



Coordination Plan Guidebook Appendices

Step by Step Instructions for Updating and Maintaining Regional Coordinated Human Service Transportation Plans

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Table of Contents

List of Figures.....	V
List of Tables	V
Appendix A. Lead Coordination Agency–Regional Coordination Committee Organizational Member Memorandum of Understanding Template	A-1
A.1. Invitation Letter Template.....	A-1
A.2. Memorandum of Understanding Template.....	A-3
Appendix B. Example Regional Coordination Committee Mission Statement and Bylaws	B-1
B.1. Guidance for Creating Vision and Mission Statements	B-1
B.2. Template for Creating Bylaws.....	B-1
Appendix C. Regional Public Transportation Coordination Plan Organization and Checklist.....	C-1
Appendix D. Methodology to Determine Major Trip Generators.....	D-1
Appendix E. Methodology to Create a Coordination Area Map	E-1
Appendix F. Methodology to Collect and Exhibit Area Demographics.....	F-1
F.1. Definitions	F-1
F.2. Data Gathering.....	F-1
F.3. Data Display.....	F-3
Appendix G. Methodology to Create a Transit Need Index Map.....	G-1
Appendix H. Example Transportation Provider Survey	H-1
Appendix I. Transportation Service Modes and Models	I-1
I.1. Fixed-Route Transit Services.....	I-1
I.2. Demand-Responsive Transportation Services.....	I-3
I.3. Vanpool.....	I-7
I.4. Micromobility.....	I-8
I.5. Ferry Transit	I-8
I.6. Intercity Bus/Rail	I-8

Appendix J. Example Vehicle Utilization Chart	J-1
J.1. Basic Vehicle Inventory.....	J-1
J.2. Vehicle Utilization Chart.....	J-1
Appendix K. Example Goals and Strategies Matrix.....	K-1
Appendix L. Regional Public Transportation Coordination Plan	
Coordination Timeline 2025–2027	L-1
Appendix M. Coordination Planning Project Timeline	M-1
Appendix N. Coordinated Human Services Public	
Transportation Plan Development—Request for Proposals	
Template.....	N-1

List of Figures

Figure D-1. Screenshot of OnTheMap Website.....	D-1
Figure D-2. Screenshot of County Search Results.....	D-1
Figure D-3. Screenshot of Analysis Settings.	D-2
Figure D-4. Screenshot of Analysis Output.....	D-2
Figure D-5. Screenshot of Exported Analysis Results.....	D-3
Figure E-1. Screenshot of Texas Planning Map.	E-1
Figure F-1. Screenshot of the U.S. Census Bureau’s Data Portal.....	F-2
Figure F-2. Screenshot of P12: SEX BY AGE FOR SELECTED AGE CATEGORIES Selection.	F-2
Figure F-3. Screenshot of Maps Display Feature.....	F-3
Figure F-4. Screenshot of Display Selections for Older Adult Concentrations in Travis County, Texas.....	F-4
Figure F-5. Screenshot of Display Results for Older Adult Concentrations in Travis County, Texas.....	F-4
Figure G-1. Example Demographic Data for Target Populations by Block Group.	G-1
Figure G-2. Example Index Values for Target Populations by Block Group.	G-2
Figure G-3. Example Index × Weight Values for Target Populations by Block Group.	G-2
Figure G-4. Example TNI Categories for Target Populations by Block Group.	G-3
Figure I-1. Diagram of Fixed-Route Transit Service.	I-1
Figure J-1. Example Vehicle Utilization Charts for Weekdays and Weekends.	J-2

List of Tables

Table C-1. RPTCP Requirements Checklist Tool.	C-1
Table I-1. Demand-Responsive Transportation Service Types.....	I-3

Appendix A. Lead Coordination Agency– Regional Coordination Committee Organizational Member Memorandum of Understanding Template

A memorandum of understanding is a legally nonbinding document required by the Texas Department of Transportation (TxDOT) as an indication of commitment for the annual Section 5310 applications. This appendix includes templates for requesting participation in the regional coordination committee and for developing the memorandum of understanding.

A.1. Invitation Letter Template

[Your Name]
[Your Title]
[Your Organization]
[Your Address]
[City, State, ZIP Code]
[Email Address]
[Phone Number]
[Date]

[Recipient's Name]
[Recipient's Title]
[Recipient's Organization]
[Recipient's Address]
[City, State, ZIP Code]

Dear [Recipient's Name],

[If you are establishing or re-establishing your regional coordination committee, use the following two paragraphs:]

I hope this letter finds you well. My name is [Your Name], and I am writing to you on behalf of the [Lead Agency].

We are excited to announce the formation of the [Regional Coordination Committee Name], a collaborative initiative aimed at enhancing the coordination of transportation services for seniors, people with disabilities, and other transportation-disadvantaged populations in our region.

[If you are inviting an organization to join an established regional coordination committee, use the following paragraph:]

I hope this letter finds you well. My name is [Your Name], and I am writing to you on behalf of the [Lead Agency] and the [Regional Coordination Committee Name].

A primary function of a regional coordination committee is to help provide input to the regional public transportation coordination plan. This plan, which is prepared on a five-year cycle, identifies and prioritizes the unmet needs of various transportation-disadvantaged groups in our region and strategies and projects designed to reduce these unmet needs. A secondary function of the regional

coordination committee is to help promulgate the coordination of transportation services by encouraging entities within the region to apply for grants, such as TxDOT's Section 5310 program, whose funds can be used to expand the coordination of transportation services and/or provide new transportation services, that again can help reduce the gap of unmet needs.

By bringing together key stakeholders, including transportation providers, social service agencies, and advocacy groups, we aim to create a regional coordination committee whose efforts will ultimately result in a seamless network of services that will significantly improve the quality of life for seniors, individuals with disabilities, low-income riders, veterans, and other transportation-disadvantaged populations. **[Please tailor this paragraph to your region as needed.]**

We believe that the **[Recipient's Organization]** plays a crucial role in this effort. Your expertise and commitment to serving the community would be invaluable in helping us achieve our mission. As a member of the committee, you will have the opportunity to collaborate with other stakeholders and transportation providers in the region, share best practices, and contribute to the development of innovative solutions to transportation challenges.

We invite you to attend our inaugural meeting, which will be held on **[Date]** at **[Location]**. During this meeting, we will discuss the committee's objectives, outline our strategic plan, and explore opportunities for collaboration. Your participation would be greatly appreciated, and we look forward to the possibility of working together to make a positive impact on our community.

If your organization is interested in participating on the regional coordination committee, we would be asking you to make a commitment of time (i.e., your representative would be asked to attend quarterly meetings and review materials prepared by the **[Lead Agency]**). This commitment would be memorialized by completing and signing the attached memorandum of understanding.

Please RSVP by **[RSVP Date]** to confirm your attendance. If you have any questions or need further information, feel free to contact me at **[Your Email Address]** or **[Your Phone Number]**.

Thank you for considering this invitation. We are confident that, together, we can make a meaningful difference in the lives of seniors and people with disabilities.

Sincerely,

[Your Name]

[Your Title]

[Your Organization]

A.2. Memorandum of Understanding Template

[Regional Coordination Committee Name]

Mission Statement

To foster and sustain improvements in a regional and coordinated community transportation network for seniors, individuals with disabilities, individuals with low income, veterans, and other target communities in the [Planning Region Name]. [Please tailor this paragraph to your region as needed.]

Memorandum of Understanding

WHEREAS the [Region Name] includes [number of] counties: [County 1 Name, County 2 Name ...];

WHEREAS the term *community transportation* means any public transportation service or human service agency transportation service or program, whether it be provided by a public or private entity, that focuses on transportation for seniors, individuals with disabilities, individuals with low income, and other target populations such as veterans, and children;

WHEREAS there are several different community transportation services currently within the [Region Name];

WHEREAS there are significant unmet needs for individuals requiring community transportation services within the [Region Name], and these needs are anticipated to grow due to demographic trends;

WHEREAS the coordination of community transportation information and services has been shown to result in increased service through improved cost efficiency, elimination of duplication, and access to additional funding; and

WHEREAS there is a need—and an opportunity—to further coordinate the variety of community transportation options and support services within the [Region Name];

BE IT KNOWN THAT

[Organization Name] intends to participate in the establishment¹ and functioning of the [Regional Coordination Committee Name].

This memorandum of understanding documents this intent and the organizations' commitment to the primary mission of the [Regional Coordination Committee Name].

To fulfill its mission, the primary roles of the [Regional Coordination Committee Name] are to:

- Help develop, implement, and provide guidance to the community transportation coordination initiatives within the [Region Name] of Texas (TxDOT Region [Number]) so that:
 - Access and mobility improve among seniors, individuals with disabilities, individuals with low income, veterans, and other target communities who rely on community transportation.
 - Operators and sponsors of community transportation services can more effectively utilize and leverage funding to expand services to address the growing needs of these populations and areas in the region.

¹ The word *establishment* may be removed if the regional coordination committee is already functioning.

