tests should be conducted at peak and at non-peak times.
 4. Issue each team a stopwatch to time boarding and deboarding times for people using wheelchairs. Boarding times should begin when the bus operator begins deploying the lift and should end when the operator returns to his or her seat after the wheelchair has been secured. Deboarding times should begin when the operator begins to undo the wheelchair securing straps/hooks and should end when the person is on the sidewalk.
 5. Record the entire time required to negotiate the allotted route segment. While they are doing this, perform boarding and alighting tests of persons using wheelchairs and record them on a form similar to the one displayed in Figure 7-5. Note on the form any circumstances that might hinder people boarding in wheelchairs. The more common comments might be summarized numerically as in Figure 7-5.
 6. During the same day of the week, during approximately the same weather conditions, record times over the same route segment to indicate how long it takes a bus to negotiate the route segment without wheelchair boardings or deboardings.

Perform analyses, using any standard statistical package to compute such information as the average boarding and deboarding times and the standard deviation. Two thirds of the boarding and deboarding times should be within one standard deviation. This information will determine the actual time that people using wheelchairs take to board fixed-route transit buses.

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BOARDING TIME SURVEY

SURVEYING TEAM _____

Route and Segment # _____

DATE _____

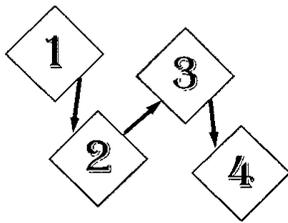
Trip Number	Bus Type	Boarding Location	Dir. (N,S, E,W)	Due to Arrive	Arrival Time	Board Time	Depart Time	Alighting Location	Due to Arrive	Arrival Time	Alight Time	Depart Time	Comments

COMMENTS

- | | |
|--|---------------------------------------|
| 1. Two wheelchair users boarded. | 2. Two wheelchair users alighted. |
| 3. Lift jammed at boarding location. | 4. Lift jammed at alighting location. |
| 5. Driver did not apply securement system. | 6. Bus type was not as indicated. |
| 7. Bus awaited transfer enroute. | 8. Unusual stop enroute (explain) |

Figure 7-5. Boarding Time Survey

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The preceding studies are by no means exclusive, but they do demonstrate the types of market research that can be used as a foundation for a travel training program. The research results will be particularly useful in the informational presentation or general travel training models. The information can help convince people that using fixed-route transportation is a viable transit alternative.

STEP 5: SELECT A TRAINING MODEL AND APPROACH

Select the travel training model and approach with as much input as possible from the oversight committee — their involvement is critical for the success of a travel training program, no matter what model is chosen.

Earlier discussion identified the basic travel training model alternatives available. These are as follows:

- Informational presentations;
- Training tailored to an individual;
- Peer model training; and
- General travel training.

Determining which model to use in travel training is a function of the needs of a community; the amount of market research work required; the availability of expertise, time, and funding at the transit system; and the availability of expertise, time, and funding in the community at large. Figure 7-6 summarizes the characteristics of the four travel training alternatives. Based upon the needs identified and the resources available to do travel training, identify a model. Then identify an approach for performing this model.

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Make a final determination of the travel training model alternative to be used in the community.

CHARACTERISTICS	TRAVEL TRAINING MODEL ALTERNATIVES			
	Informational Presentation	Tailored Travel Training	Peer Model Training	General Travel Training
Needs met	People with Disabilities, Elderly	People with Disabilities	People with Disabilities	People with Disabilities, Elderly, General Public
Amount of market research required	High	Low	Low	Low
Amount of transit system expertise required	Low	Low-High	Medium	Low
Amount of transit system time required	Low	Low-High	Low	Low
Amount of transit system funding required	Low	High	Low	Low
Amount of community expertise required	Low	High (Low, if program is already present)	Medium	Low
Amount of community time required	Low	High	Low	Low
Amount of community funding required	Low	High (Low if program is already present)	Low	Low

Figure 7-6. Characteristics of Travel Training Models

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Essentially four approaches can be used in travel training. The four are as follows:

- In house training;
- Referral system;
- Outside firm; and
- Peer-to-peer training.

Table 7-2 shows the most appropriate approaches for each of the training model alternatives. Informational presentations can be made by in-house staff, or members of the community can conduct them for their peers. Although in-house expertise may exist, training tailored to an individual is often best approached through an outside firm or organization, either through a contractual arrangement or on a referral basis. The peer model can be best implemented through referral to groups in the community and by special arrangements with them or through a peer-to-peer approach. General travel training can be conducted in house or through members of the community.

**Table 7-2. Most Appropriate Approaches For
Training Model Alternatives**

Approaches	Informational Presentations	Tailored Travel Training	Peer Model	General Travel Training
In-House Training	✓			✓
Referral System		✓	✓	
Outside Firm		✓		
Peer-to-Peer Training	✓		✓	✓

To do effective travel training, an organization should have expertise in some areas of the health and social sciences.

To accomplish effective travel training, an organization should have expertise in those portions of physical therapy, occupational therapy, and psychology which affect a person's decision to use one method of travel over another. While a few major transit systems may have hired people with this expertise to do ADA paratransit certification or other duties, they are not always present in house at most systems.

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In deciding upon a travel training approach, determine the role of volunteers.



Organizations that are part of the travel training oversight committee may have the needed expertise. They may supply training that can be integrated into a program. If this is the case, the transit system's role might be to organize a program to use these resources.

In deciding which travel training approach will be used, determine how volunteers can provide some of the resources needed by the program. In communities with a significant pool of volunteers, much of the travel training can be accomplished by them. This can save a transit system money. In communities without a ready pool of volunteers, an approach requiring significant personal interaction may be expensive.

The availability of funding and staff resources is important. Money may be available from internal transit system resources or from some type of external grant source. The amount of money will determine what type of program can be funded. Similarly, the staff resources that can be committed to a training program affect what type of program can be implemented. There may be expertise on hand to do travel training; however, consider how the commitment of staff time will affect other work areas.

IN-HOUSE TRAINING

To do travel training in house, identify staffing requirements. Develop presentations on general information about the transit system and the features buses have that can assist people with disabilities. General training should encompass how much the fare is, how to obtain transit timetables, how to read timetables, how to use the system map, and how and why one requests transfers when boarding buses.

If travel training is conducted in house, responsibilities for each of the training models vary. For informational presentations and general travel training, responsibilities include the following:

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For travel training done in house, transit system responsibilities will vary depending on the travel training model chosen.

- Development of materials;
- Production of materials, including handouts and audiovisual items;
- Identification of presentation sites;
- Scheduling and coordination of presentations;
- Identification and assignment of staff time for presentations and other tasks;
- Advertising; and
- Notification of presenters.

For training tailored to an individual, responsibilities include the following:

- Development of a tailored program, which may or may not be based on a standard program;
- Varying levels of coordination with outside agencies;
- Staff training and education;
- Identification and dedication of professional staff time;
- Identification of trainees;
- Scheduling and coordination of trainees and trainers; and
- Distribution of fare media or vouchers for training rides.

For peer model training, responsibilities include the following:

- Identification of an adequate pool of peers for training needs;
- Contractual, in-kind, or volunteer arrangements with peers;
- Identification of trainees;
- Scheduling and coordination of trainees and trainers; and
- Distribution of fare media or vouchers for training rides.

Determine, on the basis of available in house resources and staff, whether in-house training is the best approach. Conducting training in house offers control of the level, amount, and type of training provided. If the training provides considerable benefits — by moving people onto fixed-route services, by improving community relations, or by expanding the role and responsibilities of people with disabilities within the transit agency — the program may be expanded as resources allow.

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If travel training presentations are made at outlying locations, look for places that are convenient for trainees.

Some systems require all people who are determined eligible for ADA paratransit to go through a short course in using fixed-route. The purpose is to make everyone aware of the availability of fixed-route transit. Even if paratransit is the preferred method of travel, there may be occasions when fixed-route transit is an option. For example, when a person is traveling with a companion, fixed-route transit service may be preferred because of lower cost or greater convenience.

Be careful in selecting travel training presentation sites. Often, the easiest place for a presentation is on site. Unfortunately, transit terminals and even the transit system's general offices are sometimes difficult to reach.

Presentations made in outlying areas should be convenient for trainees. Travel training should also occur at convenient times and days of the week. Often a good option is Saturday morning or afternoon. Be sure the presentation site (particularly the rest rooms, entrances, stairwells, and elevators) is accessible to people with disabilities. The site should also be in a safe area.

REFERRAL SYSTEM

Another approach to travel training is the referral system. In this approach, system personnel do not do any training themselves, but refer candidates to experts in the community who perform travel training. Identify trainers who are experts in various areas, based on passenger disabilities and training requirements. Organizations which provide services to people with disabilities may identify trainers (for example, their staff members, people with disabilities with whom they work, or others in the community with whom they have contact). An organization for people with vision impairments, for example, may be equipped to train people in transit travel. Contact community organizations to identify training which already takes place and the sources of expertise. Arrange for referrals from the paratransit eligibility process or other procedures to the organizations that can provide training.

Develop a database with all of the gathered information to set up the referral system. The database should include any

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A database is an essential element of a referral system.



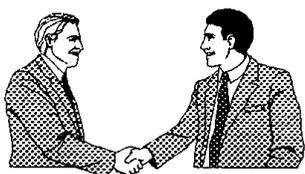
community resources that can assist a person desiring travel training. This database should include the following:

- The name of the agency,
- Areas of expertise (travel training skills),
- The names of the people the agency will serve,
- The names of contact people,
- Geographic area, and
- Date of information.

This information is typically available from large umbrella organizations such as the United Way. Telephone the various appropriate agencies to identify points of contact and willingness to cooperate with a transit agency in a program of travel training. The oversight committee is also a valuable resource. Members should be consulted to obtain referral information prior to any major data-gathering activity.

Although this approach does not require much involvement of in-house transit system staff, it is still necessary for someone sensitive to the needs of people with disabilities to make the referrals at the transit system. This person should understand and be able to take the initiative to acquire additional resources if a special need arises.

OUTSIDE FIRM



To hire an outside firm to do travel training, develop an RFP. Set up a committee, to develop the RFP, composed of transit system staff members and people with disabilities. While the RFP should include all of the basic contractual RFP components, include these additional items:

- Discussion of the definition of travel training;
- An indication of the types of disabilities that will require travel training;
- An indication of the type and amount of effort that will be required to do travel training;
- A requirement that the proposers indicate their approach to travel training;
- A requirement for a clear statement indicating the expertise the proposer has to do travel training;

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*Decide the criteria
which will be used to
evaluate the RFP.*



- An indication of what the relationship of the transit system and travel training firm will be after the firm has been chosen;
- A requirement for the firm to indicate the types of reports it will make regularly on its expenditure of funds;
- The transit system's measures to monitor the performance of the contract;
- The process to be used if the proposers wish to develop joint venture proposals; and
- The method of payment to the selected contractor.

Before the RFP is circulated, work with members of the selection committee to develop criteria for evaluating proposals. Some possible criteria might include the following items:

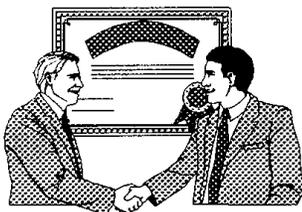
- The experience of the proposing firm in doing training for people with disabilities;
- The experience of the people identified in the proposal in training people with disabilities;
- The quality of the approach suggested by the proposing firm;
- The cost of the service being provided;
- The degree to which the proposal provides a comprehensive approach to travel training for all people with disabilities;
- The degree to which the proposed services will interface with other services for people with disabilities;
- Financial viability of the proposer; and
- Adequacy of services and equipment.

A strict set of criteria must be established before the proposals are evaluated, so everyone knows exactly what they are. Attach numerical weights to the evaluation criteria, so that the reviewers can assign specific scores in each category.

To determine who should receive the RFP, conduct an inventory of potential travel training providers. Probably the best potential providers are local social service agencies who know the problems encountered by people with disabilities and know how to address them (either internally or by referral to other agencies). If an organization can draw upon national experts when required, it is a definite advantage.

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If any travel training work is done by outside agencies, develop a monitoring method.



While it is probably best to have this work done by a local agency, in some cases the level of expertise may not be present to do effective travel training. If this is the case, send the RFP to national companies that specialize in travel training, or the state or regional offices of national groups. If in doubt about whom to send RFPs to, contact local agencies for their input.

If any travel training work is contracted to outside agencies, develop a method to ensure that the contractor is providing a continuously high-quality product. The RFP should include reporting requirements, follow-up studies, trainee surveys, training program evaluation forms completed by trainees and caregivers, and other mechanisms to monitor the quality of the services.

PEER-TO-PEER TRAINING

One of the lowest cost and most productive methods of travel training is peer-to-peer training. This approach can either be used by itself or with other travel training approaches. It involves a person with a disability serving as a coach for another person who has a disability. The coach travels with the trainee and shows the trainee exactly what he or she must do to use the transit system effectively.

The coach can show the trainee how to do the following:

- Select a transit route;
- Determine the fare (types and amount of fare payment);
- Hail a bus;
- Use a wheelchair lift; and
- Pay the fare.

The coach can also show the trainee what the bus operator will do for the patron.

This approach requires the identification of individuals who will act as trainers for travel training. One ready source of volunteers may be members of the oversight committee or people they know.

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These volunteers may require instruction in some aspects of travel training. The instruction for coaches should include training in the following topics:

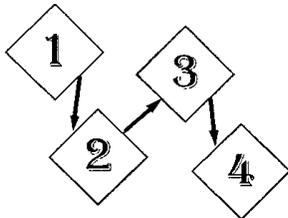
- An overview of public transit in the community;
- Reviews of all bus routes in a system and the major points of interest near them;
- The transit system's fares;
- The process used to determine ADA paratransit eligibility;
- The process used to apply for a reduced fare identification card for people with disabilities;
- The process used to hail a bus, particularly for those with vision impairments;
- The process of boarding, securing, and alighting a person in a wheelchair; and
- The process for registering a complaint or offering a suggestion.

In the class for instructors, convey tips that can be used by students to make travel by fixed-route transit easier. Include what subjects should be brought up, what types of training approaches can be used, and tips for travel training.

After the trainers have been trained, assign candidates for travel training to those who will be most compatible with them. Some traits that should be considered in assigning peer coaches to students include the following:

- Similar demographic background;
- Similar outside interests;
- The pace of learning the student seems to prefer;
- Similarity of disabilities; and
- Similarity of outlook on life.

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The introduction of a travel training program is an opportunity to review those materials that describe the transit system and how to use it.

STEP 6: DEVELOP TRAVEL TRAINING MATERIALS

A travel training program is a good opportunity to assess whether information for the general public and for people with disabilities is adequately informing people about transit services.

Examine the schedules to see if they are easy to read. Ask the travel training oversight committee to review the format of schedules to ensure that they are readable by people with disabilities. Ensure that no color is used on the schedule that cannot be detected by people with limited vision or color blindness. Develop an approach for providing schedule information to people with visual impairments.

Clearly present all fare information on one panel of the schedule or brochure. The availability of reduced fares for older riders and people with disabilities during off-peak hours must be indicated on the schedule. Note in the schedule that a transit rider must present a Medicare card or some other type of identification when they board the bus to be eligible for the discounted fare. Be sure that people can find and read the fare information.

If the transit system is not fully accessible, indicate accessible bus routes. Provide clear directions for times when a wheelchair-lift-equipped bus is not scheduled. These directions should indicate whether there is a fixed-route accessible bus demand program or how a person can secure complementary ADA paratransit.

Examine the system map to make sure that it shows all bus routes in the system through graphic techniques that make the map easy to use for all people. On the system map, identify basic information about fare programs for people with disabilities and other programs, such as the travel training program, that are oriented to patrons with disabilities.

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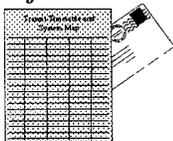
Develop an article about fixed-route services available for people with disabilities.

Develop an article about fixed-route transit services available to people with disabilities. Indicate basic information regarding how to use a bus; transit fares; how to obtain materials in accessible format; and boarding, securing, and disembarking passengers using wheelchairs. Figure 7-7 illustrates such an article.

Consider developing specific materials for travel training use, such as an article that debunks some of the myths about riding fixed-route buses. Some of the myths that arise and the ways to discredit them are shown in Figure 7-8.

Another article could describe efforts to address the needs of people with disabilities, to encourage people to use transit, and to offer travel training to people who wish it. While most of the materials will be required for travel training itself, some materials will be for home reference. Travel trainers should have copies of all timetables and system maps to help people identify which transit services to use.

Develop home reference materials.



To develop new materials that are easy to use, refer to schedules and brochures developed by other transit systems.

Travel trainers may develop a small, pocket-sized information card to distribute with all important information about using fixed-route buses, including phone numbers to call in an emergency. An example card is shown as Figure 7-9.

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<p style="text-align: center;">HOW BUSES CAN SERVE YOU</p>	<p><u>What to Do First</u></p> <p>_____</p> <p>_____</p>	<p><u>Programs for People with Disabilities</u></p>	<p><u>Procedures for Boarding People Using Wheelchairs</u></p>
	<p><u>How to Get Transit Information</u></p> <p>_____</p> <p>_____</p>	<p>-Off-peak reduced fare program for people with disabilities</p>	<p>-Hailing the Bus</p> <p>_____</p>
<p><u>Fares Information</u></p> <p>_____</p> <p>_____</p>	<p>-On-call, accessible fixed-route buses</p>	<p>-Using the Wheelchair Lift</p> <p>_____</p>	
<p><u>How to Get Bus Schedules</u></p> <p>_____</p> <p>_____</p>	<p>-Completely accessible routes</p>	<p>-Being Secured in the Bus</p> <p>_____</p>	
<p><u>How to Identify Your Bus</u></p> <p>_____</p> <p>_____</p>	<p>-Signaling devices for those with vision impairments</p>	<p>-Paying the Fare</p> <p>_____</p>	
	<p><u>Telephone Number for Additional Transit Info. For People with Disabilities</u></p>	<p><u>Compliments or Complaints General Transit Information Telephone Number</u></p>	
		<p>-Travel training programs</p>	<p>-Deboarding the Bus</p> <p>_____</p> <p>_____</p>

Figure 7-7. Sample Information Article

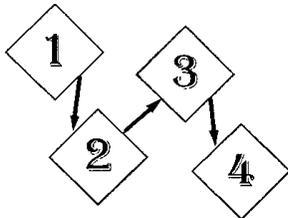
**CHAPTER 7: TEACHING PASSENGERS TO USE THE
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Myth	Method for Discrediting Myth
➤ Boarding a person in a wheelchair takes too much time.	➤ Boarding time studies.
➤ People with disabilities are likely to be the victims of criminals if they use fixed-route transit.	➤ Security program--crime statistics.
➤ Bus operators are unfriendly and not sensitive to the needs of people with disabilities.	➤ Bus operator attitude surveys. ➤ Training programs.
➤ Fixed-route buses are unreliable.	➤ On-time statistics from a transit agency.
➤ Wheelchair lifts are unreliable.	➤ Procedures and training for maintaining lifts. ➤ Statistics on lift reliability.
➤ Fixed-route buses are always getting into accidents.	➤ Transit agency safety program. ➤ Accident statistics.