- Provide a mechanism for ongoing input from stakeholders, including users of community transportation services.
- Work together with other regional and statewide entities to help promote coordination and develop solutions to interregional community transportation needs.
- Provide input to governmental agencies and other organizations that fund/sponsor community transportation relative to policies and practices that successfully foster or that adversely affect the coordination of community transportation services/information and mobility management.

In signifying this intention and commitment, **[Organization Name]** pledges to designate one representative (and up to two alternate representatives) to the **[Regional Coordination Committee Name]** and ensure that the representative attends regularly scheduled meetings and is active in the functioning of the **[Regional Coordination Committee Name]** and subcommittees.

Either party may cancel this Memorandum of Understanding with 14 days' written notice.

IN WITNESS WHEREOF, **[Organization Name]** indicates its support and intent:

Name: _____
 Title: _____
 Organization: _____
 Signature: _____
 Date: _____
 Alternate 1 (Name): _____
 Alternate 2 (Name): _____

ACCEPTANCE BY [Regional Coordination Committee Name]:

Name: _____
 Title: _____
 Organization: _____
 Signature: _____
 Date: _____

Appendix B. Example Regional Coordination Committee Mission Statement and Bylaws

B.1. Guidance for Creating Vision and Mission Statements

It is helpful for regional coordination committees to operate under a clear and unified purpose. Crafting vision and mission statements can solidify this purpose and help guide stakeholders in the problem solving and decision-making processes later in the planning phases.

Vision Statement

A vision statement “captures what community members most value about their community, and the shared image of what they want their community to become.”¹ For regional coordination planning, this vision may involve the ultimate goal of achieving everything that a community desires. An example vision statement is as follows:

[Planning Region Name] envisions a future of seamless mobility connections for seniors, individuals with disabilities, and the general public that is affordable, easy to navigate, and accessible.

Mission Statement

The mission statement speaks to how the vision statement will be carried out. It should not be too detailed and should be pointed yet aspirational. An example mission statement is as follows:

To foster and sustain improvements in a regional and coordinated community transportation network for seniors, individuals with disabilities, individuals with low income, veterans, and other target communities in the [Planning Region Name].

B.2. Template for Creating Bylaws

Article I: Name

The name of this regional community transportation coordination committee shall be the **[Regional Coordination Committee Name]**. These bylaws shall provide the procedures for the conduct of business of the **[Regional Coordination Committee Name]**.

Article II: Purpose

Established by its founding members, the **[Regional Coordination Committee Name]** is organized to:

1. Help develop, implement, and provide guidance to community transportation² coordination initiatives within the **[Region Name]** (Texas Department of Transportation [TxDOT] Region **[Number]**) so that:

¹ <https://mrsc.org/explore-topics/officials/strategic-planning/strategic-planning>.

² For the purposes of this document, the term *community transportation* includes any public transportation service or human service agency transportation service or program provided by a public or private entity that

- a. Access and mobility improve among seniors, individuals with disabilities, individuals with low income, veterans, and other target communities who rely on community transportation.
 - b. Operators and sponsors of community transportation services can more effectively utilize and leverage funding to expand services to address the growing needs of these populations and areas in the region.
2. Provide a mechanism for ongoing input from stakeholders, including users of community transportation services.
3. Work together with other regional and statewide entities to help promote coordination and develop solutions to interregional community transportation needs.
4. Provide input to governmental agencies and other organizations that fund/sponsor community transportation relative to policies and practices that successfully foster or that adversely affect the coordination of community transportation services/information and mobility management.

Article III: Membership of the [Regional Coordination Committee Name]

III.1 Membership Eligibility Criteria

The [Regional Coordination Committee Name] shall be composed of organizational and individual members as follows:

- **Organizational members.** Organizations seeking to become members of the [Regional Coordination Committee Name] must be one of the following:
 - Any public, private, nonprofit, or for-profit organization that currently funds, arranges, or provides community transportation services to, from, or within the region.
 - Any local or regional public transportation provider or state/regional/county/municipal agency involved in the planning or provision of public/passenger transportation in the region.
 - Organizations representing groups of consumers and constituents that are impacted by the expansion, improvement, and/or coordination of community transportation services and information within the region.

Such organizations will become a member of the [Regional Coordination Committee Name] upon formal adoption of the [Regional Coordination Committee Name's] memorandum of understanding and formal acceptance by the [Regional Coordination Committee Name] members at the next regular meeting following receipt of the signed memorandum of understanding.

Each organizational member shall designate one representative and up to two alternate representatives to the [Regional Coordination Committee Name].

- **Individual members.** An individual member must be a resident of or work within the region, be a user of community transportation, and take an active interest in the [Regional Coordination Committee Name's] mission. The [Regional Coordination Committee Name] intends to include Individual members from the priority populations (seniors, individuals with disabilities, individuals with low income, veterans, and target communities).

Individual members have voting rights but do not have the right to designate an alternate.

focuses on transportation for seniors, individuals with disabilities, individuals with low income, veterans, and target communities.

The term of each individual member shall be two years. Individual members may serve a maximum of two terms (four years in total) but must reapply to be an individual member at the end of the first term. Applications to be an individual member must be submitted to the **[Regional Coordination Committee Name]** no later than **[Date]**.

The **[Regional Coordination Committee Name's]** Membership Committee will determine the process for recruiting individual members, reviewing applications, and recommending certain applicants for individual membership. The Membership Committee will also recommend the appropriate number of individual members to be voted upon at the **[Regional Coordination Committee Name's]** annual meeting in **[Date]**.

- **Ex-officio member.** A representative from TxDOT shall be an ex-officio, nonvoting member.

III.2 Rights and Responsibilities of Membership

Each member (organizational and individual) is afforded one full vote on any decision put to a vote. An organizational member's vote can be cast by their alternate representative.

Individual members must be present (virtually or in-person) at meetings to vote; proxy votes for individual members will not be permitted. Attendance at meetings can be by videoconference or teleconference.

To be in *good standing*, a member must:

1. Attend at least 75 percent of the regular meetings (in-person or virtually) and cannot miss more than two consecutive regular meetings in a calendar year. The chair may determine if a missed meeting is excused; an excused miss shall not count as nonattendance.
2. Participate in some facet of the **[Regional Coordination Committee Name's]** work program.
3. Provide funding and ridership information pertinent to the organization they represent, if applicable, to the **[Regional Coordination Committee Name]** by **[Date]** for the TxDOT planning reporting year (January 1 – December 31). This information will be presented to the **[Regional Coordination Committee Name]** members at the annual meeting in **[Date]**, where it will be approved for submittal to TxDOT by the Region **[Number]** lead agency.

Article IV: Officers of the [Regional Coordination Committee Name]

IV.1 Officers and Terms of Office

The officers of the **[Regional Coordination Committee Name]** shall include a chair and vice chair.

The term of each officer shall be two years with a term limit of two terms. In the first year, one of the two officers will have a one-year term. Thereafter, the election of officers shall alternate years.

The **[Regional Coordination Committee Name]** shall strive to achieve a balance representative of the regional geography.

IV.2 Election of Officers and Operating Year

The **[Regional Coordination Committee Name]** operating year shall begin at the annual meeting in **[Date]**.

Officers will be elected by majority vote every two years at the annual meeting.

Nominations for officers must be submitted to the **[Regional Coordination Committee Name]** no later than **[Date]**.

IV.3 Responsibilities of the Officers

The chair, or in the event of their absence, the vice chair, shall preside at all meetings of the **[Regional Coordination Committee Name]**, but neither shall be deprived of their right to vote.

The chair, or in the event of his/her absence, the vice chair, shall have the responsibility of preparing the draft agenda for each meeting.

The chair or vice chair shall have such other powers and perform such other duties as may from time to time be voted on by the **[Regional Coordination Committee Name]**. These duties will include the establishment of committees and the appointment of committee members as may be necessary or convenient for carrying out the business of the **[Regional Coordination Committee Name]**.

The vice chair shall be responsible for disseminating information to the **[Regional Coordination Committee Name]** members and writing **[Regional Coordination Committee Name]** correspondence. These duties will include distributing meeting invitations and draft agendas, keeping meeting attendance records, and taking meeting minutes. These functions may be delegated to staff supplied by the TxDOT Region **[Number]** lead agency.

The chair and vice chair must be members in good standing.

IV.4 Vacancies

If an officer vacates an office for any reason (e.g., resignation or removal), the chair (or vice chair if the vacancy is the chair) shall declare the vacancy at the next regularly scheduled meeting. The chair (or vice chair if the vacancy is the chair) can wait until the next regular meeting or may accept nominations from the floor at the meeting at which the vacancy has been declared. If nominations from the floor are accepted, voting will take place at the next regular meeting.

New officers elected will fulfill the remaining terms of the outgoing officers. This interim term will not be counted toward the two-term limit.

IV.5 Removal of Officers

Members, by a two-thirds vote of members present, may remove an officer. An officer under consideration for removal shall have the opportunity to be advised and be able to speak to the concerns of the membership. Such matters and discussions should take place in an executive session (without the public). The officer under consideration for removal must be given a 30-day period to correct any deficiencies before the vote is taken. Causes for removal include nonattendance or nonfulfillment of official duties.

Article V: Meetings of the **[Regional Coordination Committee Name]**

V.1 Regular Meetings

The **[Regional Coordination Committee Name]** shall meet at least quarterly (in January, April, July, and October) or on another date and/or at another time at the call of the chair. The **[Regional Coordination Committee Name]** may vote at a prior meeting not to hold the next regular meeting or to hold in a different month within the quarter.

If the location of these meetings varies from meeting to meeting, members present—assuming a quorum—will vote on the location of the next regular meeting. Facility locations chosen for regular meetings shall have internet access, allowing members to attend the meeting remotely. All meeting locations shall be fully accessible.

At the regular meetings, the **[Regional Coordination Committee Name]** may take such actions, pass such resolutions, or conduct such other business as are on the agenda or may otherwise be properly brought before it.

V.2 Special Meetings

The chair, or in the event of his/her absence, the vice chair may call a special meeting of the **[Regional Coordination Committee Name]** as may be required and shall call a special meeting at the request of one-third of the members. Business at special meetings shall be limited to the subjects stated in the call for them.

V.3 Informational Meetings

The chair, or in the event of his/her absence, the vice chair may call an informational meeting as may be required for the presentation and dissemination of reports, analyses, or other data, and for the informal discussion thereof by the **[Regional Coordination Committee Name]**. No formal action by the **[Regional Coordination Committee Name]** shall be taken at such meetings. Resolutions may be introduced and discussed at such meetings, but formal debate and action on such resolutions may take place only at future regular or special meetings.

V.4 Meeting Notice and Agenda

Not less than seven days' advance notice in writing of regular or informational meetings shall be given to all members. Not less than three business days' advance notice in writing of special meetings shall be given to all members. Such notices shall contain the time, place, proposed agenda, proposed resolutions on substantive matters, and the substance of any matter proposed to be voted on.

V.5 Quorum

Fifty percent of the current membership constitutes a quorum.

V.6 Structure and Conduct of Meetings

Robert's Rules of Order shall guide the structure and conduct of all meetings. Parliamentary discretion for the conduct of meetings shall be vested with the chair, or in the event of his/her absence, the vice chair. The **[Regional Coordination Committee Name's]** procedures shall provide an opportunity for all members to be heard on any given issue and for the efficient conduct of business.

V.7 Public Participation at Meetings

In-person or virtual public comments will be a recurring agenda item at each meeting. Any person is welcome to attend all regular and special meetings of the **[Regional Coordination Committee Name]** and be permitted to address the **[Regional Coordination Committee Name]** under direction from the chair, or in the event of their absence, the vice chair, who at any meeting may shift the order of public participation on the agenda as needed. The chair, or in the event of their absence, the vice chair, may establish time limits for public comment.

It will behoove organizational members to advertise the times and places of **[Regional Coordination Committee Name]** meetings and to provide information to their constituencies on how to contact the chair for public comment.

Article VI: Voting

No vote on a substantive matter shall be taken unless the issue to be voted on has been listed in the draft agenda, and timely notice (see Article V.4) has been given to all members. The election of officers and approval of individual members are considered to be substantive issues. A quorum must exist before any formal vote is taken (see Article V.5).

Each member is afforded one vote on any decision put to a vote and must be present to vote. In the absence of a voting organizational member representative, a designated alternate may cast the vote if present at the meeting. Otherwise, no proxy voting is permitted.

All decisions put to a vote require a majority vote of all members present to pass. Votes regarding changes or amendments to these bylaws (see Article VIII) and officer removals (see Article IV.4) require a two-thirds vote of all members present to pass.

Article VII: Committees of the [Regional Coordination Committee Name]

On an annual basis, the [Regional Coordination Committee Name] shall establish or continue standing committees as may be necessary or convenient for carrying out the business of the [Regional Coordination Committee Name].

Standing committees will include at least a Membership Committee, and may include, for example, a Project Committee and an Advocacy/Marketing/Public Information Committee.

New standing committees can be established if deemed necessary or convenient to conduct the business of the [Regional Coordination Committee Name]. These committees can be established upon the affirmative vote of the majority of the [Regional Coordination Committee Name] members present at a regular or special meeting.

The chair, or in his/her absence, the vice chair, may establish ad-hoc committees and appoint committee members as may be necessary or convenient for carrying out the business of the [Regional Coordination Committee Name]. Nonmembers—because of their special expertise or association with particular issues and at the discretion of the chair—may be appointed to ad-hoc committees. However, ad-hoc committees must be chaired by members of the [Regional Coordination Committee Name].

Article VIII: Amendments

These bylaws may be amended by an affirmative two-thirds vote of the [Regional Coordination Committee Name] members present at a regular meeting thereof if the notice of such meeting has contained a copy of the proposed amendment. Amendments are considered a substantive issue.

Article IX: Effective Date

These bylaws will become effective upon adoption by an affirmative two-thirds vote of the [Regional Coordination Committee Name] members present.

Appendix C. Regional Public Transportation Coordination Plan Organization and Checklist

Table C-1 contains a checklist tool to ensure that the required elements of the regional public transportation coordination plan (RPTCP) are included. The checklist tool can also be used to allocate the necessary time and resources for RPTCP development. The checklist tool follows the same chapter organization as the guidebook and the RPTCP template.

Table C-1. RPTCP Requirements Checklist Tool.

RPTCP Element	Complete
Cover page	<input type="checkbox"/>
Executive summary	<input type="checkbox"/>
Table of contents	<input type="checkbox"/>
Chapter 1. RPTCP content and organization	<input type="checkbox"/>
Stakeholder list (required and others)	<input type="checkbox"/>
Lead agency description and contact	<input type="checkbox"/>
Regional coordination committee representatives list	<input type="checkbox"/>
Memorandum of understanding and regional coordination committee structure (mission and bylaws)	<input type="checkbox"/>
Chapter 2. Public outreach and community engagement	<input type="checkbox"/>
Public outreach plan to include: <ul style="list-style-type: none"> Stakeholder identification/recruitment. Meeting locations/times. Description of feedback materials, including accessibility considerations. Public feedback on draft RPTCP. 	<input type="checkbox"/>
Documentation of stakeholder/focus group meetings to include: <ul style="list-style-type: none"> Number of meetings/addresses/dates. Attendance, including target populations. Summary of meeting outcomes, including identified needs/gaps. 	<input type="checkbox"/>
Documentation of surveys/questionnaires to include: <ul style="list-style-type: none"> Survey/questionnaire process and instrument. Number of participants. Participant demographics. 	<input type="checkbox"/>
Chapter 3. Geographic area assessment	<input type="checkbox"/>
Basic area map showing urban, small urban, rural, metropolitan planning organization, and rural transportation planning organization areas	<input type="checkbox"/>
Regional projects and strategies	<input type="checkbox"/>
Table and map showing area trip generators and a description of the methodology	<input type="checkbox"/>
Chapter 4. Demographic area assessment	<input type="checkbox"/>
Description of area demographics	<input type="checkbox"/>
Current population	<input type="checkbox"/>
Projected five-year population	<input type="checkbox"/>
Population by age group	<input type="checkbox"/>
Population by race	<input type="checkbox"/>
Number/percentage of people with disabilities	<input type="checkbox"/>
Number/percentage of low-income households (below Federal poverty level)	<input type="checkbox"/>
Percentage of population that speaks English	<input type="checkbox"/>

RPTCP Element	Complete
Chapter 5. Transportation services assessment	<input type="checkbox"/>
<p>Transportation services profiles, each to include:</p> <ul style="list-style-type: none"> • General information. • Service modes and models provided. <p>For each service provided include:</p> <ul style="list-style-type: none"> • Service policies. • Fleet inventory/utilization. • Supporting technology. • Vehicle operators/training requirements. • Ridership/service statistics. • Operating expenses/revenues (by funding source). • Perceptions of met/unmet needs. • Types of existing coordination. <p>Transportation provider profiles categorized as:</p> <ul style="list-style-type: none"> • Regional public transportation services and programs. • Municipal public transportation services and programs. • Public human service agency transportation services and programs. • Private nonprofit human service agency transportation service and programs. • Private for-profit carriers. 	<input type="checkbox"/>
<p>Mobility management services and programs, each to include:</p> <ul style="list-style-type: none"> • Driver training programs. • One-call/one-click service coordination. • Coordination services for people with disabilities or seniors. • Joint fare programs. • Funding agreements. • Educational programs. 	<input type="checkbox"/>
Chapter 6. Transportation needs and gaps assessment	<input type="checkbox"/>
Transportation needs survey in rural/urban areas	<input type="checkbox"/>
Transportation needs index and maps	<input type="checkbox"/>
Summary of area transportation needs/gaps, including methodology to identify unmet needs.	<input type="checkbox"/>
Chapter 7. Goals, strategies, and projects	<input type="checkbox"/>
<p>Documentation of goals and strategies (in a consistent format that is easy for stakeholders and the public to understand) to include:</p> <ul style="list-style-type: none"> • Goal description. • Description of needs/gaps to be addressed. • Description and prioritization of strategies to address the needs. • Implementation timeline, including action steps. • Parties responsible to support implementation. • Resources needed to implement each strategy, including: <ul style="list-style-type: none"> ○ Funding. ○ Staff time and manager. ○ Contract services. ○ Assets (e.g., buildings, vehicles, technology, other capital needs). ○ Volunteer support. • Cost estimate and funding sources. • Performance measures and targets. 	<input type="checkbox"/>
Chapter 8. Priorities	<input type="checkbox"/>
Description of prioritization/rating methodology	<input type="checkbox"/>
Documentation of priorities	<input type="checkbox"/>