Figure 7-8. Myths and Methods to Discredit Them

<u>The Super Transit Authority</u>	<u>Telephone Number</u>
➤ Number of general transit travel information	<u>555-1000</u>
➤ Number for customer complaints	<u>555-2000</u>
➤ Number of ADA paratransit provider	<u>555-3000</u>
➤ Number to call if problems occur after the customer complaint office closes	<u>555-4000</u>
➤ People at transit agency who can be notified if problems occur	
Name: Terry Transit Tel.	<u>555-5555</u>
Name: Barry Bus Tel.	<u>555-5556</u>
Name: Sharon Schedule Tel.	<u>555-5557</u>

Figure 7-9. Travel Training Information Card



Define the audience adequately.

STEP 7: IMPLEMENT THE APPROACH

The following discussion identifies some of the issues that should be raised in implementing a travel training program.

DEFINE THE TRAINING AUDIENCE

Define the target audience for travel training adequately. People with different types of disabilities have profoundly different training needs. People who use wheelchairs will want to know about the procedures for hailing a transit bus, boarding while using a wheelchair, securing a wheelchair and passenger, and deboarding in a wheelchair. People with visual impairments may be more concerned with the specifics of a journey from their house to some of their most common destinations, including work, school, or shopping. People with hearing impairments may be concerned about how a driver can respond to questions and how they can indicate that their bus stop is coming up.

When developing a program, allow enough variation to address any possible needs of people with disabilities.

DEFINE TRAINING OBJECTIVES AND TOPICS

Be clear about what will be accomplished with a travel training program and which topics will be discussed to accomplish these objectives. A travel training program might have the overall objective of making the use of fixed-route buses the mode of choice. To this end, a set of topics might include the information shown in Figure 7-10.

Develop a set of training objectives and topics that will address those needs as identified in conversations with advisory groups and in any market research work that is done.

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1. How to use a bus—
 - a) bus schedules,
 - b) system maps, and
 - c) paying your fares;
2. Discrediting popular myths about bus riding —
 - a) attitudes of drivers and
 - b) attitudes of passengers who do not have a disability; and
3. Training people in riding a bus —
 - a) summoning the bus,
 - b) boarding a bus using a wheelchair,
 - c) securing a wheelchair and passenger in a bus, and
 - d) deboarding a bus.

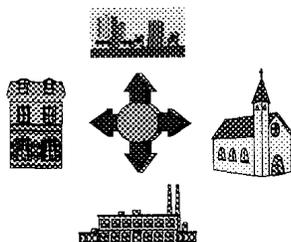
Figure 7-10. Training Objectives and Topics

IDENTIFY TRIP GENERATORS

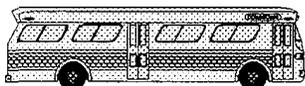
Use the oversight committee to help identify major trip generators that are either trip origins or trip destinations for people with disabilities. Some possible sites are the following:

- Large apartment complexes;
- Large employers;
- Shopping centers;
- Hospitals;
- Educational facilities;
- Houses of worship;
- Community centers; and
- Rehabilitation centers.

In addition to data that can be acquired from members of the oversight committee about the local trip generators, use a list of the most common origins and destinations served by the ADA complementary paratransit service. This list will be valuable in a number of ways. Plot destinations on a map to check the distribution of accessible fixed-route buses to see if they can be adjusted to better serve the origins and destinations of people with disabilities. If informational presentations are given, use this list as a starting point of sites for general presentations about travel training or as an actual travel training program.



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Consider having small groups ride together on the system.



TRAINING BUS

An important tool for travel training is an actual bus that people would encounter as they travel by fixed-route. Because many of those being trained have never been on a transit bus before, it is necessary to demonstrate how to signal to be picked up by a bus, how a wheelchair lift works, how a wheelchair and passenger are secured, how a fare is paid, and how a patron indicates to a driver that he or she wishes to get off a bus.

If there are different types of transit buses, with different wheelchair lift locations or securement positions, have examples of these different types of buses at travel training sessions. This is particularly important if some of the buses in the transit system's fleet have rear-door-mounted wheelchair lifts, while others have front-door-mounted lifts.

As part of the training, consider having small groups ride together on the system, make transfers, and encounter as many circumstances as possible. To make the training most effective, do the following:

- Break large groups into groups of three to five people and have each small group ride with a trainer;
- Ride during off-peak hours to avoid crowds, but not if the headways would be too long;
- Plan transfers at stops with a number of routes, so the trainer can teach trainees about identifying routes;
- Provide regular fare media to trainees, such as tickets or tokens, but train them on how and where to purchase their own; and
- Be sure operators are notified that travel training may occur on their vehicles at any time, with dispatchers providing current information.

SLIDE PRESENTATIONS

Another tool to use for travel training is an audiovisual display. The least expensive and most flexible is a slide show illustrating how a person with a disability can utilize fixed-route transit. While this technique can be used, it depends upon the presentation skills of the person doing the training. A more expensive display than a slide show is a video. A video can provide a uniform presentation (which can be critiqued by an oversight committee) and can provide a consistent explanation of all major points covered in a travel training program.

SELECTING TRAINERS

Three types of trainers can be used in a travel training program: representatives from the transit system; other paid professionals; and volunteers.

Transit System Representatives

Three types of individuals can engage in travel training from a transit system. These are highly skilled professionals who are familiar with the transportation concerns of people with disabilities, other professionals, and bus operators.

Highly skilled professionals, sensitive to the needs of people with disabilities, are generally involved in providing ADA complementary paratransit. While their talents can be used for any of the travel training model alternatives, they are most needed if a program of travel training tailored to the individual is chosen. They might be involved in the initial determination that a person is not eligible for ADA complementary paratransit, but would benefit from travel training. These people may be engaged in some of the individualized instruction that is part of travel training. If travel training is done by an outside entity, this person would be the logical choice to monitor the contractor's performance.

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Develop a cooperative relationship with community agencies that can assist in travel training.

Other professionals at the transit system can be involved in making informational presentations about travel training and in providing general travel training. Included in this group may be individuals from the travel information center who can give travel planning assistance with general travel planning sessions.

Bus operators also can assist with travel training. They are often the most knowledgeable, experienced, and empathetic of all transit employees. If a decision is made to employ a training bus as part of an informational presentation, an operator or qualified staff person must be assigned to drive the bus to a site and operate the wheelchair lift. This person must also be aware of the needs of people with disabilities. Select an operator who is particularly friendly with passengers, talkative, well informed about the system and the service area, and skilled in the use of accessibility equipment. The appearance of a friendly, competent operator will encourage people to trust the transit system to transport them.

Other Professionals

In addition to transit system personnel, involve other paid professionals in travel training, particularly training tailored to an individual. The inventory of community resources will reveal programs offered by other agencies which can be used by those being travel trained. Developing a cooperative relationship with these agencies can result in high-quality training, through referrals, at a very low cost. Consider working with community agencies to jointly develop training programs that can then be administered by transit system professionals. Combine transit expertise with expertise on the capabilities of people with disabilities to develop an effective program.

The second set of outside professionals involved in travel training may include people or organizations contracted by the transit system. Employ outside professionals if there are insufficient internal transit system and local agency resources, there is a commitment by the transit system to do individualized travel training, and the funds exist to accomplish this goal.

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Volunteers

Volunteers can be recruited from the oversight committee or on their recommendation. Volunteers with disabilities have firsthand experience of some of the challenges in using fixed-route buses. A person being travel trained may be more comfortable asking questions of a person with a similar disability.

ADVERTISING

After a travel training program has been developed, advertise its availability to all who might want to avail themselves of it.

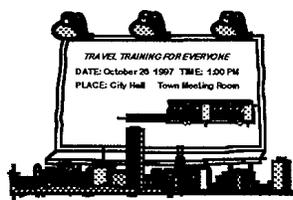
Review the list of trip generators and identify those where travel training could assist many people. These locations should be contacted and, optimally, they can serve as sites for training. If they agree to be sites or agree to cooperate, post notices about training at these locations or at nearby sites, distribute brochures describing the program, insert information in newsletters or local newspapers for these locations, and make presentations at meetings held at these locations.

Other sources of travel training candidates are organizations that are advocates for the needs of people with disabilities. A notice in these organizations' newsletters can be very effective publicity.

Send notices to any people who are using ADA paratransit who might be candidates for travel training to see if they are interested in the service.

Develop a campaign that encourages people to urge relatives with disabilities to be travel trained. This may involve the development of a short article that explains what training is, debunks some myths about travel training, and indicates some of travel training's benefits.

Develop a campaign that encourages family members to participate.



CHAPTER 7: TEACHING PASSENGERS TO USE THE FIXED-ROUTE SYSTEM — TRAVEL TRAINING



Assess the different skill levels of people in order to determine what kinds of travel training are appropriate.

Churches, synagogues, and mosques can often be used to heighten awareness of travel training and services. Make efforts to contact places of worship.

Contact local newspapers, particularly neighborhood papers, so they can write an article about the new training. Provide them with information and try to include a photograph of training taking place at a scenic location or a landmark.

The process of developing and implementing a travel training program is ongoing. Be alert to modifications to improve the training. Be aware of additional locations and organizations which might be enlisted to facilitate future travel training efforts. Once the first round of training is completed, do not assume the work is done. Travel training programs must be continually improved if they are to attract new riders.

ASSESS PARTICIPANTS' SKILL LEVELS

In order to assess what types of travel training are appropriate for each individual, evaluate each candidate's abilities. This assessment may be as simple as taking all necessary information from the initial application form and making a decision.

The application for travel training should be a direct result of the outreach and paratransit eligibility determination process. As efforts are made to publicize training, applications should be distributed by transit agency personnel at various meetings they attend and mailed to anyone requesting them. An application form might include the information as shown in Figure 7-11.

**CHAPTER 7: TEACHING PASSENGERS TO USE THE
FIXED-ROUTE SYSTEM — TRAVEL TRAINING**

Travel Training Application Form	
Name	_____
Address	_____ _____ _____
Telephone Number	_____
Age _____	Sex _____ M _____ F
Do any of these conditions apply to you:	
> use a wheelchair	_____ Y _____ N
> have difficulty seeing in daylight	_____ Y _____ N
> have difficulty seeing during the nighttime	_____ Y _____ N
> require some type of mobility aid	_____ Y _____ N
> have difficulty hearing	_____ Y _____ N
> other	_____ _____
Are you eligible for ADA paratransit?	
_____ Yes	_____ No _____ Don't know
What types of things would you like us to cover in a travel training session?	
_____ _____ _____	
FOR ADDITIONAL INFORMATION CALL TRANSIT SYSTEM A AT _____.	

Figure 7-11. Travel Training Application Form

CHAPTER 7: TEACHING PASSENGERS TO USE THE FIXED-ROUTE SYSTEM — TRAVEL TRAINING

A program should be developed which is tailored to the person or group being travel trained.

The evaluation should be checked by telephone if there are any questions or if a reviewer cannot determine what type of travel training is appropriate from the application.

PERFORM TRAVEL TRAINING

After all the preparatory work, travel training can begin. Tailor a program to the individual or group of people being travel trained. Information gathered on the travel training application form will indicate those specific skills requested by applicants. Instructors can emphasize and elaborate on these sections in the program. The program should address the topics as shown in Figure 7-12.

1. Discussion of the community's transit system
2. Reassurances
 - a) Explain findings of market research involving the attitude of fellow passengers
 - b) Explain market research concerning the attitude of drivers
3. Discussion of the materials needed to ride a fixed-route bus (schedules and route maps)
4. Transit fares
 - a) Reduced fares
 - b) Transfers
 - c) Zone charges
 - d) Other items as appropriate
5. Discussion of a bus
 - a) Place to pay fare
 - b) Place to get information
 - c) Typical questions drivers can answer
 - d) How to notify driver of the need to leave the bus
6. Wheelchair procedures (if needed)
 - a) Boarding a bus using a lift
 - b) Having a wheelchair and passenger secured in a bus
 - c) Deboarding a bus
7. Explanations of incentives
 - a) Free fares for an introductory number of trips or for all ADA-eligible trips
 - b) Guaranteed ride program
8. Real-world practice
 - a) Using the transit system with a travel trainer or companion
 - b) Using the transit system individually
9. Resources available for future reference or assistance

Figure 7-12. Suggested Topics for Travel Training Program

CHAPTER 7: TEACHING PASSENGERS TO USE THE FIXED-ROUTE SYSTEM — TRAVEL TRAINING



LISTS OF TRAVEL COMPANIONS AND TRAVEL TRAINERS

As part of travel training, consider matching riders with peer companions to travel with them on their first trips. For people with a low level of impairment, such assistance may be all that is necessary. For people with more significant impairments, a structured companion program may be necessary. Work with local agencies to develop the program. In general, companions can travel regularly with the rider, providing less and less assistance over time. By the end of the program, the companion travels separately from the rider and observes as the trips are completed independently.

Work with the project's oversight committee to compile a list of peer companions and qualified travel trainers who can accompany the newly trained individuals on trips.

STEP 8: EVALUATE THE PROGRAM

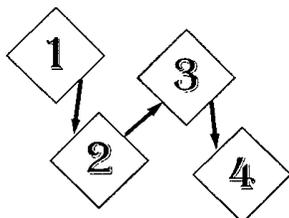
To determine if a travel training program has been a success, and warrants continuing support, measure the effectiveness of the program. Ways to evaluate a travel training program are discussed in the following subsections.

OBJECTIVE EVALUATION MEASURES

One objective evaluation method is to count the number of people who have participated in such travel training activities as informational presentations, training sessions, and surveys. The number of brochures distributed, the number of articles in various publications, and the number of interviews with reporters concerning the program could also be used to objectively measure the success of the program.

Another evaluation measure consists of counting the number of accessible bus boardings starting with a 4-year average. A 4-year average should be used initially because the number of boardings or persons using wheelchairs is generally so low in the absence of a serious program to increase the use of accessible fixed-routes that wide variations from year to year are likely.

Use a number of objective measures to evaluate the program.



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*Track the number
of people who attend
public hearings.*



*Effective travel
training is affected
by Sensitivity
training,
equipment reliability
and
ADA paratransit
determination
system.*

After travel training has occurred, survey those who received the training to determine whether their attitudes toward riding buses have changed and whether this change resulted in increased use of fixed-route buses by people with disabilities.

SUBJECTIVE EVALUATION MEASURES

An indirect measure of whether or not the program is effective is to track the number of people with disabilities who attend public hearings. The number and type of complaints by people with disabilities also can help determine if some aspects of a travel training program should be changed.

Have the project formally or informally evaluated by members of the project oversight committee and by any general advisory committee of people with disabilities who assist the transit system.

CONCLUSIONS

In this chapter, a series of steps have been presented that, if followed, can result in a valuable travel training program. These steps involve identifying a need for travel training, defining funding needs and resources, conducting public involvement, conducting market research, selecting a training model and approach, developing travel training materials, implementing the program, and evaluating the program.

While the previous discussions itemized the fundamental components of a travel training program, the following items (not intrinsically part of a program) can have a major effect on it:

- Proper sensitivity training, emergency response training, and training in recognizing people with hidden disabilities for all bus operators. If the operators are not adequately trained in these areas initially, and continually given refresher training, the best travel training can have little effect.

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- Equipment reliability. People who are travel trained have to feel confident that if they choose to use fixed-route transit, all equipment related to the wheelchair lift and securement hardware will be present and in good working order.
- A thorough review of a transit system's ADA paratransit eligibility determination system. In the absence of accessible bus services and a travel training program, many transit systems interpret the rules regarding functional disability very liberally. Tightening the interpretation of these rules becomes more feasible with a program of travel training in place. Reevaluation of the ADA paratransit eligibility determination process can result in many people, who are currently using ADA complementary paratransit, using fixed-route buses.

The intent of the ADA is to encourage people with disabilities to use mainstream community services, with complementary paratransit used only when their needs cannot be satisfied by accessible fixed-route service. Merely having a disability, physical or mental, is not sufficient for exclusive use of paratransit. Ideally, a single, non-biased third party should be involved in assessing eligibility for paratransit services. By rigorously enforcing the ADA paratransit eligibility requirements and offering a comprehensive travel training program for a quality fixed-route service, many current paratransit riders can become satisfied fixed-route transit riders.

**CHAPTER 8:
MARKETING
FIXED-ROUTE
SERVICES**

INTRODUCTION

The purpose of a marketing campaign is to influence the behavior of people in a way that results in a willing exchange between the fixed-route system and the customer. The system exchanges a service for the time, money, or involvement of customers.

Historically, marketing was concerned with large groups of people — the mass market. Consumers were treated as a more or less homogenous group, with similar needs, desires, and expectations. But recently, marketing has focused on defining groups of people more precisely into market segments or target markets or niche markets. Markets are segmented on the basis of several criteria (income, marital status, age, address, occupation, education, hobbies, buying patterns, etc.), that can be used in various combinations so that the fixed-route system is marketing services to a narrowly defined group of consumers.



Target markets, correctly defined, are exclusive yet exhaustive. They define a particular group of people and the definition can be applied to everyone in the group. Paratransit patrons form one such market segment. On the basis of transportation choice, they can be differentiated from fixed-route riders, from people who travel in a single occupant vehicle, and from people who walk to their destination. However, successful marketing to paratransit patrons requires that this group be further defined into ever smaller, niche markets. A rider with a vision impairment has needs, desires, and expectations of transportation that a rider with a cognitive disability does not. Marketing campaigns that treat paratransit patrons as an undifferentiated mass will fail. The great challenge of marketing to paratransit patrons is to identify the market segments that exist within that larger group, decide on the approach that will result in a willing exchange, and conduct the campaign. Marketing to paratransit patrons is a definitive example of niche marketing.