RPTCP Element	Complete
Chapter 9. Plan approval	<input type="checkbox"/>
<ul style="list-style-type: none"> • Document individuals included in plan adoption (law requires inclusion of seniors; persons with disabilities; members of the general public; and representatives from public, private, and nonprofit transportation and human services providers). • Outline the steps completed for RPTCP adoption to include: <ul style="list-style-type: none"> ○ Draft RPTCP comment period, including outreach to stakeholder organizations. ○ Documentation by the lead coordination agency of all comments, requested changes, and actions taken. ○ Development of final draft RPTCP. ○ Documentation of any final revisions stemming from public comment following public notice and opportunity to provide feedback on final draft RPTCP. ○ Planning committee review of final draft RPTCP. ○ Public planning committee meeting for RPTCP adoption. ○ Planning committee signatures and participation documentation. 	<input type="checkbox"/>
Signature page	<input type="checkbox"/>
Submission of RPTCP (in Microsoft Word), including the signature page, to the Texas Department of Transportation (TxDOT)	<input type="checkbox"/>
TxDOT transmittal of approval letter to lead coordination agency or return of the RPTCP to the lead coordination agency with a list of items that must be corrected or added (i.e., missing, incomplete, or incorrect information)	<input type="checkbox"/>

Appendix D. Methodology to Determine Major Trip Generators

Employment data can be used to determine the major trip generators in a region. One of the U.S. Census Bureau's tools that utilizes employment data is called OnTheMap. The main source of data for this tool comes from the Longitudinal Employer-Household Dynamics (LEHD) program. The LEHD program combines data from “state-supplied administrative records on workers and employers with existing censuses, surveys, and other administrative records to create a longitudinal data system.”¹

The following series of steps can be followed to determine major trip generators:

1. Start by visiting the OnTheMap website (<https://onthemap.ces.census.gov/>, see Figure D-1).

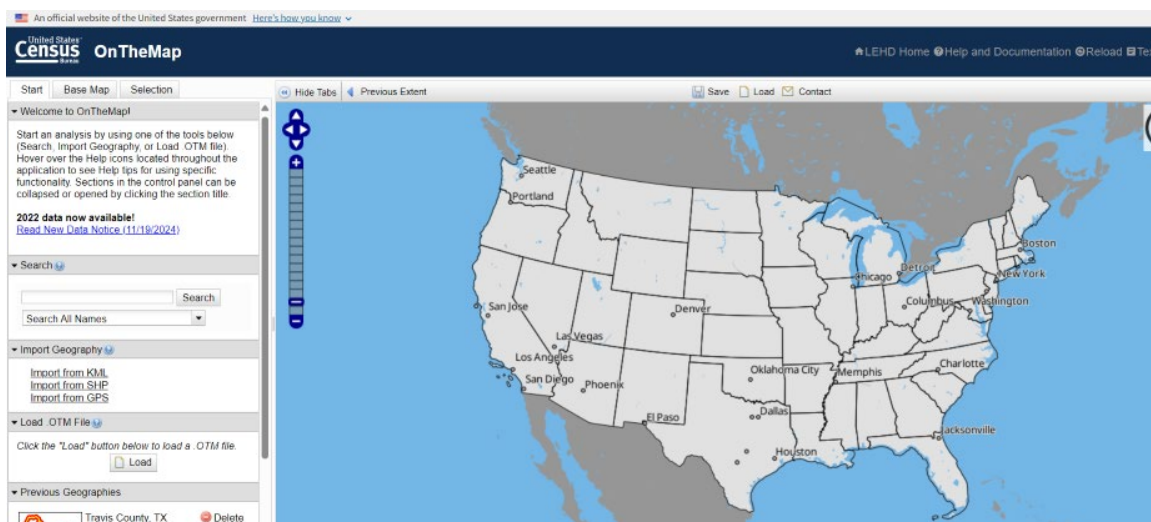


Figure D-1. Screenshot of OnTheMap Website.

2. This example considers Travis County in Texas, where the city of Austin is located.

In the search bar shown in Figure D-1, enter *Travis County* and click the Search button. Under the Counties categories, *Travis, County, TX*, will appear (see Figure D-2). Click on this entry to select it.

This process can be repeated for other counties in Texas or counties in other states as required.

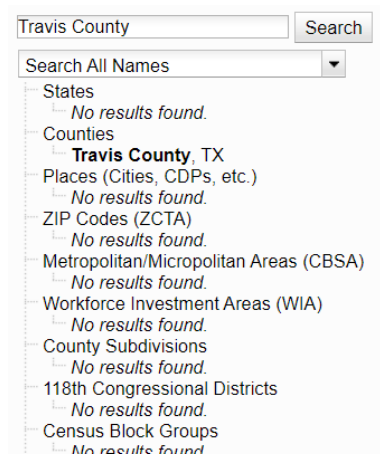


Figure D-2. Screenshot of County Search Results.

¹ <https://lehd.ces.census.gov/doc/LEDonepaper.pdf>.

- Once the county region is selected, the OnTheMap system will display various analysis options to choose from related to home/work area, analysis type, year, and job type (see Figure D-3). A work area profile for all jobs will display areas in the county with the highest concentration of employment.

Analysis Settings

Area Profile Analysis in 2022 by All Jobs

Home/Work Area ⓘ

Determines whether the selection area is analyzed on where workers live ("Home") or where workers are employed ("Work").

☐ Home

☒ Work

Analysis Type ⓘ

Determines the type of results that will be generated for the selected area.

☒ **Area Profile**

Labor Market Segment:

☐ **Area Comparison**

Areas to Compare:

Labor Market Segment:

☐ **Distance/Direction**

☐ **Destination**

Destination Type:

☐ **Inflow/Outflow**

Note: Home/Work choice does not affect results

Year ⓘ

Determines the year(s) of data that will be processed in the analysis.

☒ 2022

☐ 2021

☐ 2020

☐ 2019

☐ 2018

☐ 2017

☐ 2016

☐ 2015

☐ 2014

☐ 2013

☐ 2012

☐ 2011

☐ 2010

☐ 2009

☐ 2008

☐ 2007

Job Type ⓘ

Determines the scope of jobs that will be processed in the analysis.

☒ All Jobs

☐ Primary Jobs

☐ All Private Jobs

☐ Private Primary Jobs

Cancel

Figure D-3. Screenshot of Analysis Settings.

- Figure D-4 shows the output from this analysis. These maps can be exported as portable document format or portable network graphics files. Alternatively, the geographic data may be exported for use in Google Maps or geographic information systems software applications.

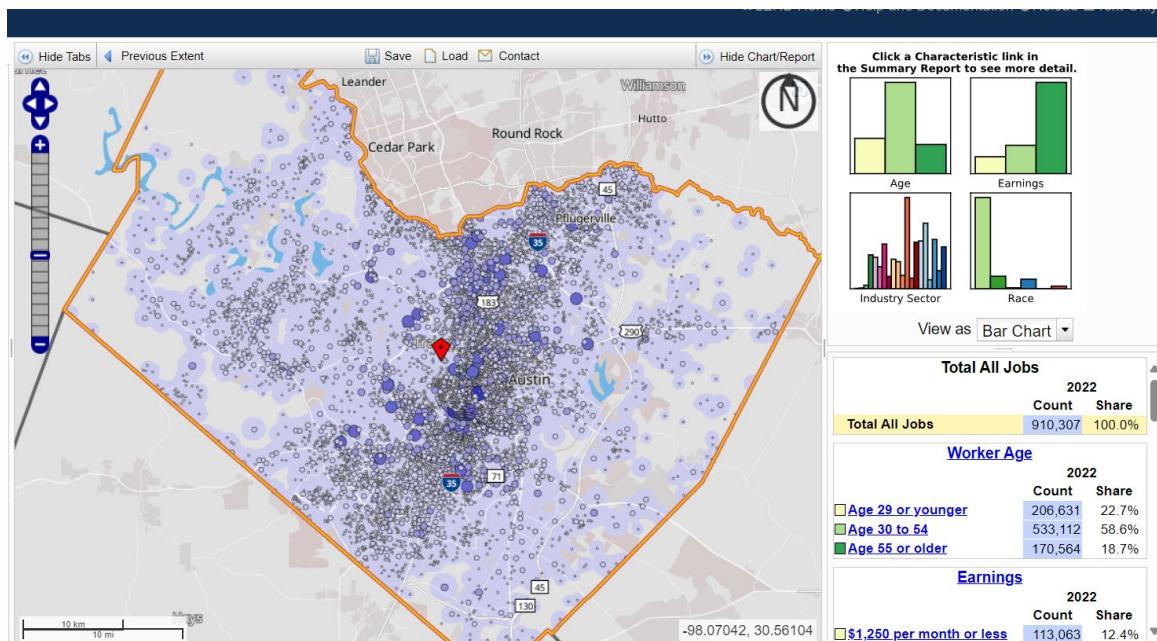


Figure D-4. Screenshot of Analysis Output.