Paratransit riders are a market segment that proves an old Chinese proverb, "Tell me and I'll forget, show me and I may remember, involve me and I'll understand."¹ Paratransit riders, as a group, often do not or sometimes cannot respond to standard marketing efforts of telling and/or demonstrating, for

¹ Quoted in Menchin, Robert S. *The Mature Market*. Probus Publishing Co., Chicago, Illinois. 1989. p. 71.

example, how to ride a bus. They often need to be involved on a more personal, one-to-one basis, so that they are active participants in learning about transportation choices. To identify their transportation choice needs and expectations, use focus groups, advocacy committees, and trusted representatives. Individual contact should occur and is important. Without feelings of trust and confidence in the safety, reliability, and security of fixed-route service, paratransit riders will not be interested in learning how to ride the bus.

MARKETING

Expectations and costs of fixed-route

Marketing is more than advertising. It is "... the analysis, planning, implementation, and control of programs designed to create, build, and maintain beneficial exchange relationships with target audiences for the purpose of achieving the marketer's objectives."

² Unlike education or public relations, marketing is action-oriented and seeks to educate and to change attitudes in order to induce people to take desired action. Marketing is an approach or philosophy that an organization embraces in order to meet the expectations of present and future customers.

Exchange



Marketing depends on a willing exchange between marketer and customer. Each has something the other wants. The transit system provides transportation; the passenger provides a fare, and, in the focus of this guidebook, rides fixed-route instead of paratransit service. Each benefit involves costs. An exchange results "... whenever the target customer perceives the benefits of the behavior the marketer seeks to exceed the costs or sacrifices the behavior entails and this ratio of benefits to costs is better than that achieved by 'spending' the costs in any other conceivable way."³ Generally, benefits to the customer are costs to the marketer.

² Phillip Kotler and Alan Andreasen. *Strategic Marketing for Nonprofit Organizations*, 4th ed. Englewood Cliffs, New Jersey: Prentice Hall. 1991. p. 38.

³ *Ibid* p. 125.

*Convenience
Safety
Risk*

While the exchange of money for a product or service is an overt exchange, it often represents the culmination of a series of more covert exchanges between marketer and customer. Unless the covert exchanges take place, and continue to occur every time the customer and the marketer interact, no money will be exchanged and the relationship between customer and marketer breaks down.

For example, regarding covert exchanges, there are several exchanges that take place when a person who is frail and elderly rides a fixed-route bus. These exchanges involve safety, convenience, and risk, which are all covert costs. The passenger must meet the bus' schedule, may have to walk a good distance to the stop, and may have to wait for extended periods of time in inclement weather. Once the bus arrives, this passenger must board, pay the fare, find a seat, and sit down before the driver pulls out. On the bus, this passenger must interact closely with strangers and a possibly discourteous driver and undergo a possibly uncomfortable ride, while worrying if he or she is on the right bus, what to do if the bus breaks down, and if the bus will keep to its schedule. For this passenger, the fare is just one of many costs. The marketing task of the transit system is to discover these costs, recognize their validity, and design systems and procedures that reduce these costs to minimally acceptable levels.

Expectations of a transit ride:

- *Safe*
- *Clean*
- *Easy-to-use*
- *Predictable*
- *Enjoyable*
- *Priced right*

These costs are not limited to paratransit riders. They are costs that all mass transit riders pay, although general public passengers do not have to overcome certain obstacles in paying them. All passengers expect the following characteristics in a transit ride:

- Safety (free from physical injury, the threat of physical injury, and negative feelings),
- Cleanliness (clean vehicles, stops, and terminals; drivers in presentable uniforms),
- User-friendliness (easy-to-read-and-understand instructions posted at stops and terminals; courteous drivers who take the time to explain),
- Predictability (a realistic schedule; well-maintained vehicles so as to avoid breakdowns; if an accident or breakdown occurs, the system has an effective contingency plan,

Changing to fixed-route involves a high degree of personal involvement.

- Enjoyability (friendly drivers who try to know their regular passengers and offer pleasant, smooth rides), and
- Value (inexpensive in terms of risk, safety, and convenience).⁴

Marketing fixed-route service to paratransit riders is asking a group of riders to change their behavior in ways that will definitely increase their costs without always increasing their benefits. The decision to change to fixed-route requires a high degree of personal involvement on the part of riders. With little or no previous experience in riding fixed-route service upon which to draw, riders must make a transportation choice that does the following:

- Involves elemental aspects of one's self-image;
- Involves personal or economic sacrifices;
- Risks major personal or social costs if the wrong choice is made; and
- Involves considerable peer pressure for or against.⁵

These are all high costs. For people with disabilities and older riders, they can be particularly high. If the costs to the customers are greater than the benefits, then no exchange will occur. Therefore, transit systems must find ways to reduce these costs to acceptable levels so that an exchange will take place. The marketing process provides the structure that enables exchanges to take place.

THE MARKETING PROCESS

The marketing process systematically provides information, sets marketing goals and objectives, designs the marketing mix, implements plans, and then evaluates the results. The process answers three basic questions about the organization: Where are we? Where do we want to go? How do we get there? This is shown in Figure 8-1.

*Where are we?
Where do we want to go?
How do we get there?*

⁴ Peter M. Schauer, *Marketers in Transit Workbook*. Boonville, Missouri.

⁵ Kotler. p. 130.

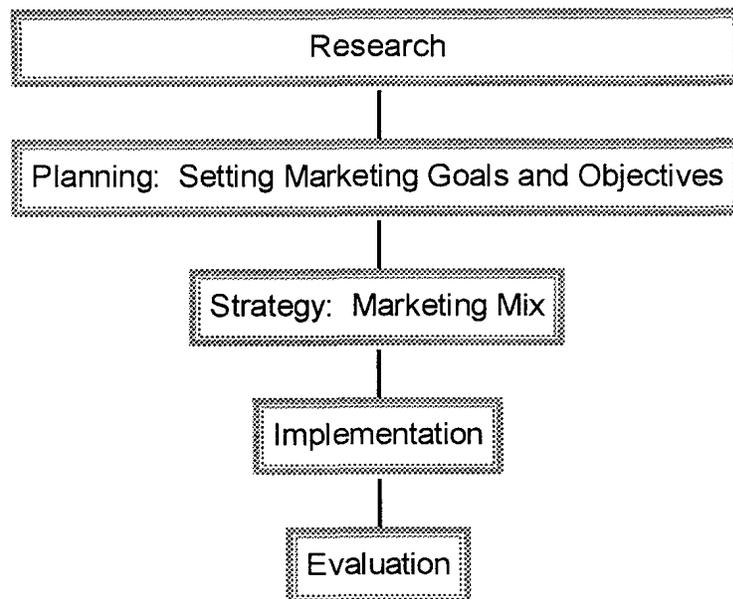


Figure 8-1. The Marketing Process

Each element of a marketing plan reinforces and augments the strengths of the other components. A great promotional campaign cannot compensate for a product or service that does not meet the needs of customers. The immediate response by customers to a promotion's free trial period offer or witty advertising slogan may be encouraging but repeat customers will be few as people realize that the service was not what they expected and did not help them simplify or improve their lives. On the other hand, a well-designed service cannot achieve anticipated levels of success unless potential customers know it exists and how it can benefit them.

Where are we?

RESEARCH

Research is perhaps the most important element in the marketing process. It answers the first question — Where are we? Research does not have to be formal, expensive, or done only for major decisions. A mixture of formal and informal methods provides a more complete picture than just using one method. Whatever form it takes, research is essential to discovering what paratransit riders need, desire, and expect from transit, as well as their anxieties and fears. Guesswork and assumptions are neither accurate nor adequate and often reflect wishful thinking. (See Chapters 4 and 6 for more information on market research).

Less formal, more personal research methods are useful.

Where do we want to go?

Goals and objectives must be practical, realistic, measurable, part of the organizational culture, and unique.

How do we get there?

With paratransit riders, less formal, more personal methods that allow an exchange of views will gain information and increase involvement with the transit system. Focus groups are excellent, as are interviews with people who are elderly and people with disabilities on board fixed-route and paratransit vehicles. Conduct presentations with question and answer sessions to clubs, organizations, and advocacy groups in order to gather information. Be sure that the transit system representative giving the presentation is calm, knowledgeable, trustworthy, and interested in helping the audience solve their transportation problems.

PLANNING

On the basis of the research results, design the marketing campaign so that it reflects where the organization wants to go. Setting goals and objectives provides direction and motivation to staff, tells the outside world what the organization thinks is important and where it is going, and provides criteria for measuring success or failure. To succeed, goals and objectives must be as follows:

- Practical (the organization must have the necessary facilities, personnel, funds, and equipment);
- Realistic (the political and social climate of the community must be in accord with what the organization wants to achieve);
- Measurable (goals that cannot be measured in quantitative and qualitative ways are not useful);
- Part of the organizational culture (goals and objectives will fail unless employees know that top management supports them and rewards progress toward achieving them [hidden agendas and unspoken rules tend to undermine overt plans, particularly those that require fundamental changes]); and
- Unique (in fulfilling its goals and objectives, the organization will offer its customers something that no one else can).

STRATEGY

After the goals and objectives are set, develop strategies that will allow the organization to answer question 3 - how do we get there? These strategies must address the issue of market segmentation and the 5 Ps of marketing — product, placement, price, promotion, and people. Market segmentation is the division of a large market into smaller, target or niche markets that share certain

characteristics. Design and deliver services that satisfy the needs, desires, and expectations of the niche markets. Concentrate offerings and do not waste resources by trying to please everyone.

Market segmentation depends on the following criteria:

Exclusivity (the group is separable from other segments),

- Exhaustiveness (every potential target group member can be included in some group),
- Measurability (the market segment can be easily identified and its needs and desires can be measured),
- Accessibility (the market segment can be reached and served),
- Substantiality (the segment is large enough to be worth pursuit by a marketing campaign), and
- Differential responsiveness (each segment responds differently to marketing campaigns).⁶

Markets can be defined on the basis of many criteria — income, age, marital status, employment, transportation choice, and/or physical characteristics. Paratransit patrons form a market segment, but need to be further defined to be reached successfully. Each general group — people who are elderly, people with developmental disabilities, people with hearing disabilities, and people with vision disabilities - needs to be treated as a discrete niche with materials and approaches tailored to that niche. If populations are large enough to meet the substantiality criteria, then the four general groups can themselves be further segmented as shown in Figure 8-2.

Because people who are elderly and people with disabilities need high involvement in choosing transportation modes, small groups are more appropriate for marketing approaches than are larger, more impersonal ones. A niche market may be defined as a group home or a workplace that employs one or two people with developmental disabilities.

⁶ *Ibid.* pp. 169-170.

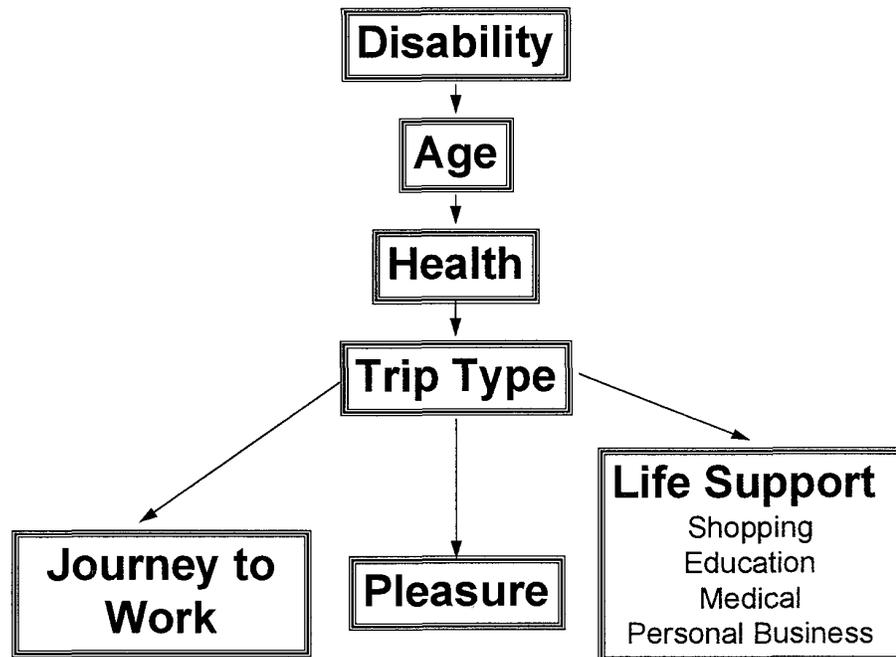


Figure 8-2. Further Segmentation of Market Niches

Marketers should recognize that the transit system serves direct customers and indirect customers. Direct customers are the people who actually ride the bus. Indirect customers are the people who support and assist the direct customers, people with disabilities, and other riders. Direct and indirect customers are shown in Figure 8-3. Indirect customers, through the communication feedback loop, significantly influence direct customers (that is, riders).

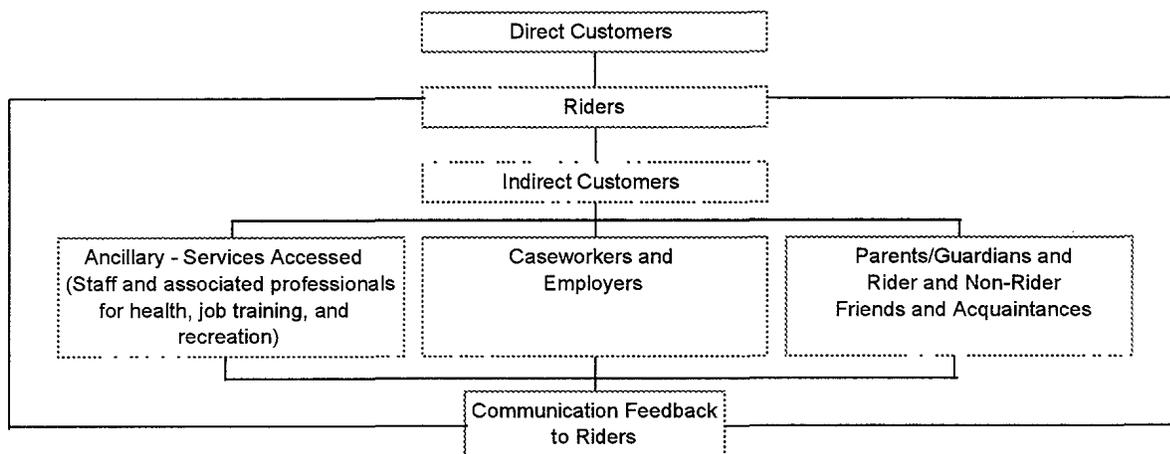


Figure 8-3. Direct and Indirect Customers

People who provide support and assistance are niche markets in themselves.

5 Ps of Marketing

Product

Placement

Price

Promotion

People

The product is the service.

People who provide support and assistance are niche markets in themselves and are important targets in efforts to influence the behavior of direct customers. They help people who are elderly and people with disabilities decide about transportation. Employer involvement is also crucial in determining whether a person with a disability can use fixed-route to get to work if, for example, the bus gets the person to work 10 minutes late.

Once the niche markets are defined, use the 5 Ps of marketing to form the marketing campaign. The 5 Ps are product, placement, price, promotion, and people.

Product

Product is the service that the transit system is offering to its customers, in this case, fixed-route service instead of paratransit service. The product will likely have to be redesigned to accommodate the needs, desires, and expectations of people who have been riding paratransit and who cannot use fixed-route vehicles in the same way as the general population.

Placement is access to the service.

Placement

Placement is the location at which the customer accesses the service. Bus stops, routes, schedules, and vehicle availability determine if, for example, a rider who uses a wheelchair will be able to ride the bus to and from work everyday or if he or she must continue to rely on paratransit or private transportation.

Price is also reduction of risk and inconvenience.

Price

Price is the recognition and acceptance of the utility costs (that is; risk, convenience, safety, high involvement of self, and change) of riding fixed-route instead of paratransit.

Promotion consists of introductions, special offers, and advertising.

Promotion

Promotion involves service introductions, special offers, and advertising that is usually mistaken for marketing. Make promotions to these niche markets personal, individual, and in formats that take into account the disabilities associated with the people within a market segment. For people who are elderly and people with disabilities, direct techniques and one-on-one promotions are most effective. Radio, TV, and the newspapers usually do not work well; however, riders who are elderly have a tradition of newspaper reading, so newspapers are an effective tool in reaching them. Promotions always must be tailored to niche market characteristics.

Transit personnel, especially drivers, must be seen as trustworthy.

People

People are essential in marketing to riders with disabilities who are elderly. The enhancement of their lives through mobility is the reason for the marketing activities. Transit system personnel, particularly drivers, are the key to delivering courteous, helpful service that is competent and timely and delivered while minimizing fears and anxieties.

This is a niche market, even at times focusing on the individual person. A marketing campaign that succeeds with people with developmental disabilities will fail to reach people who are elderly. On the other hand, a campaign that is successful with people who are elderly will often reach people with disabilities as well. (People who are elderly typically do not consider themselves as having a disability.) A bus schedule printed in Braille and a speaking bus will

Changing to fixed-route is a big step — allow 9 to 12 months.

not be useful to a person with a hearing disability. There is no mass market approach; however, by focusing on the 5 Ps, a unique approach for the market can be found.

IMPLEMENTATION

Implementation of the marketing process is a critical step. A long time frame in which to implement a new service, or an established service that has been redesigned for new customers, is necessary. Set aside at least 9 months to a year for initial implementation. Because changing to fixed-route from paratransit is a major change, allow adequate time for individuals to make up their minds and to try the new service. Make management plans flexible enough to allow for adjustments to the process as it develops. Premature closure of the marketing program will prevent it from reaching potential passengers and will create distrust in current riders.

EVALUATION

Make formal and informal evaluations.

The final part of the marketing process is evaluation. Determine what succeeded and what failed. Similar to research, conduct evaluations on an individual or small group basis, with ample opportunities for discussion and opinions from customers. Use a mixture of formal and informal evaluations to form a more complete picture. Evaluation is actually the beginning of the next marketing cycle, with the lessons of the previous effort incorporated into the next. As such, marketing is a continuous, strategic process.

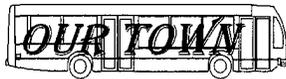
While the process may appear daunting, taking it step by step and allowing enough time will result in a successful program. The following section explains how marketers can reach their target markets.

MARKETING TO PARATRANSIT RIDERS

There are five important components for marketing to paratransit riders. First, riders are looking for consistency and reliability of services. Second, travel training encourages switching to the fixed-route services. Third, particular promotional formats are most effective. Fourth are the ten cardinal rules for marketing to people with disabilities. The fifth component is the difference among marketing to the four primary paratransit market niches.