5. Figure D-5 shows the exported analysis results from the OnTheMap website. These results can be helpful in preparing the geographic area and demographic assessments for a region.

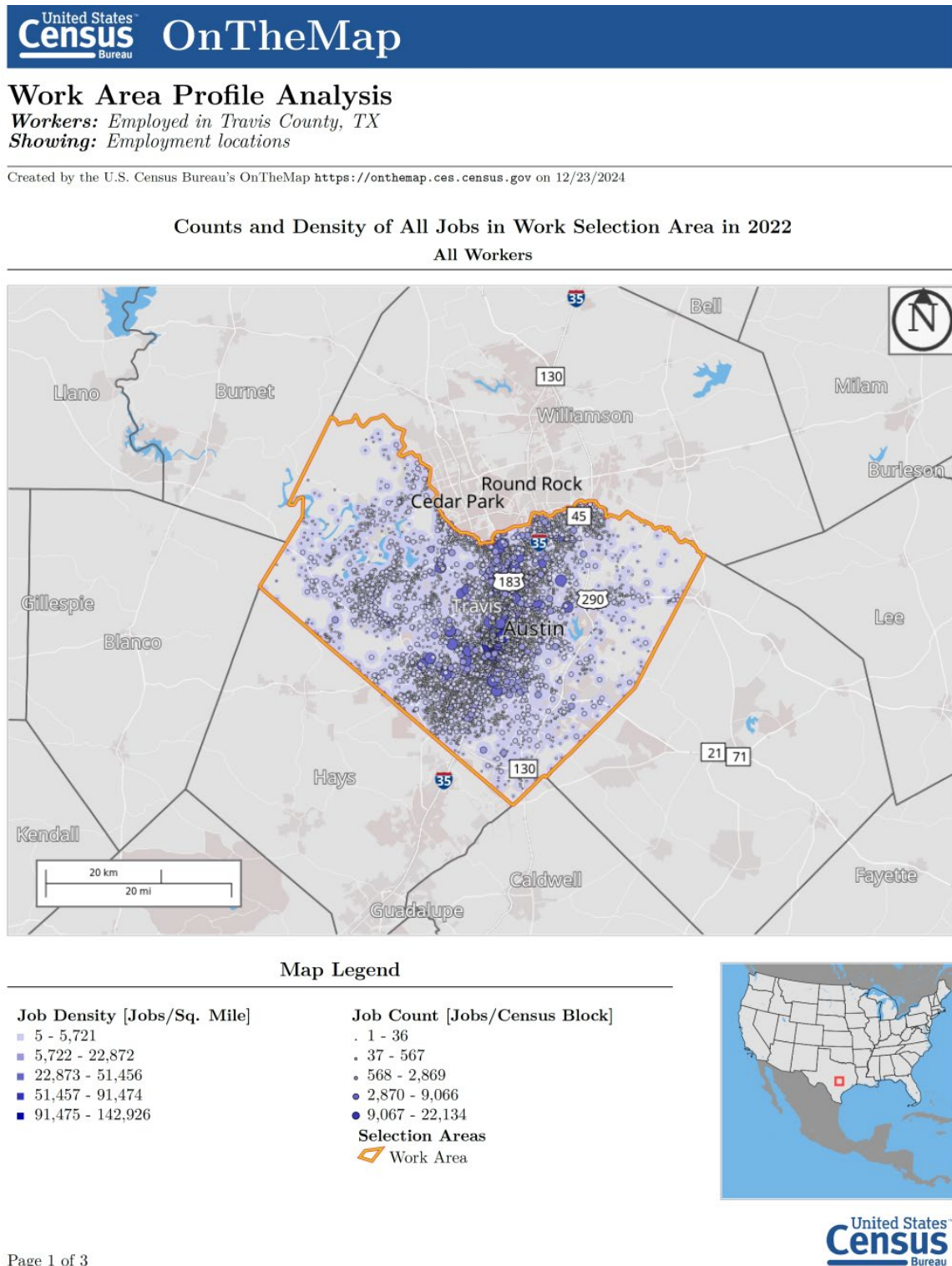


Figure D-5. Screenshot of Exported Analysis Results.

Appendix E. Methodology to Create a Coordination Area Map

The Texas A&M Transportation Institute developed a [Texas Planning Map](#) for general use by lead coordination agencies. The map contains many common geographic elements such as planning regions, urban areas, city boundaries, county boundaries, and more.

Figure E-1 shows a screenshot of the Texas Planning Map. Lead agencies can toggle layers on and off using ArcGIS online. Layers include the following:

- City boundaries.
- Census block groups.
- County boundaries.
- 2020 urbanized area boundaries.
- Transit district boundaries.
- Planning region boundaries.

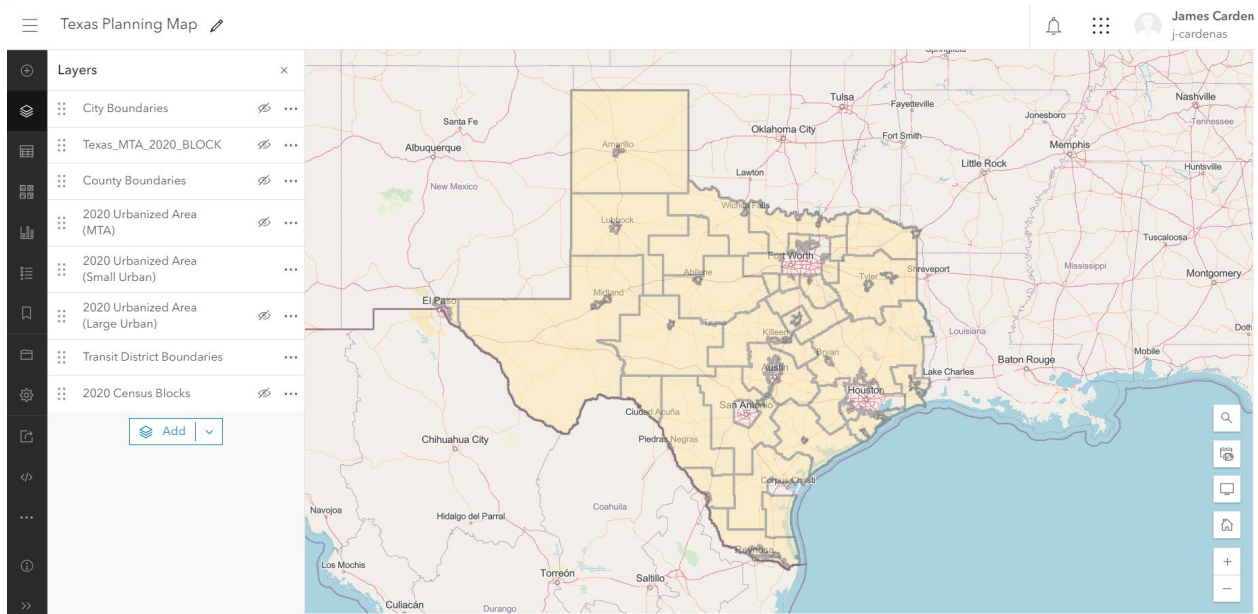


Figure E-1. Screenshot of Texas Planning Map.

Appendix F. Methodology to Collect and Exhibit Area Demographics

Area demographics are typically presented in table format. The U.S. Census Bureau's American Community Survey (ACS) is a common data resource for information on older adults, individuals with disabilities, individuals with low income, and other priority populations such as veterans or youths.

F.1. Definitions

Key terminology used to describe demographics is defined as follows:

- **Older adults (DecennialDHC2020.P12 or ACS S0101).** Older adults include adults aged 65 and older in the Federal Transit Administration (FTA) Section 5310 program or adults aged 60 and older in the Older Americans Act legislation.^{1,2}
- **Low-income (ACSDT5Y2020.B17024).** FTA defines low-income as 150 percent of the poverty line.³
- **Individuals with disabilities (ACSST5Y2020.S1810).** The ACS defines six disability types: hearing difficulty, vision difficulty, cognitive difficulty, ambulatory difficulty, self-care difficulty, and independent living difficulty. “Respondents who report anyone of the six disability types are considered to have a disability.”⁴
- **Veterans (ACS5Y2020B21001).** Veterans are defined as “men and women who have served (even for a short time), but are not currently serving, on active duty in the U.S. Army, Navy, Air Force, Marine Corps, or Coast Guard, or who served in the U.S. Merchant Marine during World War II.”⁵
- **Youth (DecennialDHC2020.P12 or ACS S0101).** Youths are typically defined as people aged 17 or younger.
- **Language spoken at home (ACS5Y2020S1601).** An indication of languages other than English spoken at home is useful for outreach and communication initiatives.
- **Populations by race and Hispanic origin (Decennial Census P9 or ACS5Y2020B203002).** The definition of race relies upon categories such as *White alone*, *Black or African American alone*, *Asian alone*, *Native Hawaiian and other Pacific Islander alone*, and *some other race alone*.