CONSISTENCY AND RELIABILITY

Qualities that work on a mass market basis are qualities that niche markets would also like to enjoy, only tailored in ways that are accessible. Riders who are elderly and people with disabilities need, desire, and expect the same excellent service that the general public wants and expects in public transportation. This excellent service is based on a consistent product that is delivered with a uniform look, feel, and sound. Frequent changes and inconsistent service are confusing to all riders, but are particularly disturbing to paratransit riders who are trying to negotiate fixed-route service.



Mark vehicles in a consistent pattern that instantly makes them recognizable as one of the system and makes access to information an act that does not require hunting and searching. Place route numbers and names on the same place on all vehicles. Develop a strong, obvious color scheme to appear on all the vehicles in service. Doors that are painted a contrasting color to the body of the bus help those with vision and orientation problems locate entries and exits more quickly. Display a recognizable logo on all sides of the bus to help people recognize it without having to read.

Replace words with pictographs whenever possible. This helps people who have cognitive disabilities, those who are illiterate, and people for whom English is a foreign language.



Make the appearance of the drivers as consistent and obvious as the vehicles. Distinctive uniforms, complete with properly worn hats, make them recognizable as part of the transit system and give them greater authority. People with disabilities and riders who are elderly have to rely on the assistance of the driver and need to feel confident in his or her ability to help them. A uniform helps build confidence in both the driver and the passengers.

Attributes that build brand awareness for the general public are more than just aids to people with disabilities and riders who are elderly. Consistent appearance signals to customers that they will get the same satisfactory service every time. For example, the benchmark of this concept is McDonald's restaurants. The golden arches symbolize a type of value and level of service that is the same in Moscow, Tokyo, Paris, and Boonville, Missouri. There is never any doubt about the procedures — where a person orders, pays, receives, and consumes the products. The "how to go about

People learn landmarks, shapes and colors. Avoid unnecessary changes.

If there are changes the transit system should give notice, contact riders, increase driver responsibility, and contact sites.



it" is clear and requires little effort on the part of consumers. Transit managers need to strive for the same levels of predictability to persuade riders to use fixed-route transit.

Predictability and consistency are important because some riders travel by rote. Having learned the route, bus, and driver, they do not look for any other information, such as route numbers, bus numbers, or street addresses. They travel using landmarks of building shapes, colors, and other distinguishing characteristics in the surroundings that have significance to them. While true of some general public riders, this behavior is more prevalent in people with cognitive disabilities or literacy problems that prevent them from reading, processing, and retaining information presented in writing. To assist these riders to use fixed-route, predictable, service is necessary. A route change or delay, problems with the bus, or a construction detour are not only sources of anxiety but may cause riders to become disoriented and incapable of locating themselves. They will not know where they are and will not have the tools to find out. Fixed-route operators need to do the following:

- Avoid changes unless absolutely necessary,
- Give plenty of notice so that rote travelers can adjust to any required change,
- Make personal contact with riders likely to have difficulty adjusting to the changes (volunteers, advocacy groups, caseworkers, employers, and family members can be involved in this task),
- Increase the driver's responsibilities as guide and assistant, so that he or she is identifying and helping passengers at risk of becoming confused by the change, and
- Establish a telephone tree for sources of information used by rote travelers (that is, worksites, schools, social services, and family).

TRAVEL TRAINING

Travel training is a proven method of helping paratransit riders switch to fixed-route. Conducted on a one-to-one basis or in very small groups, travel training can build the skills and confidence necessary to ride fixed-route. Peer instructors can demonstrate how difficulties are best handled — the best way to board the lift, what the driver is expected to do, and what to expect from other passengers. Travel training can also prepare travelers who memorize their trips, the rote travelers, on what to do if the route changes or if there is an

emergency. Drivers participate in travel training as well by providing day-to-day reinforcement of how to ride the bus and by acting responsibly and courteously when someone needs help.

Travel training is an educational, outreach effort that covers three areas of transit travel, as shown in Figure 8-4.

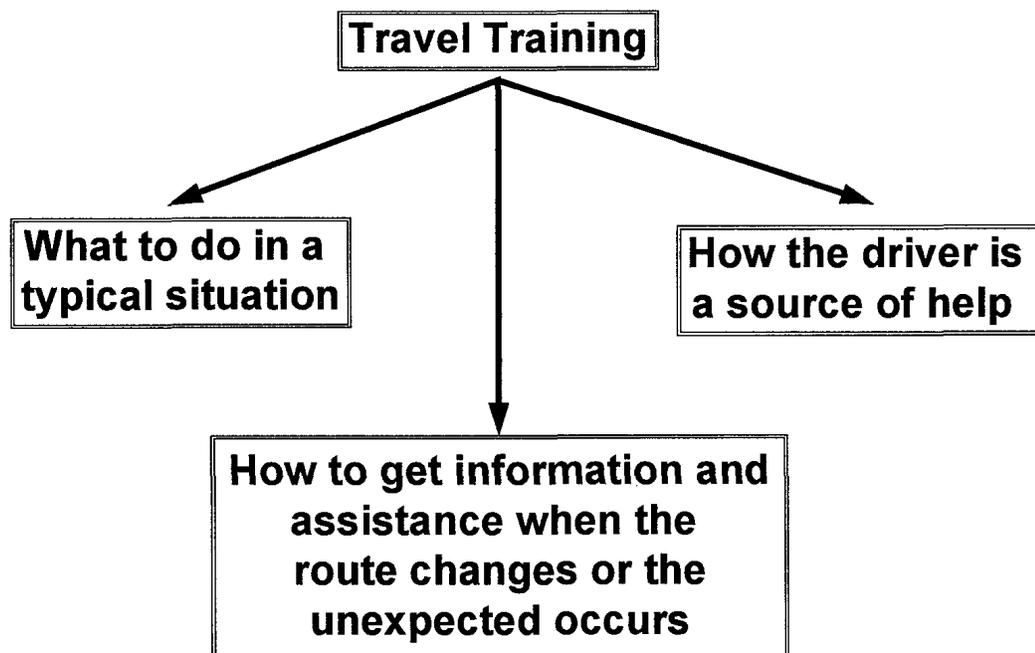


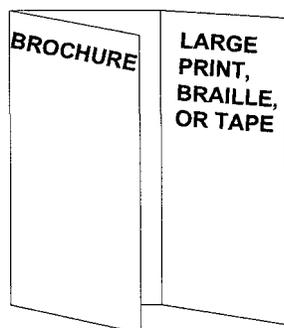
Figure 8-4. Three Areas of Transit Travel Training

There are four critical times for riders with cognitive disabilities.

People with cognitive disabilities or with developmental disabilities can ride fixed-route, but need help to do so. Travel training can help riders cope with the critical times. These critical times and appropriate transit system response are as follows:

1. The initial ride with the trainer — The trainer should alert the driver that the person in training is going to be riding the bus at these times and will probably need some extra attention at first.
2. The first ride alone — The driver should be courteous and reassuring, without being patronizing.

3. Expected changes — The transit system should offer sessions with travel trainers and/or ask for volunteers from the social service network (for example, group homes and independent living groups) to help their clients adjust to the change.
4. Unexpected changes — During travel training, trainees should receive maps and how-to cards, which use pictographs instead of text that show how to get help.



PROMOTIONAL FORMATS

Promotions are communications with niche markets in languages, formats, and contexts that individuals in the market understand and with which they feel comfortable. Particularly in the paratransit field, creative thinking and new perspectives are needed to ensure that the marketing message is understood. For people with visual disabilities, brochures, schedules, and other printed materials should be available in large print, Braille, or audio tape. In communities with sizable populations for whom English is a second language, information should also be available in a multilingual format. Using pictographs instead of words will help reach people who are illiterate, residents and visitors who cannot read English, and persons with cognitive disabilities.



Pictures and Symbols

Pictographs are often used in maps and brochures for tourist destinations that attract people from all over the world. Maps of San Francisco or Disney World provide many clues to help people orient themselves. Shapes and colors of buildings are depicted to give the map depth. Distinguishing landmarks and multicolored lines depicting transportation routes are more helpful than maps covered with text and numbers. People have different cognitive abilities so printed material should offer as many clues as possible to enable people to orient themselves.



Newspapers

Newspapers are not suitable for all paratransit patrons, but are useful for reaching riders who are elderly who retain the newspaper-reading habit. Such riders can be reached through newspaper ads and special tabloid-type inserts that come out annually or at times of special promotions (for example, Christmas shopping or special

events). The text can be extensive, as long as the print is large and the ad is uncluttered. To create a uniform appearance, use the same typeface used for other transit texts and prominently display the logo. If colors are used, they should be the same as those on the vehicles. A uniform organizational image is the key to projecting a secure, reliable image for the transit system.

Classic layouts work well because customers who are elderly are accustomed to them and know what to expect. Always feature a follow-up mechanism such as the system's telephone number and address. The ad should also be a call to action: a coupon to clip and mail in for a free bus pass or 50¢ off a beverage at participating restaurants upon presentation of a monthly bus pass are some potential response mechanisms. Figure 8-5 shows a classic layout.

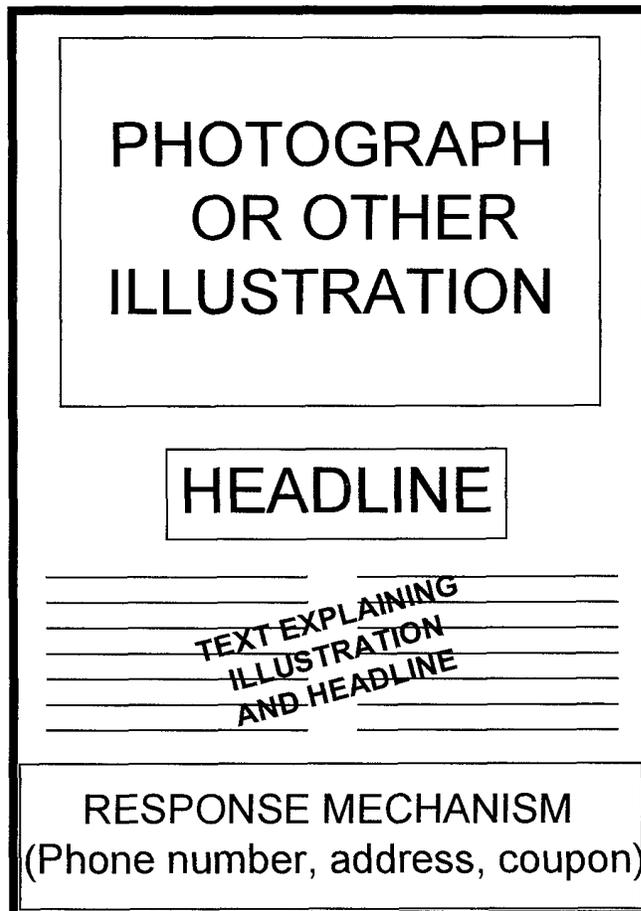


Figure 8-5. Classic Advertisement Layout

Color

Color offers a strong visual cue to riders that the bus, ad, or bus stop, is part of the bus system. Color can also enhance safety. Highway departments use strongly contrasting colors (such as yellow or orange backgrounds with black lettering) which are easy to recognize and read. Other strong combinations are as follows:

- White on green;
- White on blue;
- White on brown; and
- Black on white.

Avoid low contrasts — they are difficult to read. Generally, strong, primary colors are exciting, while pastels are soothing. Many systems throughout the country use white buses because of maintenance costs; however, white buses are more difficult to see on the street or when approaching a bus stop. Strong colors will make the vehicles easier to see from a distance and heighten awareness of the transit system's existence.

Photographs

Photographs should be in black and white or in full color, clear, and crisp and should show people engaged in desirable behavior. Focus on people's faces and never show a bus without passengers.

Basic Components

Whatever format is chosen, promotions should tell paratransit riders the following same basic information:

- Routes - places to go on each route;
- Schedules - times that riders can get to their destinations and hours and frequencies of service;
- How to ride or how to get travel training;
- Cost to passengers in terms of fares; and
- Availability of accessible buses and helpful, courteous, professional drivers.

*Basic Information —
Routes,
Schedules,
How to Ride,
Cost, and
Accessibility*

All promotions and materials directed at paratransit target markets should also include, frequently and prominently, the following three international symbols as appropriate:

1. The international symbol of accessibility;



2. The international symbol for TDD communications; and



3. The international symbol for information.



These symbols are the best tool currently available for "mass marketing" to the paratransit rider.

TEN CARDINAL RULES FOR MARKETING TO PEOPLE WITH DISABILITIES

Figure 8-6 lists rules to follow when designing a marketing campaign and promotional materials.

①	Segment the market into niches. Paratransit riders are in themselves a niche market compared with transit ridership as a whole; however, within the niche, there are distinct groups with separate needs, desires, and expectations of transit. People who are elderly do not consider themselves as having a disability and will not respond to marketing programs that address them as having a disability.
②	Research the formats and methods needed to communicate with each niche and, with further research, the needs of each individual paratransit rider.
③	There is no mass approach with which to target these markets. When possible, each paratransit niche will derive a general impression of the service from the system's general marketing program, but to get niche patrons to ride fixed-route will require one-on-one communication and demonstration.
④	Refine the marketing message to make it clear and empathetic without being patronizing.
⑤	When use of print media is appropriate, use large print and an uncluttered layout with lots of white space.
⑥	When using color, remember to use colors with high contrasts — black on yellow, black on orange, or white on black — that will stand out and be easy to read. Use the same colors throughout the system — from the buses to the bus stop signs to logos and stationary. A consistent appearance increases patron confidence.
⑦	Use alternatives to text and script — pictographs, logos, and cartoons — to clarify the message and cue behavior without the customer having to read text.
⑧	Avoid a contrived look when using photographs. Keep the design of the ad or brochure simple and uncomplicated. Do not let the materials look as if they are striving for a "big effect."
⑨	Develop a familiar theme, approach, and look. Pretest it using focus groups and personal interviews with members of the target market, make adjustments, and then stick with it.
⑩	Evaluate the marketing program "on the fly" and at designated intervals. Based on the evaluation, make changes when they are necessary.

Figure 8-6. Ten Cardinal Rules for Marketing to People with Disabilities

MARKETING TO PARATRANSIT NICHE MARKETS

There are four distinct paratransit niche markets, each with its own characteristics: people who are elderly; people who use wheelchairs; people with visual impairments; and people with hearing impairments. Figures 8-7 through 8-10 provide tips on marketing to these niches.

Riders who are elderly do not consider themselves as having a disability — ensure that marketing reflects this.
Riders who are elderly consist of the "young" old, who view themselves as active individuals capable of independent action, and the "frail" old, who need assistance. The size of both these groups is increasing as the population ages and medical advances prolong life.
Riders who are elderly respond best to advertisements in which the subjects appear to be slightly younger than themselves. The advertising campaign for Oldsmobile, "It's not your father's Oldsmobile," while aimed at younger consumers, worked well with the young old who felt that they were not driving an "old man's car."
More than half of all women 65 years and older live by themselves. ⁷ While, wanting to be independent, they cannot provide all their own transportation, so in some ways are captive riders — but are not always captives of fixed-route.
Riders who are elderly have higher expectations of retirement than did their parents. Riders who are elderly and have a higher income and higher living standards than those previously the norm, have greater service expectations. Riders who are elderly are not simply grateful for a ride — they expect a quality ride too. This trend will increase as Baby Boomers age and expect to be able to continue an active life into retirement.

Figure 8-7. Tips on Marketing to Older Riders

Put the person first, not the disability. Treat each person as an individual and work hard to address his or her personal needs with high-quality service in a comfortable environment.
Avoid language that condescends. Avoid terms like handicapped, wheelchair-bound, and physically challenged.
Remove obstructions and barriers to transit use, such as insufficient numbers of accessible vehicles on routes (particularly at rush hour), lifts that malfunction, bus stops that do not accommodate wheelchairs, bus stops located across busy streets or in locations without sidewalks, drivers who stop too far from the curb, and drivers who do not assist with the lift or securement.
Feature clear pictures of people in wheelchairs using fixed-route service in advertisements and brochures.

Figure 8-8. Tips on Marketing to People Who Use Wheelchairs

⁷ Robert Leventhal. "The Aging Consumer: What's all the Fuss about Anyway?" *Journal of Consumer Marketing*. Vol. 8 No.1. Winter 1990. p. 29.

<p>Do not rely on Braille, although materials should be provided in this format, if requested. Only 5% to 10% of people who are blind can read Braille. Large print and audio formats should also be available.</p>
<p>Drivers should announce stops and speak to passengers as they board the vehicle. Drivers should remember that there is no reason to raise their voices for people with visual impairments.</p>
<p>Devices that indicate with sound where the exit is — beepers or some sort of tone — will help people who lack visual cues to locate the door.</p>
<p>Use contrasting colors on bus doors so that they stand out. Use bright, contrasting colors for brochures and schedules, bus stops, and terminals. They help people recognize the bus system. Use lighter colors on top and darker colors below (to resemble wainscoting) in vehicles and facilities to help people orient themselves.</p>
<p>Maintain well-lit buses and facilities. Do not locate stops in dark, poorly lit locations.</p>

Figure 8-9. Tips on Marketing to People with Visual Impairments

<p>Have telecommunications devices for people with hearing impairments (TDD) and print the number prominently on all literature and materials.</p>
<p>In facilities, install smoke alarms and other devices that signal with a flashing light as well as a siren.</p>
<p>Realize that even accomplished lip readers can only understand about 65% of all that is said to them. Speak slowly and look directly at the person's face when talking. Provide training for drivers.</p>
<p>Have a person fluent in sign language available whenever the bus system is operating and make sure people know that this service is available. Realize that there are two forms of sign language — signed English and American Sign Language — and that an interpreter in one is useless in the other.</p>
<p>Use a one-to-one approach when marketing transit service to people with a hearing impairment. This community has diverse communication needs.</p>

Figure 8-10. Tips on Marketing to People with Hearing Impairments

WHAT CHANGES TO THE TRANSIT SYSTEM WOULD ENCOURAGE YOU TO RIDE IT?

When survey respondents were asked, "What changes to the transit system would encourage you to ride it?" responses ranged from "no change" to specific changes like "no coffee breaks on the bus" and "change the disinfectant used on the buses." The two most frequently mentioned changes were "bus stop closer to home" and "reliable schedules." In general, changes mentioned by respondents fell into the following three broad categories:

- Changes to facilities (such as bus stops, shelters, sidewalks, and vehicles),
- Changes to services (including schedules, travel training, and education programs for other passengers), and
- Changes to driver performance and behavior.

CHANGES TO FACILITIES AND VEHICLES

Changes respondents would like to see made to transit facilities and vehicles included the following:

- Facilities
 - Bus stop closer to home,
 - Stops not located across busy streets,
 - Sidewalks on the way to the bus stop,
 - Sidewalks kept clear of snow,
 - Curb cuts,
 - Benches at stops,
 - Ventilated bus shelters, and
 - Increased safety at bus terminal; and
- Vehicles
 - Beeping doors to signal exit,
 - Bigger route numbers on buses,
 - Route numbers on the left side and rear of bus,
 - More comfortable seating,
 - Bars to hold onto and pull oneself up with,
 - Access for walker/scooters,
 - Reserved seats for people unable to stand,
 - Lower steps and smaller steps (with less rise per step), and
 - Lowering steps.

Changes should be considered for the entire trip — not just the bus.

Some of the changes listed indicate that the respondents are thinking in terms of the entire trip they are making, not just the bus ride. Not only are they worried about getting on the bus (bars to pull oneself up with, lower steps, and access for walker/scooter), they are concerned about being able to reach a bus stop (stops closer to home, stops not located across busy streets, curb cuts, sidewalks, snow removed from sidewalks), being able to wait for the bus (benches at stops, ventilated bus shelters), getting on the right bus (more and larger route numbers on buses), having a place to sit (reserved seating area), getting off the bus (beeping doors to indicate exit), and being safe when they arrive (increased safety at bus terminal).

Enhance reliability, frequency, and destinations.

CHANGES TO SERVICE

Service changes mentioned reflect some common complaints about mass transit service and some that need to be made to accommodate riders with disabilities:

- Reliable schedules;
- More frequent schedules;
- Extended service hours;
- Consistent schedules;
- Expansion of service area;
- Elimination of the need to transfer;
- Routes to senior centers, VA hospitals, etc.;
- Travel training;
- Education program for other passengers; and
- Longer term passes.

Drivers should help riders.

CHANGES TO DRIVER PERFORMANCE

A third general area of concern was the performance of bus drivers. Respondents felt that drivers should be their allies in negotiating fixed-route service. Several respondents indicated that the driver should function as an active intermediary between passengers with disabilities and passengers who might be discourteous, impatient, or disruptive. Responses in this area included the following:

- Assistance getting on and off;
- Time to get on and off;
- Buses come to a complete stop;
- Drivers announce stops;

- Drivers trained to use wheelchair stations, lifts, and other equipment;
- Stop closer to curb;
- More polite bus drivers;
- Smoother rides;
- No speeding; and
- No coffee breaks on bus.

Bus drivers must perform a complex job. Not only do they have to drive safely and keep to a schedule, they must function as representatives of the transit system as a whole. For most passengers and non-passengers, bus drivers are the transit system, and their performance of their jobs helps determine public opinion about transit. This is particularly true for paratransit riders who necessarily interact more with drivers than do other riders.

Product
Placement
Price
Promotion
People

THE 5 Ps AND SURVEY RESPONSES

Using survey responses as a base determination of what paratransit riders need and expect from fixed-route service, formulate a marketing plan. "The marketing approach implies specification of a product to be engineered in a manner so as to resolve some problem facing target consumers."⁸ The 5 Ps of marketing — product (in the case of transit — service), placement, price, promotion, and people — provide the framework around which a plan is built.

PRODUCT AND SERVICE

In common with general public passengers, paratransit riders want fixed-route service to operate safely, to be on time, to have wellmaintained vehicles and shelters, and to have convenient stops near the places they most often frequent. For people who have mobility difficulties, these service goals are even more important. Standing in the hot sun waiting for a bus is inconvenient and annoying for general public passengers, but for an elderly person who cannot stand for long periods of time, it may be impossible.

⁸ Seymour H. Fine *The Marketing of Ideas and Social Issues*. New York: Praeger Series in Public and on profit Sector Marketing. CBS Educational and Professional Publishing. 1981, p. 21.

Several survey respondents indicated that paratransit riders wanted fixed-route service to function as paratransit service. Doorstop service, being able to arrive and depart when you want, direct travel to a destination, and always having a seat or position are features that people who ride paratransit and people who never ride any form of transit want on fixed-route service. Fixed-route service cannot deliver this level of service but it can offer more flexibility for paratransit riders by eliminating the need to reserve a ride in advance. This flexibility can be further enhanced by improvements to schedules, routes, stops and shelters, vehicles, and service.

Schedules: Provide enough service and enough time to serve.

Schedules

Schedule improvements include the following:

- Reviewing and redesigning schedules so that drivers have enough time to assist those who need help and still keep to the schedule,
- Reviewing and redesigning schedules to better serve riders with disabilities so that destinations most often visited (that is, clinics, hospitals, employment sites, and shopping areas) are served by transit at the correct times,
- Sufficient numbers of vehicles during peak times on busy routes so that persons in wheelchairs or with other equipment can board, and
- Offering more evening and weekend service.

Routes: Have commonly visited destinations and reduce transfers.

Routes

Route improvements may include the following:

- Reviewing and redesigning routes to better serve riders with disabilities so that destinations most often visited (that is, clinics, hospitals, employment sites, and shopping areas) are served by transit and
- Reviewing and redesigning routes to reduce the number of transfers that most paratransit riders would need to make.

Stops: Provide good placement and quality.

Stops and Shelters

Improvements to stops and shelters may include the following:

- Placement of stops so that passengers do not have to cross busy streets;
- Installation of bus shelters that have benches and enough room for persons using wheelchairs;
- Cooperative efforts with city government to install curb cuts and sidewalks near bus shelters and terminals;
- Bus schedules and general information about the transit system posted in bus shelters;
- Adequate and routine maintenance of bus shelters; and
- Safety precautions for bus shelters, including good visibility, shelter from the elements, and routine patrols by security.

Vehicles: Provide accessibility, identification, visibility, and usability.

Vehicles

Improvements to vehicles may include the following:

- Making all fixed-route vehicles accessible;
- Development of a reserved seating system for riders who are elderly or riders with disabilities;
- Printing of route and vehicle numbers in large numerals and posting them on the front, on the sides near the doors, and on the back of the vehicle;
- Interior and exterior paint schemes that are highly visible and assist with rider orientation;
- Grab bars near stairs and handholds near waist-level height; and
- Beeping devices to indicate entrances and exits.

Service: Ensure good customer relations and provide travel training.

Service

Service improvements may include the following:

- Establishment of a customer relations department staffed by experienced transit officials to handle liaison with riders with disabilities;
- Establishment of an advisory committee of paratransit riders, representatives of the disabled community, and interested agencies; and
- Establishment of a travel training program for riders.

PLACEMENT

The placement of fixed-route transit is implicit in its name. At certain stops along a specified route at certain times of certain days, consumers and transit service intersect. That place is not at the door of a rider's home or at the door of the destination, but somewhere along the fixed-route that the vehicle travels at regular intervals on particular days.

Consistent performance is an attribute that riders with cognitive disabilities count on because bus travel becomes a pattern that can be repeated without variation or frequent need for learning new skills. For such riders, unexpected changes in routes or significant schedule delays are cause for anxiety.

Transit systems must ensure consistent service and adherence to schedules. Consistent service requires the following:

- Realistic schedules that allow time for passengers who take more time than average to board and exit vehicles and time for drivers to assist passengers and operate lifts and secure wheelchairs without having to speed or operate vehicles in an unsafe manner;
- A maintenance schedule that keeps vehicles and lifts in service;
- Sufficient numbers of vehicles to serve paratransit riders during peak times so that waits for available wheelchair positions are not excessive; and
- An adequate plan to handle vehicle breakdowns and other emergencies.

Fixed-route transit needs to appear at the bus stop according to schedule. This is important for any passenger but for people with mobility problems unexpected delays or problems can be much more difficult and disruptive.

PRICE

In marketing, price refers to more than the actual dollar amount that passengers pay to ride the bus. Virtually every purchase, whether tangible or intangible, involves some mixture of financial and social costs. In fact, Adam Smith attached greater significance to the latter: "The real price of everything, what everything really costs to the man who wants to acquire it, is the toil and trouble of acquiring

"The real price of everything ... is the toil and trouble of acquiring it."



it."⁹ Price refers to the indirect costs of time, inconvenience, social costs, and risks that riders must undertake when riding the fixedroute system. The survey indicated that respondents want to pay either no more than \$1.00 (cost to \$1.00) or no more than \$2.00 (cost \$1.00 to \$2.00). However, respondents were also interested in the indirect costs involved in riding fixed-route. Many of the service features they want to see in fixed-route reduce risks and increase safety.

Paratransit riders are concerned about courtesy and patience from bus drivers and from other passengers. To some passengers with disabilities, the potential social costs, resulting from discourtesy and lack of understanding by other passengers, are high. Professional, courteous performance of passenger assistance by drivers can help reduce social costs for riders and set examples for other riders. Drivers who announce stops, competently handle lifts and wheelchair stations, clearly answer questions, operate the bus safely and smoothly, and allow time for passengers to get on, sit down, and then exit, will go far in relieving the anxieties that paratransit riders have about using fixed-route.

While the direct costs transit passengers pay for riding the bus are always at the forefront, the indirect costs cannot be ignored. Riders must consider the entire trip they are making, of which the bus ride is just one portion. Survey respondents emphasized the importance of safe, accessible, comfortable bus stops and shelters so that waiting for the bus does not pose too high a price to pay in terms of security, exposure to inclement weather, and the physical demands of waiting.

PROMOTION

Promotion is the aspect of marketing that people think of when they talk about "marketing." Promotion is seen as a solution for falling ridership, poor service, or the need to attract new riders. However, promotion will fail unless service lives up to the promises, either implicit or explicit, made in promotional efforts. If transit services hope to attract paratransit riders and keep them on fixed-route service, a long-term effort is required.

⁹ *Ibid.* p. 83.

Promotion can include trial periods, free travel days, money-back guarantees, assistants-ride-free programs, and introductory rides.

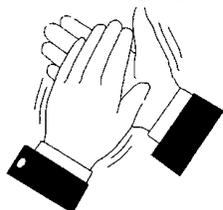
Promotion lets target riders (paratransit riders) know that fixed-route service is now available to them and that the transit service stands ready to help them make the transition from paratransit to fixed-route travel. Trial periods, free travel days or hours, warranties or money-back guarantees, assistants-ride-free programs, and introductory rides with a transit-provided guide are ways to introduce paratransit riders to fixed-route. To keep them on fixed-route, good, courteous service is necessary. Promotional campaigns need to run for a sufficiently long time — at least 9 months — so that people will have time to make up their minds to respond.

Promotion to people with disabilities may require other formats in addition to newspaper ads, brochures, pamphlets, posters, and radio and TV ads. Word of mouth among current paratransit riders, while riding paratransit, would be an avenue of inexpensively reaching potential riders. Information would have to be correct (make sure the paratransit driver knows about fixed-route service or at least how riders can get information) because inaccurate information can set back any promotion.

Communication with the Transit System

In response to the question, "If you wanted to learn about fixed-route, where would you get information?" most people answered "call the bus company." Present-day communications offer several ways to "call the bus company." To ensure good communication, the bus company should be equipped with TDD (telecommunications devices for people with hearing impairments) numbers as well as voice numbers. Fax and e-mail numbers can be distributed as routinely as voice numbers. For people with visual disabilities, brochures, schedules, and other printed materials should be available in large print, and sometimes in Braille, or audio tape. In communities with sizable populations for whom English is a second language, information should also be available in a multilingual format. Using pictographs instead of words will help reach people who are illiterate, residents and visitors who cannot read English, and persons with cognitive disabilities.

Good Service



PEOPLE

In making sure transit has all the necessary equipment and facilities and is operating smoothly on efficient routes and schedules, systems sometimes forget that transit is a service delivered to people by people and that poor service delivered by discourteous, poorly trained people will negate any advantages brought by

Drivers and Other Riders

excellent equipment and facilities. There is no substitute for good service, competently and cheerfully delivered by employees who are interested in helping people ride the bus.

Paratransit riders able to ride fixed-route service are concerned about two groups of people — drivers and other passengers. Passengers with disabilities, to a greater or lesser degree, must rely on the driver for assistance. Driver training programs need to include sensitivity sessions, role playing, and information on when and how to help as well as how to operate equipment and lifts. Passengers with disabilities should participate in the training.

Drivers and other employees can better communicate with passengers with disabilities by remembering the following:

- Avoid terms like "handicap," "cripple," and "invalid";
- Put the person first, the disability second;
- Focus on abilities and let people do as much for themselves as they can;
- Do not use euphemisms like "mentally challenged" or "special abilities";
- Do not worry about using common expressions like "see here" to a blind person or "listen up" to a person with a hearing impairment; and
- Do not be embarrassed for yourself or the persons with disabilities.¹⁰

One of the keys to providing service is to remember that passengers are individuals. Of course, competent, courteous treatment is to be given to each passenger, but some passengers need a little extra attention. Examples are discussed below.

Older Passengers

Passengers who are elderly may crave a little conversation and a courteous comment meant just for them. For senior riders who regularly ride the same route, a continuing conversation with "their" regular driver frequently develops. If the driver is going on vacation or transferring to another route, the driver should tell his "regulars" and let them know that the new driver also will look after them.

¹⁰ Reedy, 1993, p. 36.

Positive Attitude

A positive attitude to passengers is important. Paratransit riders who make the change to fixed-route service might appreciate verbal recognition from the driver that they are doing OK. Of course, driver comments should not be false, condescending, or demeaning and should be sincerely meant.

Negative Passengers

Negative attitudes of passengers need to be addressed. Drivers need to be firm, courteous, and positive.

Angry and Upset Passengers

Demanding, angry, and upset passengers also need to be handled. A detached, professional attitude and patience are virtues in handling upset passengers. Drivers should do the following:

- Speak in a normal to quiet tone of voice so that the passenger has to lower his or her voice to hear what the driver is saying;
- Listen carefully to what the person is saying, ignoring inflammatory phrases and rhetoric;
- Decipher what the real problem is (maybe the driver and the transit provider are being used as scapegoats for what is really bothering the passenger);
- Inform the passenger about the complaint system and provide forms for complaints; and
- Resolve the situation within the transit provider's guidelines and procedures.

Anxious Passengers

Anxious passengers need to be reassured. Drivers and all transit personnel should be aware that it is common for people, particularly passengers with cognitive disabilities, to treat transit travel, once learned through travel training or by trial and error, as a habit that is done by rote. Unexpected changes are extremely upsetting to these passengers. If the bus breaks down or has to deviate from its normal route, the driver should take steps to reassure anxious passengers by explaining what is happening and that the situation is being resolved.

Impatient Passengers

Impatient passengers need to be calmed. A driver, through prompt, yet unhurried, assistance to those who need it, can act as an intermediary between former paratransit riders who now ride fixed-route (perhaps taking a little more time to maneuver on and off the bus) and impatient passengers.¹¹

¹¹ Elaine Novak, *Developing Policies and Procedures for the Paratransit Operation Complaint System*, p. 13.

Interaction between passengers with disabilities and the general public is more difficult to control. Unless schedules are designed to allow time for passengers with disabilities, delays will be inevitable. These delays can be stressful to other passengers. An area of concern for passengers who are elderly or passengers with disabilities (who cannot stand for long periods or who have difficulty maintaining their balance in a moving bus) is having a place to sit. Reserved seating arrangements can cause resentment by general public passengers who are forced to stand. Requiring the bus driver to ask people to give up their seats for passengers with disabilities could place the driver in a difficult, if not impossible, situation.

A marketing campaign directed at general public passengers will not erase problems of social interaction, but it can alert everyone to the difficulties people with disabilities face when using fixed-route transit and provide some pointers on how to help. This kind of social marketing is challenging because people are being asked to change their behavior (that is, give up a seat or wait for the lift) without any direct benefit to them. In the case of giving up a seat, people are also being asked to act individually and spontaneously in a group situation. However, the bus driver and the transit system can set the example by courteous service and by demonstrating a strong commitment to helping passengers with disabilities ride fixed-route.

DRIVER TRAINING

Driver training should be developed in partnership with community advocacy groups for people with disabilities. Communication techniques, sensitivity sessions, and recognition of the various types of disabilities and how the driver can help with each one should be stressed. Areas to be covered are listed in Figure 8-11.

- I. Introduction
 - A. Objectives
 - B. ADA and integrating paratransit riders into fixed-route
- II. Disabilities
 - A. Sensory
 - 1. Visual
 - 2. Hearing
 - B. Physical
 - 1. Wheelchair
 - 2. Other
 - C. Cognitive
 - 1. Mental retardation
 - 2. Autism
 - 3. Traumatic brain disorder
 - 4. Learning disabilities
 - 5. Alzheimer's
 - D. Health
- III. How to communicate
 - A. Listening techniques
 - B. Adjust style to fit the person
 - C. Verification techniques
- IV. Sensitivity sessions
 - A. Issues involved
 - B. Role playing
 - C. Small group exercises
 - D. Knowing when and how to help
- V. Driver test and evaluations

Figure 8-11. Topics for Driver Training



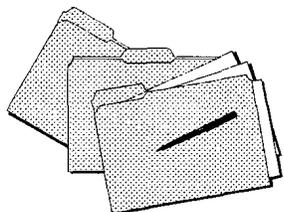
TRAVEL TRAINING

Travel training can also be developed in cooperation with community advocacy groups for people with disabilities. Transit personnel or adequately supervised and trained volunteers (preferably with a similar disability as the person being trained) should ride by appointment and on a one-to-one basis with people who are uncertain how to use fixed-route vehicles. Introductory rides should be free and participants should be given maps, schedules, and how-to-ride guides in appropriate formats.



COMMUNITY RELATIONS

General public riders are informed of the difficulties passengers with disabilities face when using fixed-route service, why transit should be accessible, and what they can do to help. Newspaper ads; advertising placards on the bus, at stops, and at terminals; radio and television public service announcements; and newspaper stories about accessible transit service can let people know that fixed-route service is for everyone. Passengers should be assured that they will not experience delays or be late for their destinations because of assistance given to passengers with wheelchairs or passengers who take a little more time to board.



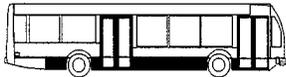
COMPLAINT SYSTEM

The change from paratransit to fixed-route can be difficult. The complaint system should be adapted to communicate in new formats and with people who might have difficulty communicating. The most competent people in the transit system should handle complaints quickly and directly. Passengers need to know the complaint procedures. Prepare separate brochures or include details in system maps or schedules in large print or Braille or on computer disk or electronic bulletin board and on audio tape. A standard complaint system should have the characteristics listed in Figure 8-12.