F.2. Data Gathering

The U.S. Census Bureau's data portal (<https://data.census.gov/>) is the best place to begin gathering demographic data (see Figure F-1). Here you can specify the geographies and types of attributes and data of interest.

¹ <https://www.transit.dot.gov/sites/fta.dot.gov/files/2024-10/C9070.1H-Circular-11-01-2024.pdf>.

² <https://crsreports.congress.gov/product/pdf/R/R43414>.

3 <https://www.transit.dot.gov/what-meant-%E2%80%9C9Clow-income-individual%E2%80%9D#:~:text=FTA%20encourages%20the%20use%20of%20a%20locally%20developed,of%20Health%20and%20Human%20Services%20%28HHS%29%20poverty%20guidelines.>

⁴ <https://www.census.gov/topics/health/disability/guidance/data-collection-ac.html>.

5 <https://www.census.gov/quickfacts/fact/note/US/VET605222#:~:text=Veterans%20are%20and%20women.Marine%20during%20World%20War%20II.>

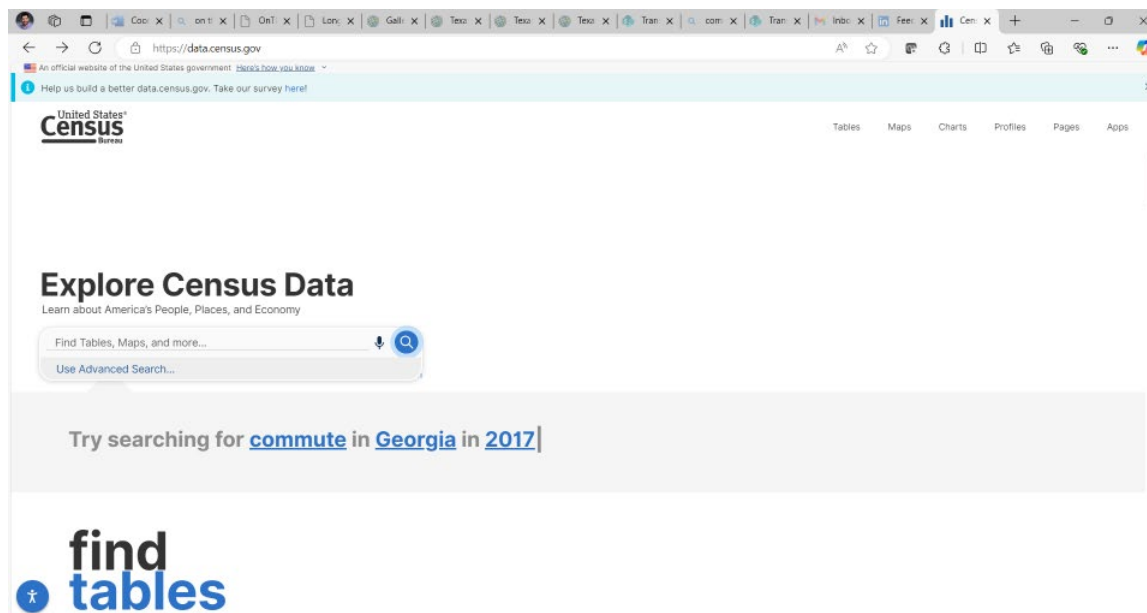


Figure F-1. Screenshot of the U.S. Census Bureau's Data Portal.

Consider an example where data on older adults are of interest. Using the Census 2020 data, begin the search by typing *P12* in the search bar. A list of table titles will appear. Select the table titled, *P12: SEX BY AGE FOR SELECTED AGE CATEGORIES* (see Figure F-2). This table summarizes population data categorized by age. These data can be further refined using the Geographies filter on the lefthand side of the screen. Note that the official Census 2020 tables require additional data calculations, such as summing the age categories.

Label	Texas
✓ Total:	29,145,505
✓ Male:	14,394,682
Under 5 years	925,595
5 to 9 years	1,023,426
10 to 14 years	1,104,663
15 to 17 years	659,866
18 and 19 years	441,124
20 years	221,601
21 years	211,290
22 to 24 years	611,277
25 to 29 years	1,033,747
30 to 34 years	1,033,151
35 to 39 years	1,014,833
40 to 44 years	934,395

Figure F-2. Screenshot of P12: SEX BY AGE FOR SELECTED AGE CATEGORIES Selection.

F.3. Data Display

To display these demographic data, the following series of steps can be followed:

1. Select the Maps option in U.S. Census Bureau's data portal (see Figure F-3). The referenced data table will be listed below the search bar and the geographic location will be displayed on the map. In this example, the entire state of Texas is displayed. However, the geography can be changed to a particular county or census tracts for greater detail.

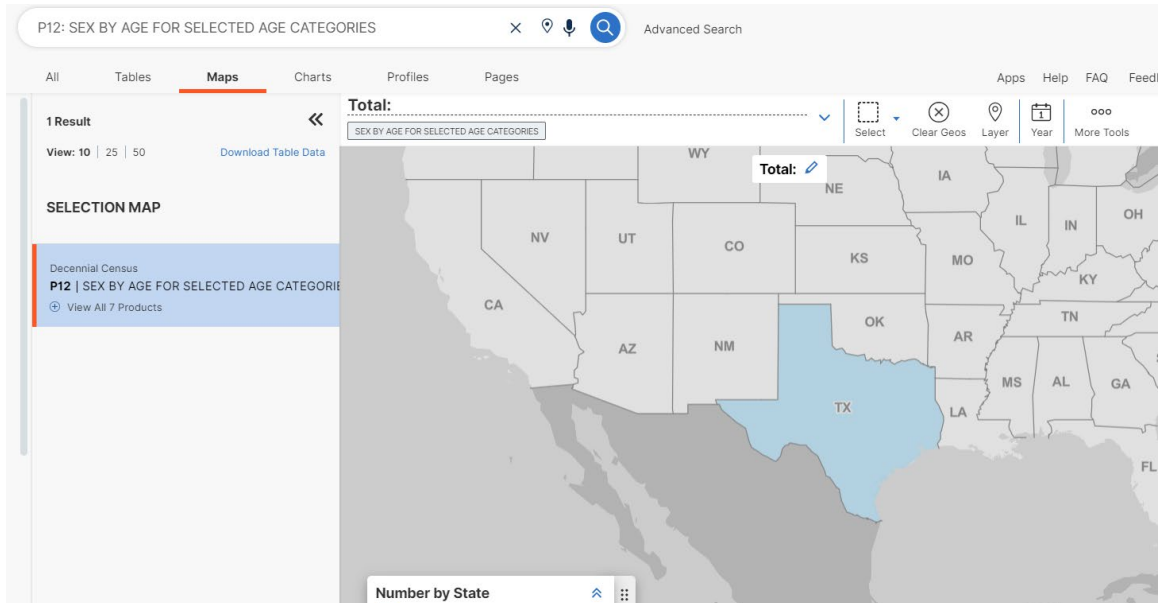


Figure F-3. Screenshot of Maps Display Feature.

2. Using the census tract geography for Travis County in Texas, select the ACS S0101 table from the SELECTION MAP menu on the lefthand side of the screen and the 65 years and over category from the drop-down menu above the map (see Figure F-4). Select % Percent at the bottom of the screen as the units (see Figure F-4).

Based on these selections, the map will then display the countywide concentrations of older adults in Travis County (see Figure F-5).

3. To export these maps from the U.S. Census Bureau's data portal, select Print from the More Tools drop-down menu in the upper righthand side of the screen. These features are helpful for creating maps to use for geographic area and demographic analyses.