- A. Passenger contacts transit system
 1. Listen to complaint
 2. Repeat the complaint back to verify information
 3. Apologize to the passenger
 4. Acknowledge the passenger's feelings
 5. Let the passenger know that action will be taken
 6. Thank the passenger
- B. Write down complaint on designated form. Serious complaints should be submitted by passenger in writing if that is possible. Create a paper trail for complaint and write down every action taken in regard to complaint.
- C. Forward complaint to supervisor or manager.
- D. Investigate complaint, listening to everyone involved.
- E. Resolve situation and communicate resolution to the passenger.¹²

Figure 8-12. Example of a Standard Complaint System

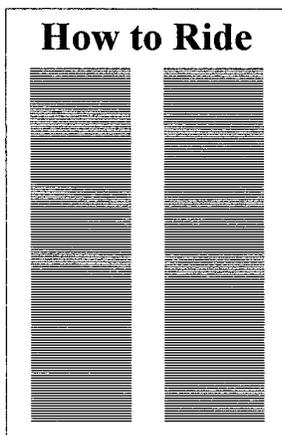
^{12.} *Ibid.*



VEHICLE MODIFICATIONS

Adopt color schemes that will increase visibility of buses and make them easier to ride. Three color schemes can help passengers orient themselves to the bus and its motion. These are as follows:

1. Follow the example of NASA. To help astronauts orient themselves in the weightless conditions of space, surfaces that are "down" are painted in dark colors, while surfaces that are "up" are painted in light colors.
2. Paint bus doors a contrasting color so that passengers can easily discern where the entrances and exits are.
3. Paint or apply to the interior of vehicles broad vertical stripes. The stripes help people, particularly passengers who are elderly or those with vision or spatial orientation problems, to maintain their sense of balance and reduce their risk of falling as the vehicle moves, slows, and stops.¹³



HOW-TO-RIDE GUIDE FOR FIXED-ROUTE SERVICE

Prepare brochures in various formats (for example, large print, Braille, appropriate languages, audio tape, computer disk and e-mail) that let paratransit riders know that fixed-route service is available and that there are training opportunities to help them. Distribute brochures on paratransit services; through social service agencies; and at senior centers, public libraries, city and county offices, and medical offices. Any eligibility standards for fixed-route that the transit system has should be included in the brochure, as well as route maps and descriptions for accessible routes. Information presented in the brochure should include the following items:

- Who can use fixed-route service,
- Which buses are accessible,
- Who can use the lifts and with what equipment,
- When people with disabilities or wheelchair users ride,
- What kinds of wheelchairs are allowed on the bus,
- How wheelchairs are secured,
- How to get on and off the bus,
- How much it costs,

¹³ S.U. Park, B.J. Gilmore, and D.A. Streit. *User-Friendly Bus Interior Design: Reducing Falls Through Improved Visual Environment*. University Park, Pennsylvania: The Pennsylvania State University. 1994.

- What happens if there are problems,
- What sort of seating arrangements there are for people who cannot stand,
- That the ride is safe, and
- How the driver can help.

"For Further Information" numbers (for example, voice, fax, telecommunications devices for people who are hearing impaired, and e-mail) and information about travel training should be prominent. Separate brochures should be prepared for particular target markets such as persons using wheelchairs, senior citizens, or people with hearing impairments.

*Changing Definition
of the Niche Market*

RIDERS WHO ARE ELDERLY

As more people age, the definition of senior citizen is changing. More people are working longer, through necessity or choice, and do not consider themselves as "old." More accurate definitions of senior citizens are the "young" old and the "frail" old. The young old do not feel comfortable with the label old and do not usually participate to the same degree in senior citizen center activities as senior citizens have in previous years. The young old can be attracted by images of fun, youthful attitudes and activities and a sense of adventure. Images showing youthful-looking senior citizens riding the fixed-route to the ballpark or on a shopping expedition downtown would appeal to this group. In contrast, the frail old are more interested in safety, assistance from the driver, having a place to sit, having time to get on and off the bus, and no harassment from other passengers. Brochures, placards, bus cards, posters, and newspaper ads can show a competent, authoritative driver helping an elderly woman onto the bus.

INTRODUCTORY RIDES

Implement an introductory trial offer of 1 week of free rides for paratransit riders who try fixed-route. If riders decide to stay on fixed-route, a half-price monthly pass can be offered. This program should be instituted on a continuing basis with periodic spurts of more publicity and advertisements to remind people that the offer is still in place.

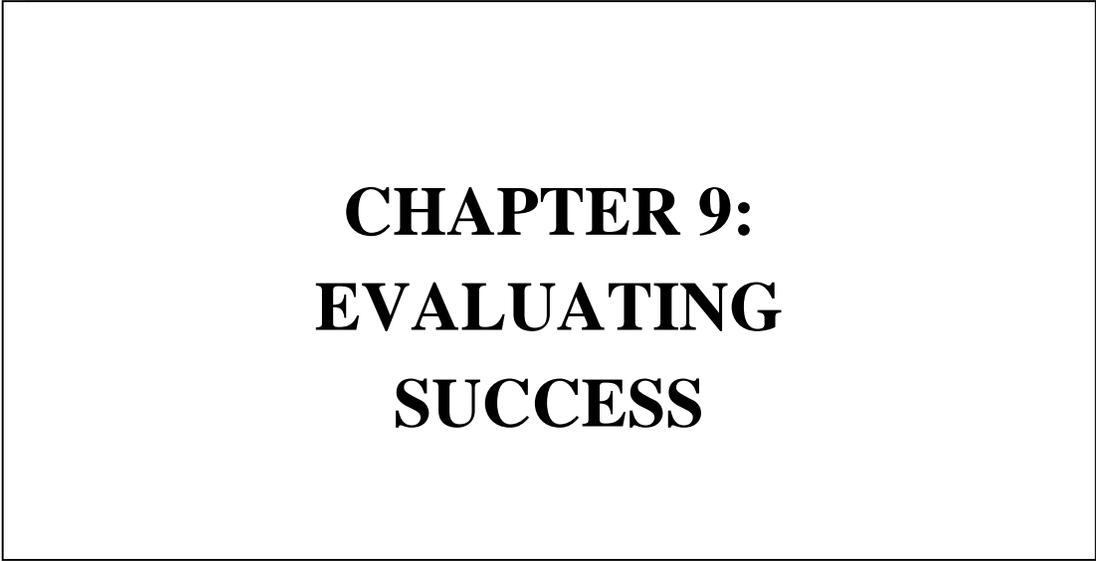
Free Rides!

A variation would be guaranteed satisfaction to new riders who have switched from paratransit to fixed-route. If passengers are not satisfied with the service they have received on fixed-route, their next five rides on fixed-route would be free.

During the introductory trial period, for people who travel with assistants, assistants should ride free as well as the person with a disability. After the trial period, assistants should be able to buy reduced price passes.

CONCLUSIONS

Marketing is more than advertising. In order to attract and then keep people riding fixed-route, all five elements of the marketing mix need to be in place and mutually supportive so as to give passengers the level of service they expect from fixed-route service. The exchange relationship between marketer and customer must be mutually beneficial, with costs to the passenger reduced as much as possible. Marketers need to treat customers as individuals and segment the paratransit market into niche markets. This is not a quick, overnight task, but one that, once accomplished, can provide quality service for all passengers. Quality service, cheerfully and professionally delivered, is the most powerful marketing tool transit systems possess.



**CHAPTER 9:
EVALUATING
SUCCESS**

INTRODUCTION

This chapter describes methods to evaluate the success of programs implemented to attract paratransit patrons to fixed-route services. Chapters 4 through 8 described the following five specific approaches to attracting paratransit patrons to fixed-route services:

- Locating transit stops close to passengers;
- Training drivers;
- Programming accessible bus stop improvements;
- Teaching passengers to use the fixed-route system — travel training; and
- Marketing fixed-route services.

This chapter includes basic steps to evaluate the success of all of the approaches. In addition, for each approach described in the Guidebook, there are specific methods for evaluation. The criteria for success are also described.

BASIC STEPS

For each of the approaches to attract paratransit patrons to fixed-route services, the three basic evaluation steps are as follows:

- Passenger counts,
- Surveys, and
- Observation of service.



Not all riders pay full fare.

For many transit systems, obtaining accurate passenger counts can be difficult. Fares and revenue are carefully counted and accounted for, but, with the variety of fare media in use in most systems, it is not always possible to translate revenue into numbers of passengers. Some passengers pay full fare; others use passes; and still others pay discounted fares for multiple purchases. Older passengers and passengers with disabilities pay discounted fares; students pay discounted fares; and there are sometimes other programs in place for varying fares. So, it is not easy to determine from revenue how many people are riding. Even if the farebox counts the number of fares

Not all riders with disabilities use the lift.

deposited, people using daily, weekly, monthly, or school term passes do not deposit fares.

To evaluate a program to attract people with disabilities, the counting can be complicated by the fact that not all passengers with disabilities use the lift and many have disabilities which are not obvious.

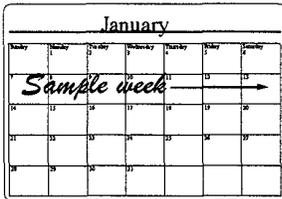
Evaluate current passenger counting capabilities.

It may be desirable to look at numbers of passengers who use particular routes or stops, depending on what type of approach was implemented to attract passengers with disabilities. This kind of information cannot be calculated from general revenues.

Put programs in place to count passengers and to count passengers with disabilities. To determine the appropriate programs, define the capabilities which exist within the farebox and the fare purchase systems. Explore the possibilities within existing capabilities. Some possibilities are as follows:

- If the farebox counts the number of fares deposited, use that to measure the number of some types of passengers. Make comparisons over time to determine how ridership changes.
- If reports are available on the amount of fare media (tokens, passes, etc.) sold by location (main office, transit centers, fare machines, other locations, etc.), compare them over time to determine if more people are riding in different parts of the service area.
- If farebox revenue reports are available by route, compare them over time to determine if more fares are being collected on specific routes. Select routes such as those targeted for particular programs or with newly accessible vehicles or with newly accessible stops.
- If farebox revenue reports are available by vehicle, compare the revenue on accessible vehicles to revenue on non-accessible vehicles. The appropriate comparison can be made between vehicles on the same route, vehicles on routes in the same parts of the service area, or routes that typically experience similar revenue levels.

Implement a manual counting system, if necessary.



COUNTING ALL PASSENGERS

If no mechanism is in place to count the number of passengers who board, implement a program to conduct the counts manually. Counts can be done by drivers or by other employees on the vehicles. Other employees could be regular employees or temporary employees, such as students, hired to count passengers.

The easiest way to count passengers is through a sample, rather than a continuous count throughout the system. A sample allows the count to be conducted over a short time and can reduce the employee time required to complete it. If employees or temporary employees are used, then their time can be concentrated during the sample period. If the count will be conducted by drivers, then a sample minimizes the change in their routine. It is difficult for drivers to start doing something new while they are picking up passengers, but it is possible for them to conduct the counts for a brief time.

There are several ways that a sample can be selected. For the most part, it is preferable to conduct all the samples at the same time, whether it is over a day, a week, or a month. The results will then be comparable, without potential changes due to seasonal or other ridership changes. Some possible sample selections are as follows:

- **To sample ridership at particular times of the day.** On particular routes or on all routes, have drivers or other employees count the number of riders who board during the specified hours. The purpose may be to count the number of riders during the morning or evening rush hours; or to count the number of riders in the off-peak hours, such as 10:00 am to 2:00 pm; or to count the number of riders during the night hours.
- **To sample ridership for particular destinations.** Determine which routes serve the particular destinations and count the riders that board at those stops or disembark at those stops. For example, there may be considerable traffic to and from shopping centers, hospitals, business or industrial parks, or other locations. The sample can be taken for an entire week or day and compared over time for changes. For example, a sample may be taken on one

Monday each month and compared to determine if there is an increase in ridership over the months. Or the sample may be taken for a week each quarter to determine if there is a change. Be aware of possible causes for ridership fluctuations. For example, shift workers may not ride every weekday, so it is necessary to count on the same day each week to compare similar situations. The last day of the month or Fridays may generate additional ridership to locations with banks. Senior discounts at grocery or department stores on a specific day each week may generate additional ridership. Certainly the first weekday after Social Security checks are received can have significantly higher ridership as individuals make their way to the bank and to stores.

- **To sample ridership on particular routes.** Identify the route to measure ridership and count the riders on that route for an entire sample day, week, or month. Compare the ridership over time to determine if there are changes. The route may be selected because of approaches which target it. For example, accessible vehicles may have been added or accessible bus stops may have been installed. The route may serve common destinations for the paratransit service.
- **To sample ridership for specific stops.** If a new transit center or accessible stops have been added to the system, count the number of people who board or disembark at the particular stops. Employees could count the passengers at the stops rather than on the vehicles. The different routes served by the stop can be counted at the same time.

Fareboxes
Tokens
Lift Use
Discount Passes

COUNTING PASSENGERS WITH DISABILITIES

Most systems have a method to count the number of times that the lift is used on the fixed-route. Typically, drivers report on lift usage at the end of the day or shift. For passengers with other types of disabilities, methods need to be implemented to count how often they board.

If passengers with disabilities are eligible for reduced fares on the transit system with an ID card, then the number of people who use the ID can be counted.

In order to be able to accurately count the number of people with disabilities who board the vehicle, set up the discount fare system within the following guidelines:

- The ID card must be distinguishable from other discount passes, such as for elderly people, students, or others.
- Consider the policies for the use of the ID cards to purchase discount tickets or tokens, in comparison to discount cash fares on the vehicle. Counting the purchase of discount tickets provides a good estimate over time of the number of rides people with disabilities take on the system, but does not allow an estimate by route, service area, or transit stop. Actual counts of the use of discounted tickets and passes for cash fares may be more difficult for the drivers to conduct, but they can be more targeted and specific.
- Consider the use of contrasting types of passes to distinguish among passengers with disabilities to determine the effectiveness of particular programs. For example, different discount ID cards for people who are paratransit eligible and for people eligible for a fixed-route discount would allow counts of people who moved from paratransit to fixed-route.
- Implement a very simple method for drivers to count passengers. Fareboxes can be equipped with manually operated counters so that drivers indicate which type of fare is collected. Other hand-held or mounted manual counters can be distributed on sample days. Avoid methods that require too much time or procedures which are too complex.

If ID cards are not used for people with disabilities, it can be difficult to identify many of the people with disabilities who use the service. However, the next section on surveys describes a way to count persons with disabilities.



SURVEYS

Surveys of riders, drivers, and the general public can be very useful to measure the success of a program implemented to attract people with disabilities to the fixed-route services. Survey suggestions are as follows:

- Survey riders to determine if people with disabilities are using the system more frequently.

- Survey to determine people's attitudes toward the system or if they perceive improvements in the service provided.
- Survey riders to determine if focused efforts, such as accessibility of bus stops or vehicles, are achieving the intended objectives.
- Survey the general public to determine the effectiveness of public relations campaigns, marketing efforts, driver performance and attitudes, and the growth of the number of people with disabilities riding the fixed-route services.

Surveys of Riders with Disabilities

Survey riders over the telephone, through the mail, or on board the vehicles. Some considerations for the most appropriate type of survey to conduct are as follows:

How many people with disabilities ride fixed-route?

How many people with disabilities ride both fixed-route and paratransit?

How effective are programs targeted to specific routes?

How effective are public relations?

How is driver performance?

How often do people with disabilities use the fixed-route service?

- Interview people on board the vehicles or at stops to determine how often people with disabilities are using the service.
- Conduct telephone or mail-in surveys of those registered for paratransit to determine how many people with disabilities ride paratransit and also use the fixed-route.
- Conduct telephone surveys of riders who are not registered for paratransit through a random sample (from the telephone book or other list) and screening questions to determine if the person rides transit.
- Conduct surveys on board target route vehicles to measure particular, focused efforts, or conduct surveys at stops on the routes.
- Survey the general public over the telephone or through the mail to determine the effectiveness of public relations, marketing, and information campaigns.
- Survey riders over the telephone, on board vehicles, or through a mail-in survey distributed on vehicles or at stops to evaluate driver performance and attitudes. In on-board surveys, people may be reluctant to answer about the drivers who would be present.
- Survey riders over the telephone, on board vehicles, or through a mail-in survey distributed on vehicles or at stops to evaluate the frequency of use by people with disabilities. In on-board surveys, people may be reluctant to answer about people with disabilities, some of whom may be riding at the time.

Table 9-1 shows some of the advantages and disadvantages of telephone, on-board, and mail-in surveys.

Different types of surveys can be developed to achieve the targeted results. Figures 9-1 through 9-3 show sample surveys of people with disabilities to evaluate the success of programs to attract paratransit patrons to fixed-route services.

Table 9-1. Advantages and Disadvantages of Telephone, On-Board, and Mail-in Surveys

Survey Feature	In-House Telephone Survey	Professional Telephone Survey	On-Board Survey	Mail-In Survey
Response Rate	Response rate ensured through personal contact with adequate follow-up	Response rate ensured through personal contact with adequate follow-up	Response rate ensured through personal contact, but no chance to follow-up	Response rate usually is low
Cost	Costly, but duration control can keep costs down	Professional services can be costly	Duration control can keep costs down	Low cost of printing and mailing
Personnel Training	Personnel training necessary	Training part of professional service	Personnel training necessary	Little training required
Reliability of Results	Reliability based on instrument, personnel quality	Professionals ensure reliability	Reliability based on instrument, personnel quality	Reliability based on instrument and response rate
Sample Reliability	Respondents chosen at random	Professionals ensure reliability	Reliability guided by transit system	Bias if inadequate response rate
Comprehensiveness of Instrument	10-12 minutes ≈ 25 questions	15-20 minutes > 25 questions	5-10 minutes < 25 questions	2 minutes 8 questions

Date	Time	Interviewer
Vehicle #	Tour #.	Survey # (on vehicle today)

Hello, my name is _____ and [name of transit authority] is conducting a survey to ask people about their use of the service. May I ask you a few questions while we're riding?