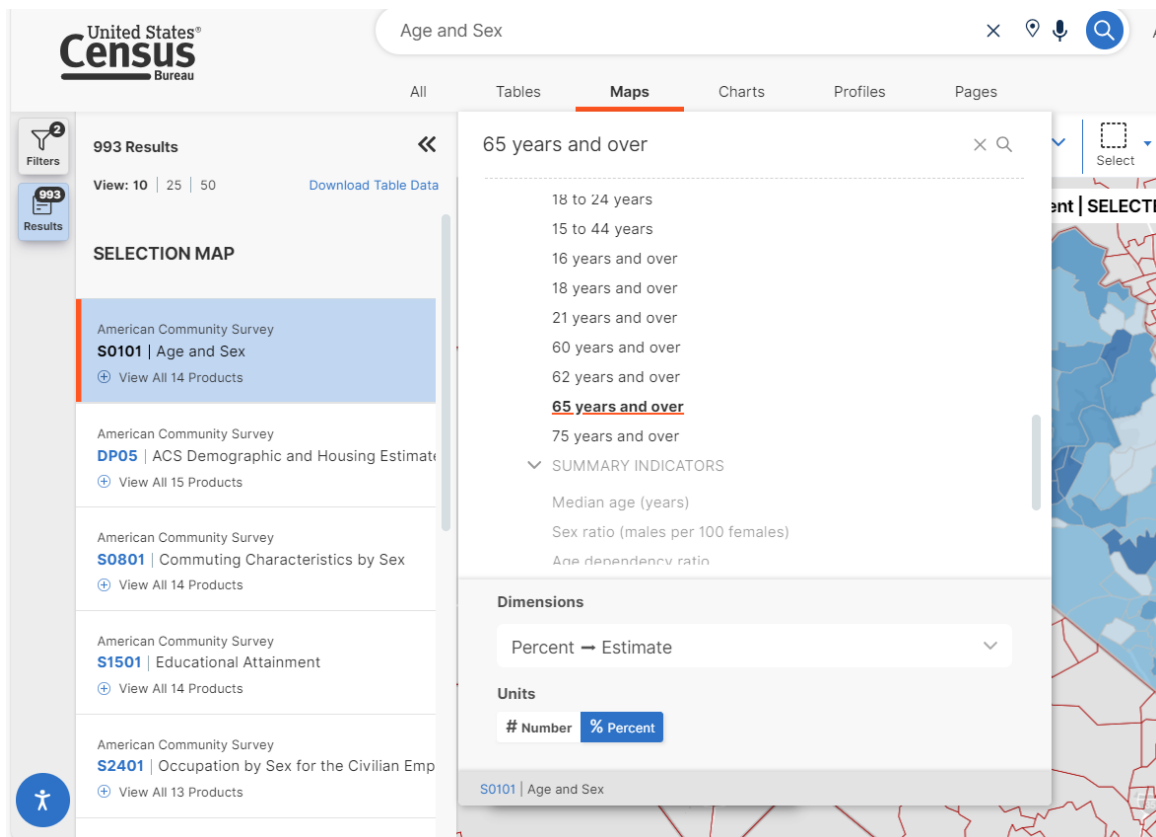


Figure F-4. Screenshot of Display Selections for Older Adult Concentrations in Travis County, Texas.

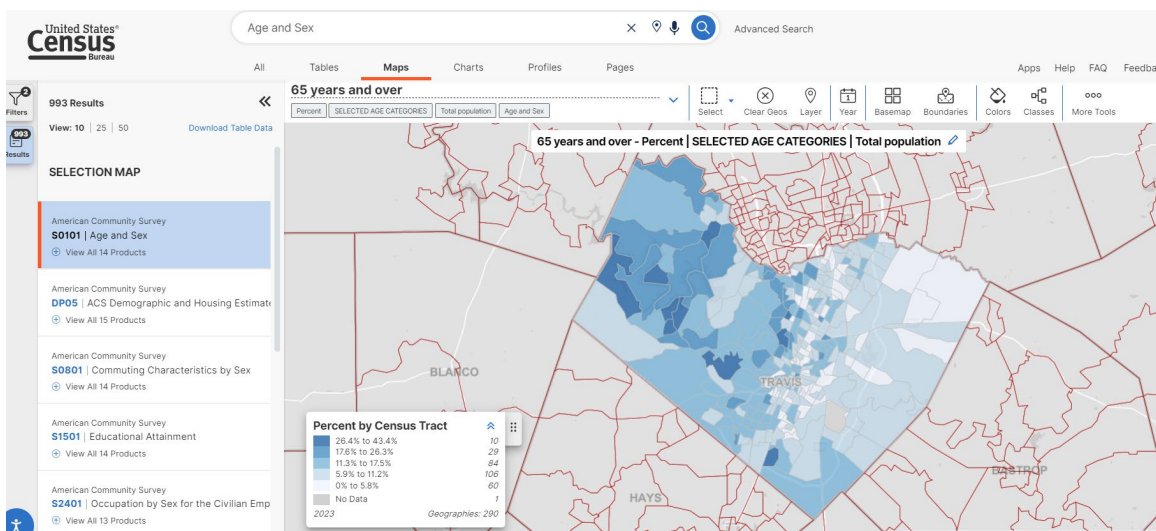


Figure F-5. Screenshot of Display Results for Older Adult Concentrations in Travis County, Texas.

Appendix G. Methodology to Create a Transit Need Index Map

The transit need index (TNI) uses layered demographic data to identify concentrations where transit needs are more pronounced. Demographic data can be weighted equally or weighted to emphasize key demographics such as older adults and individuals with disabilities. The four key demographic characteristics used to create the TNI include the following:

- **Senior population:** Defined as people aged 65 and older, seniors have a higher need for public transportation due to an increasing inability to operate an automobile without the assistance of others.
- **People with a disability:** The noninstitutionalized population with a disability have a higher need for public transportation as a result of increased numbers of individuals who do not drive or own a motor vehicle. In addition, people with a disability tend to need trips more frequently for healthcare purposes and overall have lower household incomes.
- **Population below poverty level:** Individuals below the poverty level have a higher need for public transportation due to not having the financial means of owning and maintaining a vehicle.
- **No vehicle available:** Households (also known as occupied housing units) with no vehicle available have a higher need for public transportation because residents do not have a vehicle available as a means of transportation. As a result, public transportation becomes a more likely option.

To create a TNI map, the following series of steps can be followed:

1. To begin, download the necessary data using either census tract or block group geographies. In this example, block groups were used as the designated geography. Figure G-1 shows example demographic data for the target populations by block group in a tabular format.

Weight		40			15			15			30				
		Persons with a disability			Persons in Poverty			Households with no vehicle available			Population Age 65 and Over				
Step 1	Block Group	Census2010	Index	Index x weight	Census 2010	Index	Index x weight	Census 2010	Index	Index x weight	Census 2010	Index	Index x weight	TNI Value	TNI Category
	A	17%			27%			6%			28%				
	B	15%			14%			7%			19%				
	C	24%			32%			12%			36%				
	D	8%			11%			2%			12%				
	E	11%			19%			8%			18%				
	F	28%			24%			6%			26%				
	G	13%			21%			9%			22%				
	Mean	17%			21%			7%			23%				

Standard Deviation

(more than 1.5 standard deviations above the mean)

Very high transit need ≥

(between 0.5 and 1.5 standard deviations above the mean)

High transit need ≥

(plus or minus 0.5 standard deviations from the mean)

Average transit need ≥

(between 0.5 and 1.5 standard deviations below the mean)

Low transit need ≥

(more than 1.5 standard deviations below the mean)

Very low transit need <

Figure G-1. Example Demographic Data for Target Populations by Block Group.

2. After the data are in a tabular format, the next step is to assign an index. An index can be created by utilizing a mean and the block group value (block group value/mean). Figure G-2 shows the resulting index values based on the example demographic data for the target populations by block group.

		40			15			15			30				
		Persons with a disability			Persons in Poverty			available			Population Age 65 and Over				
Step 2	Block Group	Census2010	Index	Index x weight	Census 2010	Index	Index x weight	Census 2010	Index	Index x weight	Census 2010	Index	Index x weight	TNI Value	TNI Category
	A	17%	1.0		27%	1.3		6%	0.8		28%	1.2			
	B	15%	0.9		14%	0.7		7%	1.0		19%	0.8			
	C	24%	1.4		32%	1.5		12%	1.7		36%	1.6			
	D	8%	0.5		11%	0.5		2%	0.3		12%	0.5			
	E	11%	0.7		19%	0.9		8%	1.1		18%	0.8			
	F	28%	1.7		24%	1.1		6%	0.8		26%	1.1			
	G	13%	0.8		21%	1.0		9%	1.3		22%	1.0			
	Mean	17%			21%			7%			23%				

Standard Deviation

(more than 1.5 standard deviations above the mean) **Very high transit need ≥**
 (between 0.5 and 1.5 standard deviations above the mean) **High transit need ≥**
 (plus or minus 0.5 standard deviations from the mean) **Average transit need ≥**
 (between 0.5 and 1.5 standard deviations below the mean) **Low transit need ≥**
 (more than 1.5 standard deviations below the mean) **Very low transit need <**

Figure G-2. Example Index Values for Target Populations by Block Group.

- Next, weighted index values are determined by multiplying each block group's index with each category's weight. Individuals with a disability and older adults are assigned higher weights to emphasize greater need. Figure G-3 shows the resulting index × weight values based on the example demographic data for the target populations by block group. These weighted index values are then summed across each demographic attribute at the block group level to produce a TNI value for each block group (see Figure G-3).

		40			15			15			30				
		Persons with a disability			Persons in Poverty			available			Population Age 65 and Over				
Step 3	Block Group	Census2010	Index	Index x weight	Census 2010	Index	Index x weight	Census 2010	Index	Index x weight	Census 2010	Index	Index x weight	TNI Value	TNI Category
	A	17%	1.0	41.0	27%	1.3	19.2	6%	0.8	12.6	28%	1.2	36.5	109	
	B	15%	0.9	36.2	14%	0.7	9.9	7%	1.0	14.7	19%	0.8	24.8	86	
	C	24%	1.4	57.9	32%	1.5	22.7	12%	1.7	25.2	36%	1.6	47.0	153	
	D	8%	0.5	19.3	11%	0.5	7.8	2%	0.3	4.2	12%	0.5	15.7	47	
	E	11%	0.7	26.6	19%	0.9	13.5	8%	1.1	16.8	18%	0.8	23.5	80	
	F	28%	1.7	67.6	24%	1.1	17.0	6%	0.8	12.6	26%	1.1	33.9	131	
	G	13%	0.8	31.4	21%	1.0	14.9	9%	1.3	18.9	22%	1.0	28.7	94	
	Mean	17%			21%			7%			23%				

Standard Deviation

(more than 1.5 standard deviations above the mean) **Very high transit need ≥**
 (between 0.5 and 1.5 standard deviations above the mean) **High transit need ≥**
 (plus or minus 0.5 standard deviations from the mean) **Average transit need ≥**
 (between 0.5 and 1.5 standard deviations below the mean) **Low transit need ≥**
 (more than 1.5 standard deviations below the mean) **Very low transit need <**

Figure G-3. Example Index × Weight Values for Target Populations by Block Group.