1 First, we want to talk to people from all over town, so do you live [description of part of service area]? Yes No

2 Do you live [description of part of service area]?¹ Yes No

3 What kind of place are you traveling to now? (Read list if necessary)

- Home
- Work
- School
- Doctor
- Clinic
- Store
- Friend/Relative's House
- Other (write in) _____

4 Approximately how many times each week do you ride the bus? (Is that *how many* round-trips?) _____

5 How many times did you ride in the past week?

- once, or one round-trip
- 2-3 round-trips
- 4-5 round-trips
- 6 or more round-trips

6 What was the purpose of *those* trips? (Write in number of trips, to total answer in #5)

- _____ Home
- _____ Work
- _____ School
- _____ Doctor
- _____ Clinic
- _____ Store
- _____ Friend/Relative's House
- _____ Other

7 Have you ever ridden on [name of paratransit service]? Yes No

Thank you very much for your time and thank you for using [Transit Authority Name].

Figure 9-1. Example of On-Board Survey of Riders With Disabilities to Evaluate Frequency of Fixed-Route Use

¹ Description of part of the service area may be something that divides the area into parts, such as north or south of a major street and east and west of another major street. Respondents could be asked what neighborhood or section they live in, if that is a good identifier. Zip codes may be useful in a large service area. Telephone exchanges can be combined with specific questions related to that part of the service area. It is too intrusive to ask a person's actual address, which they will be reluctant to give—they may then be reluctant to respond to the survey.

CHAPTER 9 EVALUATING SUCCESS

Call 1	Date:	Time:	Interviewer:	Result:
Call 2	Date:	Time:	Interviewer:	Result:
Call 3	Date:	Time:	Interviewer:	Result:

Hello, my name is _____ and [name of transit authority] is conducting a survey to ask people about their use of the service. May I ask you a few questions about [name of transit authority]?

1. First, we want to talk to people from all over town, so do you live [description of part of service area]? Yes No
2. Do you live [description of part of service area]? Yes No
3. Have you ever ridden on [name of transit authority]? Yes No
4. [If yes to Question 3] When was the last time that you rode on [name of transit authority]? _____
5. [If yes to Question 3] What kind of place do you travel to on [name of transit authority]? (Read list if necessary)
 - Home
 - Work
 - School
 - Doctor
 - Clinic
 - Store
 - Friend/Relative's House
 - Other (write in) _____
6. Approximately how many times each week do you ride the bus? (Is that how many round-trips?) _____
7. [If Answer to Question 6 is 1 or more times] How many times did you ride in the past week?
 - once, or one round-trip
 - 2-3 round-trips
 - 4-5 round-trips
 - 6 or more round-trips
8. What was the purpose of your trips? (write in number of trips, to total answer in #7)
 - _____ Home
 - _____ Work
 - _____ School
 - _____ Doctor
 - _____ Clinic
 - _____ Store
 - _____ Friend/Relative's House
 - _____ Other

Thank you very much for your time and thank you for using [Transit Authority Name].

Figure 9-2. Telephone Survey of Paratransit Riders to Evaluate Frequency of Fixed-Route Use

CHAPTER 9 EVALUATING SUCCESS

Call 1	Date:	Time:	Interviewer:	Result:
Call 2	Date:	Time:	Interviewer:	Result:
Call 3	Date:	Time:	Interviewer:	Result:

Hello, my name is _____ and I'm calling for [Transit Authority Name]. In order to understand how many people with disabilities use fixed-route services, we are conducting a brief survey of people in the community. Your telephone number was selected at random to represent people in your area and we would appreciate your help. May I speak to the head of the household? *[If head of household is not available, ask to speak to any member of the household 16 years of age or older.]*

1. Does anyone in your household, 16 years of age or older, have difficulty using regular public transportation due to a physical, mental or other health condition?

 Yes *[go to question #2]*
 No *[terminate - using closing statement below in Figure 9-5]*
2. Which members of your household have difficulty using regular public transportation? *[List below - accept name or relationship to respondent]*
3. Is this person (Are these people) able to travel outside of your home? *[Record responses below]*

Name or relationship	Able to travel
1.	<input type="checkbox"/> Yes <input type="checkbox"/> No
2.	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.	<input type="checkbox"/> Yes <input type="checkbox"/> No

[If all persons listed above are unable to travel, terminate using closing statement below in Figure 9-5.]

Total # of people with a disability who are able to travel	
--	--

4. *[If not speaking with person #1 in Question 3] May I please speak with [name or relationship for first person in # 3. If he or she is unable to respond, ask for care giver.]*

[Complete a separate questionnaire for each person.]

5. Which of the following conditions make it difficult for you to use public transportation. Please answer yes or no after each condition I mention. *[Read list and record responses below.]*

Difficulty walking, standing, sitting, or going up and down stairs	<input type="checkbox"/> Yes <input type="checkbox"/> No
Difficulty using hands or arms	<input type="checkbox"/> Yes <input type="checkbox"/> No
Difficulty seeing (even with glasses)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Difficulty hearing (even with a hearing aid)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Difficulty understanding or interacting with people	<input type="checkbox"/> Yes <input type="checkbox"/> No

Figure 9-3. Telephone Survey Screening Questions

Any other condition which makes it difficult to travel unassisted. Please describe.	<input type="checkbox"/> Yes <input type="checkbox"/> No

6. Have you had this condition for 6 months or longer?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Do you have these difficulties year round or only during winter months due to cold weather or snow?	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Do you need the assistance of another person to travel?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Do you need any special equipment or assistance to travel such as a cane, braces, or a service animal? If yes, what is it you need?	<input type="checkbox"/> Wheelchair <input type="checkbox"/> Cane, crutches, or walker <input type="checkbox"/> Braces <input type="checkbox"/> Artificial limb <input type="checkbox"/> Service animal <input type="checkbox"/> Scooter <input type="checkbox"/> Other <input type="checkbox"/> _____ <input type="checkbox"/> No special equipment
<p>I would like to ask you some questions about [Transit Authority Name]. Your answers and any information which would permit identification of you or your household will be regarded as strictly confidential.</p>	
<p>[At this point continue with full set of survey questions with screened respondents.]</p>	

Figure 9-3. Telephone Survey Screening Questions (Concluded)

SURVEYS OF THE GENERAL PUBLIC

The opinions of general public riders are also important to evaluate the success of a program. Use surveys to evaluate the visibility and impact of a mass marketing campaign. The success of a driver training program can be observed by any riders on the vehicle. Measure the perceptions of driver performance through surveys of riders over the telephone or on board the vehicles. All riders should be able to observe that riders with disabilities receive the assistance and courtesy they require to use fixed-route.

Figure 9-4 shows sample questions for a telephone survey of the general public regarding the effectiveness of a marketing campaign. Figure 9-5 shows sample questions for a telephone survey of the general public regarding the effectiveness of driver training. Figure 9-6 shows sample questions for an on-board survey of the general public to evaluate services for people with disabilities.

CHAPTER 9 EVALUATING SUCCESS

Call 1	Date:	Time:	Interviewer:	Result:
Call 2	Date:	Time:	Interviewer:	Result:
Call 3	Date:	Time:	Interviewer:	Result:

Hello, my name is _____ and [name of transit authority] is conducting a survey to ask people about their use of the service. May I ask you a few questions about [name of transit authority]?

1. First, we want to talk to people from all over town, so do you live [description of part of service area]? Yes No
2. Do you live [description of part of service area]? Yes No
3. Have you ever ridden on [name of transit authority]? Yes No
4. [If yes to Question 3] When was the last time you rode on [name of transit authority]? _____
5. Approximately how many times each week do you ride the bus? (Is that how many round-trips?) _____ round-trips
6. Have you seen or heard our new advertising campaign, [Description of the new campaign or slogan] Yes No
7. Where did you see or hear it? [Check all that are mentioned]
 - Television
 - Radio
 - Newspaper
 - Billboards
 - Bus and bus shelter ads
 - Other
8. On a scale of 1 to 10, with 10 being excellent and 1 being poor, how memorable would you say the campaign is? [Write in response] _____
9. On a scale of 1 to 10, how well do you think the campaign encourages people to ride [name of transit authority]? [Write in response] _____
10. On a scale of 1 to 10, how well do you think the campaign portrays [name of transit authority] as an enjoyable way to travel? [Write in response] _____
11. Please name the one thing that you remember most about the advertisements you saw or heard? [Write in response] _____

Thank you very much for your time and thank you for using [Transit Authority Name].

Figure 9-4. Telephone Survey of General Public to Evaluate Marketing Campaign

CHAPTER 9 EVALUATING SUCCESS

Call 1	Date	Time	Interviewer	Result
Call 2	Date	Time	Interviewer	Result
Call 3	Date	Time	Interviewer	Result

Hello, my name is _____ and [name of transit authority] is conducting a survey to ask people about their use of the service. May I ask you a few questions about [name of transit authority]?

- 1 First, we want to talk to people from all over town, so do you live [description of part of service area]? Yes No
- 2 Do you live [description of part of service area]? Yes No
- 3 Have you ever ridden on [name of transit authority]? Yes No
- 4 [If yes to Question 3] When was the last time that you rode on [name of transit authority]? _____
- 5 Approximately how many times each week do you ride the bus? (Is that how many round trips?) _____

I would like you to tell me whether you strongly agree, agree, disagree, or strongly disagree with the following statements

- 6 Drivers are courteous and friendly [Read responses, if necessary] Strongly agree
 Agree
 Disagree
 Strongly disagree
- 7 Drivers drive safely Strongly agree
 Agree
 Disagree
 Strongly disagree
- 8 Drivers understand the needs of people with disabilities Strongly agree
 Agree
 Disagree
 Strongly disagree
- 9 Drivers do not complain when they provide assistance to people with disabilities Strongly agree
 Agree
 Disagree
 Strongly disagree
- 10 Drivers announce stops on the bus routes throughout the trip Strongly agree
 Agree
 Disagree
 Strongly disagree

Thank you very much for your time and thank you for using [Transit Authority Name]

Figure 9-5. Telephone Survey of General Public to Evaluate Driver Training Program

Date:	Time:	Interviewer:
Vehicle #:	Tour #:	Survey #: (on vehicle today)
<p>Hello, my name is _____ and [name of transit authority] is conducting a survey to ask people about their use of the service. May I ask you a few questions while we're riding?</p>		
<p>1. First, we want to talk to people from all over town, so do you live [description of part of service area]?</p> <p>2. Do you live [description of part of service area]?</p> <p>3. What kind of place are you traveling to now? [Read list if necessary]</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> School <input type="checkbox"/> Doctor <input type="checkbox"/> Clinic <input type="checkbox"/> Store <input type="checkbox"/> Friend/Relative's House <input type="checkbox"/> Other (write in)</p> <p>_____</p>	<p>_____</p>
<p>4. Approximately how many times each week do you ride the bus? (Is that how many round-trips?)</p>	<p>_____</p> <p>round-trips</p>	<p>_____</p>
<p>5. When you ride, have you ever seen a person with a disability boarding the bus?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>_____</p>
<p>6. [If yes to Question 5] Thinking of the last time a person with a disability boarded the bus, did the driver assist the rider?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>_____</p>
<p>7. What kind of assistance did the driver provide? [Write in response]</p> <p>_____</p> <p>_____</p>	<p>_____</p>	<p>_____</p>
<p>8. On a scale of 1 to 10, with 10 being excellent and 1 being poor, how well would you say the driver assisted the rider? [Write in response]</p>	<p>_____</p>	<p>_____</p>
<p>9. On a scale of 1 to 10, how much easier do you think the driver made the trip for the rider? [Write in response]</p>	<p>_____</p>	<p>_____</p>
<p>Thank you very much for your time and thank you for using [Transit Authority Name].</p>		

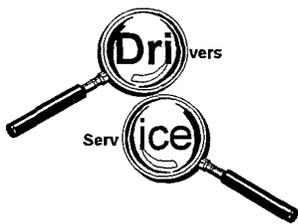
Figure 9-6. On-Board Survey of General Public to Evaluate Service for People With Disabilities

Sample Size

Select the size of the sample, or the number of responses that are required, in relation to the entire target group, carefully. The sample needs to be large enough so that the responses can be considered representative of the opinions of all the members of the target group or population. The larger the sample size, the more likely the sample is representative. Sample size should be as large as possible and large enough to ensure accuracy. The more diverse the population is, in terms of sex, race, income, age, etc., the larger the sample should be. This is particularly true if the research is going to make conclusions about the subgroups through stratification.

If the population is very uniform, then a large sample size is not as important. If the results of the survey are going to be the basis of a high-risk decision, then the accuracy is very important and the sample needs to be as large as possible. If, on the other hand, the results are related to lower risk decisions, or will be one component of a large amount of information, then a large sample size is not as important.

Table 9-2 shows some recommendations for sample sizes, depending on the target population size and how reliable the data will be. Figure 9-7 provides an explanation of how to determine sample size using Table 9-2.



SERVICE OBSERVATION

The third method to measure a program's success is to observe service being delivered and determine whether the objectives of the program are being achieved. This is most appropriate for programs in driver training and passenger (travel) training. However, some aspects of system accessibility, transit stop location, and system marketing can be measured through service observation.

Table 9-2. Recommendations for Sample Sizes

SAMPLING PARAMETERS	SIZE OF POPULATION					
Estimate, Accuracy, Reliability	500	1,000	2,500	5,000	50,000	500,000
Est 1.0%, Acc ± 1.0%, Rel 90%	174	211	242	254	266	268
Est 1.0%, Acc ± 1.0%, Rel 95%	216	276	330	353	377	380
Est 2.5%, Acc ± 1.0%, Rel 90%	284	397	522	583	651	689
Est 2.5%, Acc ± 1.0%, Rel 95%	326	484	381	798	919	935
Est 10%, Acc ± 3.5%, Rel 90%	142	166	184	191	198	199
Est 10%, Acc ± 3.5%, Rel 95%	180	220	254	267	281	282
Est 10%, Acc ± 5.0%, Rel 90%	82	89	94	96	97	97
Est 10%, Acc ± 5.0%, Rel 95%	108	121	131	135	138	138
Est 35%, Acc ± 3.5%, Rel 90%	251	334	418	457	498	502
Est 35%, Acc ± 3.5%, Rel 95%	294	416	555	624	703	712
Est 35%, Acc ± 5.0%, Rel 90%	165	198	224	235	245	246
Est 35%, Acc ± 5.0%, Rel 95%	206	259	307	327	347	349
Est 35%, Acc ± 10%, Rel 90%	55	58	60	61	61	62
Est 35%, Acc ± 10%, Rel 95%	74	80	84	86	87	87
Est 45%, Acc ± 3.5%, Rel 90%	261	353	449	493	541	546
Est 45%, Acc ± 3.5%, Rel 95%	304	437	592	672	764	775
Est 45%, Acc ± 5.0%, Rel 90%	174	211	242	254	266	268
Est 45%, Acc ± 5.0%, Rel 95%	216	276	330	353	377	380
Est 45%, Acc ± 10%, Rel 90%	59	63	65	66	67	67
Est 45%, Acc ± 10%, Rel 95%	80	87	92	93	93	95

DETERMINING THE SAMPLE SIZE FOR A SURVEY

Suppose that your agency thinks that 35% of the population of your community rides public transit more than once a week. You desire to sample the community to determine the actual percentage of the community which travels on the bus. You need to determine a sample size for the survey. You live in a community of 50,000 persons. You want to come up with an answer through sampling that should be within $\pm 5\%$ of the "real" answer with a reliability of 95%.

Size of population	50,000
Frequency estimate	35%
Desired accuracy	$\pm 5\%$ (Margin of error)
Reliability	95%

Table 9-2 indicates that you should complete 347 surveys from persons randomly selected from the population to achieve this level of accuracy and reliability.

INTERPOLATING FROM THE TABLE

Suppose you complete the survey, and the results indicate that 44% of the population ride the bus. You are in a bit of a quandary because you expected an answer in the range of $35\% \pm 5\%$, i.e. in the range 30% to 40%. This response is out of the expected range. You wonder whether your expected range was too conservative and there are actually more riders than you anticipated.

Checking Table 9-2 again, you see that if 377 surveys (rather than 347) had been conducted, and an answer of 44% had resulted, you could have concluded that the "real" answer was in the range of $45\% \pm 5\%$, with **95%** certainty. You also see that if you had conducted only 266 surveys (rather than 347), and an answer of 44% had been obtained, you could have stated that the "real" answer was in the range of $45\% \pm 5\%$, with **90%** certainty.

With these facts in mind, you might decide to continue the surveying effort until you complete 377 surveys and are again within a known range of reliability. Alternatively, you might decide to **interpolate** to estimate the reliability value for this sample, which lies somewhere between 90% and 95%. A **linear** interpolation yields the answer of 93.6% certainty, which conservatively should be viewed as a 93% certainty level.

This example illustrates that it is possible to interpolate within the values in Table 9-2 to arrive at the desired sample size. When the estimate, accuracy, and reliability are known, you may interpolate across a horizontal row to determine the sample size for any intermediate population size. Likewise, when the population size is known, you may interpolate down any vertical column to determine the sample size for intermediate values of estimate, accuracy, or reliability.

Figure 9-7. Determining the Sample Size for a Survey.

The three basic steps to implementing a service observation program are to define the program objectives to be measured, develop observation procedures and observe service, and analyze the observations.

Define Objectives to Be Measured

Depending on which program is being evaluated, define the objectives that will be measured through the observation of service.

Possible objectives for a driver training program include the following:

- Improved driver courtesy,
- Positive driver attitude toward people with disabilities,
- Increased driver ability to assist passengers with disabilities,
- Frequent stop announcements,
- Effective driver efforts to communicate, and
- Efficient driver use of securement systems.

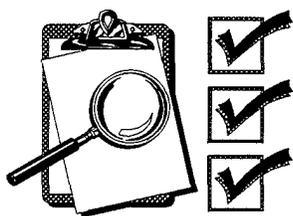
Possible objectives for a travel training program include the following:

- Increased passenger familiarity with service procedures,
- Improved passenger capabilities with lift and securement,
- Observed high passenger comfort level, and
- Increased use of discount fares and passes.

For a stop location program, a transit system may want to examine changes in patterns of boarding and deboarding.

For a system accessibility program, a transit system may want to achieve more frequent use of accessibility equipment.

For each objective, determine the observable aspects that can be measured. For example, for driver courtesy, observe drivers when passengers board, to be sure drivers are following the procedures for proper courtesy. In the same way, observe driver responses to the assistance needs of people with disabilities. Determine the stops and cross streets that drivers are required to announce and observe to be sure the drivers are following the proper procedures.



Forms help ensure that observations are consistent.

Develop Observation Procedures

Procedures for observing service include methods and forms for recording observations, methods to achieve an appropriate sample, and methods to ensure anonymous observation of actual service.

Methods and Forms for Recording Observations

To accurately analyze any service observations and to come to appropriate conclusions, institute procedures so that each observer, whether a volunteer or a staff person, is looking for the same types of behaviors and can recognize them. Determine distinct standards for the program to be measured, define how they can be observed, and provide each observer with a standardized tool for recording the observations.

Figure 9-8 shows a sample form for evaluating some specific components of a driver training program.

Appropriate Sample

To obtain an appropriate sample, be sure to observe on a variety of routes that represent the types of services provided across the service area. If there is a combination of commuter service and other types of service, be sure to observe on commuter routes as well as other routes. Observe service during the peak and off-peak hours. Include observations during the evening service hours as well.

If not all routes include accessible vehicles, concentrate on those routes that are accessible or partially accessible. Include observations on boardings from accessible bus stops and bus stops that have not been upgraded.

An efficient procedure is to have observers ride on the route and get off at various stops, then board the next bus to observe the driver on the next vehicle. This works well if the headways are not overly long. The time waiting for the next vehicle can be devoted to recording additional observations and organizing forms and procedures for the next route segment.

Segment #:	End Time:	Route #:
Date:	Start Stop:	Driver:
Start Time:	End Stop:	Vehicle #:

Use a separate form for each route segment observed.

Observation of rider #1

Time a person with a disability boarded the vehicle. _____

Did the rider use the lift? Yes No

1. Describe observed impairment.

2. Describe observed driver attitude.

Rank the driver according to the scale below on the following items.

1	2	3	4	5	6	7	8	9	10
Poor		Fair		Average		Good		Excellent	

3. How courteous was the driver to the rider? _____
 Not applicable

4. How well was the driver able to assist the passenger with a disability? _____
 Not applicable

5. How well did the driver make all the required stop announcements (refer to route list)? _____
 Not applicable

6. How well did the driver make efforts to communicate with the passenger with a disability? _____
 Not applicable

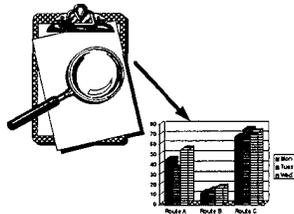
7. How efficient was the driver in working with the securement system? _____
 Not applicable

Figure 9-8. Evaluation Form for Service Observation to Evaluate Driver Training Program

Methods to Ensure Anonymity

If observers board the vehicle and begin questioning the driver, the driver will know that he or she is being observed and evaluated and may behave differently than at other times. Drivers must not know that they are being observed. Some procedures to ensure observer anonymity are as follows:

- Use observers from outside the agency, including volunteers and regular riders. Driver supervisors, trainers, and management staff will most likely be recognizable to drivers and may affect their behavior.
- Develop procedures that make it less obvious that the observers are evaluating. Avoid coming on board with a clipboard and writing down everything the driver does.
- Condense observation recording forms onto index cards or other forms that make it easier to record observations without being obvious.
- Record observations on a dictation-size tape recorder. The driver would be unlikely to be able to hear the comments and the observer may appear to be a professional working while riding the bus.
- Devote some thought to the appearance of the observers. Transit system logos on clothes may be noticed by the drivers. It is best if observers fit in among the other riders — they should be dressed for the office on commuter routes, dressed as tourists on the weekends, and so forth.
- Observers should try to sit near the driver so they can evaluate without moving around, but they should not be so near as to be obvious.



Analyze the Results

Analyze the results to determine how well the objectives have been met, particularly for target-specific areas. There may be specific topics of driver training which require more attention. There may be specific routes or parts of the service area in which drivers are less able to work with people with disabilities, perhaps because fewer people with disabilities ride those routes. Specific drivers or vehicles may pose difficulties for people with disabilities. Problems may occur more frequently during certain times of the day, due to peak capacity or due to an increased number of people with disabilities on the vehicles for whatever reasons.

Cross-tabulate the results to answer specific research questions. Based on the form shown in Figure 9-8, Table 9-3 shows how different cross-tabulations of results can answer research questions. Figure 9-9 shows the results of a cross-tabulation from fictional data showing different results by time of day. From the figure, it appears that courtesy, stop announcements, and communication efforts decrease during the peak hours. An evaluation of the analysis may show that the drivers become very busy at those times and find it difficult to keep up with all the requirements. Additional training may be required.

SPECIFIC STEPS FOR EACH APPROACH

For each of the five approaches (locating stops close to passengers, training drivers, making the system accessible, teaching passengers to use the system - travel training, and marketing fixed-route services), there are specific steps that would most effectively measure the success of the program. Steps for each approach are described below.

LOCATING STOPS CLOSE TO PASSENGERS

To measure the success of a program to locate stops close to passengers, through a circulator service or shuttle service, the success of the program can be measured through passenger counts and surveys of riders.

Table 9-3. Using Cross-Tabulations to Answer Research Questions

Cross-Tabulation	Research Questions Addressed
By Date	Are there differences in service by day of the week?
	Are there differences in service between weekday and weekend service?
By Time of Day	Are there differences by time of day?
	Are there differences between peak and off-peak service?
	Are there differences among shifts?
By Bus Stop	Are there differences between route segments?
By Route	Are there differences between routes?
	Are there differences between accessible and non-accessible routes?
By Driver	Are there specific driver training needs?
	Who are drivers with good skills and attitudes?
By Vehicle	Are there difficulties with particular vehicles, such as older vehicles or vehicles with different types of equipment?
By Lift Use	Are there differences in attitudes toward people who need to board on the lift and people with other types of impairments?
By Observed Impairment	Are there differences in driver attitudes to people with different types of disabilities?

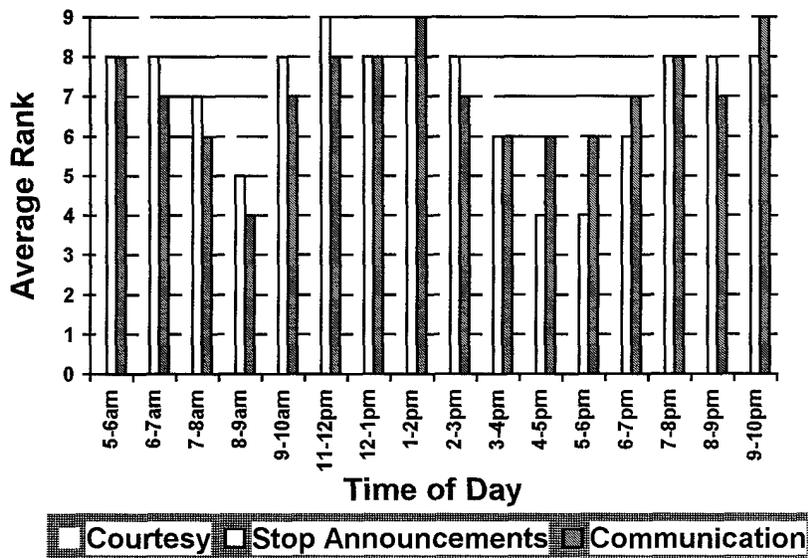


Figure 9-9. Driver Training Observations by Time of Day

Count passengers on the new routes and services.

Passenger Counts

Conduct counts of passengers on the new routes as well as on other routes that feed to the new ones or receive transfers from the new routes. The passenger counts may be of people with disabilities only, but it may be useful to count the overall number of passengers as well.

Count passengers at stops and on the specific routes that are implemented. Select sample times and compare the counts over time to determine if ridership increases. Conduct passenger counts when new routes are first implemented, then again after they have been in place for a time.

Survey riders on board the vehicles.

Rider Surveys

Take surveys of people with disabilities on board the vehicles. Include in the surveys, questions like the following:

- Did you ever ride [*name of fixed-route service*] before [*name of new service*] was implemented?
- How frequently did you ride [*name of fixed-route service*] before?
- Do you ride [*name of fixed-route service*] more frequently now that [*name of new service*] has started?
- Do you ride any other routes on [*name of fixed-route service*]? Which ones?
- Would you ride [*name of fixed-route service*] if [*name of new service*] was not available?
- How did you first learn about [*name of new service*]?

TRAINING DRIVERS

To measure the effects of driver training programs, conduct surveys and observe service.

Conduct Surveys

Survey all riders about driver performance.

Survey riders with disabilities as well as all other riders. The surveys can be conducted over the telephone or through mail-in surveys distributed at bus stops. Include questions on the

surveys which ask respondents how often they have seen drivers working with people with disabilities and what their opinions are of the service the riders received. Passengers with disabilities can also respond to questions about the service they have actually received.

Conduct surveys before a new driver training program is implemented and again after drivers are trained. Allow enough time after the training for the policies and practices of the training to become routine for the drivers. Compare the results before and after the training.

Analyze the survey results to determine if there is a pattern by time of the day, parts of the service area, or particular routes. Try to identify the cause of the variations and the solutions to identified problems. Solutions can include additional training, specific training, increased enforcement procedures, additional practice for drivers, or additional sensitivity training.

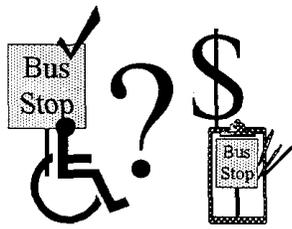
Compare the survey results on both accessible and non-accessible vehicles. Although vehicles may not have wheelchair lifts, people with disabilities may be riding. Ensure that drivers are well trained, even though they may transport relatively fewer people with disabilities than drivers on accessible vehicles.

Observe Service

Observe drivers in service.

Driver training is appropriately evaluated through observation of the service provided by drivers. Identify the objectives of the particular driver training program which is implemented. The objectives may include general sensitivity or specific skills for working with people with specific disabilities. The objectives may also include proficiency with securement systems, familiarity with mobility devices, and assisting riders to board and disembark. Analyze the training program to identify the most important objectives and include assessments of them in the service observation materials.

As for the surveys, analyze the service observation results to determine if there is a pattern of service variations and develop solutions to the problems.



Count passengers on newly accessible vehicles and at newly accessible stops.

Conduct surveys at stops and on vehicles.

PROGRAMMING ACCESSIBLE BUS STOP IMPROVEMENTS

To measure the success of a program to increase the accessibility of the fixed-route system, conduct passenger counts for people with disabilities and conduct surveys related to fixed-route use by people with disabilities.

Passenger Counts

Conduct counts of passengers with disabilities on vehicles and at stops on accessible routes. Conduct counts just after the implementation of accessible service, either by the deployment of accessible vehicles or the renovation or construction of accessible stops. Then, conduct the passenger counts 6 months to a year after the first implementation. Initially, people will not be aware of the new accessibility, but the success of the program can be measured through how many people have learned about the service and how many use it. Passenger counts can be simply the number of lift boardings or a more detailed procedure can be set up. Compare the same numbers over time to determine the success of the program.

Surveys

Survey riders with disabilities at the stops and on vehicles along the accessible routes. When asking riders about the service, ask questions about how often they use the service and how they feel about particular features of the service. Some potential questions are as follows:

- How often do you use [*name of fixed-route service*]?
- What routes do you ride?
- Do you only ride on accessible vehicles?
- Have you noticed [*name of a particular vehicle or stop feature*]?
- Does this feature help you to ride [*name of fixed-route service*]?
- Would you be able to ride [*name of fixed-route service*] without it?

TEACHING PASSENGERS TO USE THE SYSTEM

To evaluate the success of a program to teach passengers to use the system, survey people who have been taught and observe service for people with disabilities.

Surveys of Riders

Conduct follow-up surveys of riders who have been trained.

Follow up on travel training to determine if the people who participated are still using the service and how effective they feel the training was for them. Conduct training program evaluations immediately after any training takes place, either informally or formally, with those who participated. This helps in planning changes to a program and in identifying significant problems.

In addition, survey participants at regular intervals, perhaps every 6 months. Ask the participants how often they use fixed-route, whether they still use paratransit for some trips, and their opinion of the training they received. It is not necessary to survey all participants each time, but to select a sample at each interval. Some questions to include are as follows:

- How often do you ride [*name of fixed-route service*]?
- Please rate how valuable the travel training was for you.
- Would you have been able to use [*name of fixed-route service*] without the travel training?
- Is there something that you have learned since your travel training that should have been included in the training?

MARKETING THE FIXED-ROUTE SERVICES

Survey all riders about marketing effectiveness.

To evaluate the success of a marketing program, survey all riders about the effectiveness of the program. The surveys may take place on board vehicles, at stops, or over the telephone. Ask questions about the visibility of the program and whether or not the program encouraged the respondent to ride the service.

Figure 9-4 included questions for a survey to evaluate a marketing program. Include questions about particular aspects of the program, such as the features to which the most resources were devoted. Ask respondents about particular

aspects which may have been directed at people with disabilities.

CRITERIA FOR SUCCESS

There are two basic methods of determining the criteria for whether a program to attract people to fixed-route services has been a success. The first is to take measurements over time of the same standards and determine if there are changes showing that the program has had an impact. The second is to decide ahead of time what an appropriate level of a measure constitutes success. If the measure meets that level, then the program is a success. If it does not, then the program has not been a success.

Programs are affected by other programs and activities.

The difficulty with both types of criteria is that any program to attract people with disabilities to fixed-route service occurs in a variety of circumstances throughout the service area. It can be difficult to isolate the effects of the program and to measure them. For example, as part of a concerted effort to attract people from paratransit to fixed-route services, a transit system may implement a marketing campaign, an outreach or travel training program, and revisions to the eligibility determination procedures. The result may be an increase in the number of people with disabilities who use fixed-route, but the success may be attributable to the combination of efforts, rather than to one aspect.

Collect baseline measures before programs are implemented.

MEASUREMENTS OVER TIME

Measurements over time are best accomplished if the original, or baseline, measurement can occur before any programs have been implemented. Some of the baseline measures may be taken as part of the original market research, as described in Chapter 3 and the other chapters.

Take measurements consistently over time.

After the baseline measurements are taken, the same type of measures need to be consistently taken over time. For some programs, such as a driver training curriculum, annual surveys may be appropriate because it takes a certain amount of time to train all drivers and for them to learn to be comfortable and practiced with the training materials. Targeted measures, for example, surveys of residents in particular parts of the service area where additional accessible vehicles are being deployed,

Changes over time reveal the success of programs.

can be made more frequently, to measure immediate and long-term impacts of the service changes.

However the measures are taken, it is important to be consistent. Passenger counts need to be taken in the exact same way each time. Surveys need to have identical questions. Service observations need to be conducted in a consistent manner. If the measures are not consistent, then variations may cause discrepancies in the results. The results would not accurately reflect the success of the program.

As the measures are taken over time, they will reveal if additional people with disabilities have changed from paratransit to fixed-route services. The change may be attributable to a number of factors, but, if the measures are precise enough, then the contribution of specific programs can be determined. Over time, additional measures can be added to identify the effect of particular programs and of specific aspects of those programs. For example, if surveys are undertaken to measure people's perception of driver attitudes toward people with disabilities, then early surveys can ask general questions, and the later surveys can include more specific questions about some of the key training topics.

SETTING CRITERIA FOR SUCCESS

If the main purpose for a program is to attract people from paratransit services to fixed-route services, then the most objective measure is the one that would show that fewer people are using paratransit and more people with disabilities are using fixed-route services.

Decreases in paratransit ridership are not always realized.

There are two problems with achieving this measure. For most paratransit services, if some people stop riding for some or all of their trips, the capacity is easily filled with other people's rides. So, as some people take fewer rides, others take more rides, and decreases in paratransit ridership are not always realized.

Most paratransit service areas continue to experience unmet or latent demand. As paratransit space becomes available as people ride on the fixed-route, more of the latent demand can be met. While systems will not necessarily experience a decrease in paratransit ridership, they will have the opportunity to meet more demand without increasing paratransit capacity.

Not all new riders are from paratransit.

By attracting paratransit riders to fixed-route, transit systems can better satisfy the paratransit needs of riders who are unable to use the fixed-route at all. In this way, paratransit service will be more available and accessible to the people who need it, while other needs can be met on the fixed-route.

Second, although efforts to attract people with disabilities to fixed-route services may be directed toward paratransit riders, many of the new fixed-route riders may be people who never used paratransit.

Because funding is a major concern, the main question is whether the program has been successful in attracting paratransit riders from paratransit, which typically has a higher cost per trip, to fixed-route with a lower cost per trip. In addition, fixed-route services typically have a better farebox recovery ratio than paratransit. Figure 9-10 shows a method to calculate the net savings of increased boardings on fixed-route. From survey results, the number of trips that a person would have taken on paratransit instead of fixed-route can be calculated.

The calculations in Figure 9-10 are based on fictional estimates, but actual figures can be calculated from actual passenger counts and survey results. Be sure to include the appropriate questions in the surveys and service observation instruments. Other passengers than those who use wheelchairs also board the vehicles, so the number of boardings by people in wheelchairs, as used in Figure 9-10, is just one measure.

Calculation Step	Estimate	System Actual
1. Cost per paratransit trip	\$15.00	
2. Paratransit fare	\$2.00	
3. Net paratransit cost per trip	\$13.00	
4. Last year fixed-route lift boardings	200	
5. This year fixed-route lift boardings	700	
6. Increase in fixed-route lift boardings	500	
7. Estimated number of fixed-route lift boardings by paratransit riders	300	
8. Cost per fixed-route trip	\$7.00	
9. Fixed-route fare	\$1.00	
10. Net fixed-route cost per trip	\$6.00	
11. Net cost for 300 paratransit trips	\$3900.00	
12. Net cost for 300 fixed-route trips	\$1800.00	
13. Net savings for 300 trips on fixed-route instead of paratransit	\$2100.00	

Figure 9-10. Calculating Savings of Increased Boardings on Fixed-Route

The question is then whether this amount constitutes success. A net cost savings is good, but it must be compared to the cost of the program itself. A marketing campaign or a travel training program has its own costs, calculated as described in the earlier chapters. However, it is important to remember that the cost savings may be realized year after year and may well increase over time as more people become aware of services and are comfortable using them. A one-time investment in accessible vehicles can yield cost savings over the life of the vehicle. Travel training and marketing costs may decrease over time yet still increase ridership by people with disabilities.

Many systems look beyond the actual cost savings and include in their evaluation the intangible benefits of the increased mobility of people with disabilities. The intangible benefits can yield goodwill from members of the community. This, in turn, can translate into support when financial and other difficulties arise. Those benefits cannot be easily calculated.

CONCLUSIONS

This chapter has presented methodologies for surveying riders and determining the level of success of efforts to attract paratransit riders to fixed-route service. Without a substantial effort, it may not be possible to demonstrate to decision makers and funders that efforts are worth the expenditure of resources. Ultimately, the evaluation program becomes the seminal source for future improvements. In this way, evaluation is not just a wise thing to do, but imperative to future activities.