- Using the direct TNI values, relative TNI categories can be assigned based on deviations from the mean. In this example, the following categories were used:
 - Very high transit need.** More than 1.5 standard deviations from the mean.
 - High transit need.** Between 0.5 and 1.5 standard deviations from the mean.
 - Average transit need.** Plus or minus 0.5 standard deviations from the mean.
 - Low transit need.** Between 0.5 and 1.5 standard deviations below the mean.
 - Very low transit need.** More than 1.5 standard deviations below the mean.

Figure G-4 shows the resulting TNI categories based on the example demographic data for the target populations by block group.

Step 4	Weight			40			15			15			30		
				Persons with a disability			Persons in Poverty			available			Population Age 65 and Over		
	Block Group	Census2010	Index	Index x weight	Census 2010	Index	Index x weight	Census 2010	Index	Index x weight	Census 2010	Index	Index x weight	TNI Value	TNI Category
	A	17%	1.0	41.0	27%	1.3	19.2	6%	0.8	12.6	28%	1.2	36.5	109	Average
	B	15%	0.9	36.2	14%	0.7	9.9	7%	1.0	14.7	19%	0.8	24.8	86	Average
	C	24%	1.4	57.9	32%	1.5	22.7	12%	1.7	25.2	36%	1.6	47.0	153	Very High
	D	8%	0.5	19.3	11%	0.5	7.8	2%	0.3	4.2	12%	0.5	15.7	47	Very Low
	E	11%	0.7	26.6	19%	0.9	13.5	8%	1.1	16.8	18%	0.8	23.5	80	Low
	F	28%	1.7	67.6	24%	1.1	17.0	6%	0.8	12.6	26%	1.1	33.9	131	High
	G	13%	0.8	31.4	21%	1.0	14.9	9%	1.3	18.9	22%	1.0	28.7	94	Average
	Mean	17%			21%			7%			23%			100	

Standard Deviation 35		
(more than 1.5 standard deviations above the mean)	Very high transit need ≥	152
(between 0.5 and 1.5 standard deviations above the mean)	High transit need ≥	117
(plus or minus 0.5 standard deviations from the mean)	Average transit need ≥	83
(between 0.5 and 1.5 standard deviations below the mean)	Low transit need ≥	48
(more than 1.5 standard deviations below the mean)	Very low transit need <	48

Figure G-4. Example TNI Categories for Target Populations by Block Group.

- Finally, the resulting TNI category values can be mapped by joining the data table with a TigerLine shapefile in a geographic information systems application and displaying the results.

Appendix H. Example Transportation Provider Survey

[Name and Logo of Lead Coordination Agency]

Regional Public Transportation Coordination Plan Update

For the [Region Name]

Transportation Provider Survey

Regional Public Transportation Coordination Plan

The [Lead Coordination Agency Name] is the lead agency for coordinated transportation and mobility management resources in the [Region Name], including the counties of [list counties alphabetically]. One responsibility that comes with being the lead coordination agency includes preparing a regional public transportation coordination plan and updates (undertaken every five years).

The preparation of a regional public transportation coordination plan update for our region is a planning requirement for continued Section 5310 program funding, which is available from the Texas Department of Transportation (TxDOT) in regions with small urban and rural areas and from a designated organization (typically a transit agency or metropolitan planning organization) in regions with urban areas. The regional public transportation coordination plan update must focus—through coordination—on meeting the unfulfilled transportation needs of the following populations:

- Seniors.
- Individuals with disabilities.
- Low-income residents.
- Zero-car households.
- Youths.
- Residents with limited English proficiency.
- Veterans.
- Clients of workforce agencies.

Closing the service gaps for these populations is the primary goal of coordination and the Section 5310 funding program in Texas. The purpose of the regional public transportation coordination plan is to identify and prioritize coordination and mobility management projects and strategies that can be implemented with the help of funds from the Section 5310 program (or other funding programs) to expand current services or introduce new services and programs that will enhance the mobility of these target populations. **As a prerequisite, Section 5310 grant applications must reflect those projects and strategies from the regional public transportation coordination plan.**

Transportation Provider Profiles

Part of the regional public transportation coordination plan includes documenting in the plan the public, private, nonprofit, and for-profit transportation services that serve the general public and these specific populations within the region. These entities may include the following:

- Regional public transportation services and programs provided by regional public transportation providers.
- Municipal public transportation services and programs provided by county or city-based public transportation providers (these services are often sorted by subregion or county).
- Public human service agency transportation services and programs (these services are often sorted by region, county, and then municipality).
- Private nonprofit human service agency transportation service and programs (these services are also often sorted by region, county, and then municipality).
- Private for-profit brokers and carriers including taxis, transportation network companies such as Lyft and Uber, and nonemergency medical transportation (NEMT) brokers and companies.

Transportation Provider Survey

We are conducting this Transportation Provider Survey to ensure accurate and up-to-date information, so that we can more accurately assess the transportation needs of the transportation-disadvantaged populations in our region and determine which of these needs are being met and not being met. Your data are vital to understanding the availability, quality, and cost of transportation services for these populations and the general public. The regional public transportation coordination plan update will incorporate your data into an analysis of service gaps and into potential scenarios to fill those gaps.

In the end, your participation in this survey is key to our better understanding of how—and to what extent—this network is currently meeting the needs of these populations in our region and to identifying ways in which this network can more effectively or more efficiently improve mobility for these target populations.

Survey Instructions

These questions should take approximately 45 minutes to complete and may be followed with an interview from one of our staff. If you have information available in an alternative format that is similar to the information solicited in the questions, please contact **[Name and Contact Information]**.

Please complete the survey by **[Date]**. If you are unable to answer any of the questions, please pass the survey link along to someone from your organization who can, and we will compile the answers into a single dataset at the conclusion of the survey.

Thank you in advance for your time. If you have any questions or would prefer to discuss the survey questions, please call or email **[Name and Contact Information]**. If you are completing a printed version of the survey, please return the survey **[Name and Mailing Address]**. Alternatively, you can scan your completed survey and email it to **[Name and Email Address]**.

Organization Characteristics and Services Provided

A. Organization and Contact Information

1. Identification of organization:

- a. Organization name: _____
- b. Address: _____
- c. City: _____ State: _____ Zip: _____
- d. Telephone: _____ Fax: _____
- e. Name of individual responding to survey: _____
- f. Email of respondent contact: _____
- g. Title of respondent contact: _____
- h. Agency website: _____

2. Please check the box that **best** describes your organization. (*Check only one.*)

- | | |
|---|---|
| <input type="checkbox"/> a. Publicly sponsored transit agency | <input type="checkbox"/> l. NEMT provider |
| <input type="checkbox"/> b. Human service agency – public | <input type="checkbox"/> m. Independent living center |
| <input type="checkbox"/> c. Human service agency – nonprofit | <input type="checkbox"/> n. Wheelchair/stretchers service |
| <input type="checkbox"/> d. Medical center/health clinic | <input type="checkbox"/> o. Public housing |
| <input type="checkbox"/> e. Nursing home | <input type="checkbox"/> p. Transitional housing |
| <input type="checkbox"/> f. Adult day care | <input type="checkbox"/> q. Workforce development |
| <input type="checkbox"/> g. Municipal office on aging | <input type="checkbox"/> r. Local government office |
| <input type="checkbox"/> h. Nonprofit senior center | <input type="checkbox"/> s. Other (specify) _____ |
| <input type="checkbox"/> i. Faith based organization | |
| <input type="checkbox"/> j. Private nonprofit | |
| <input type="checkbox"/> k. Public nonprofit | |

3. Under what legal authority does your organization operate?

- ☐ a. Local government department or unit (city or county)
- ☐ b. Private nonprofit organization
- ☐ c. Transportation authority
- ☐ d. Private, for-profit
- ☐ e. Other (please specify): _____

4. What are the major functions/services of your organization? (*Check all that apply.*)

- | | |
|---|---|
| <input type="checkbox"/> a. Transportation | <input type="checkbox"/> k. Job placement |
| <input type="checkbox"/> b. Health care | <input type="checkbox"/> l. Residential facilities |
| <input type="checkbox"/> c. Social services | <input type="checkbox"/> m. Income assistance |
| <input type="checkbox"/> d. Nutrition | <input type="checkbox"/> n. Screening |
| <input type="checkbox"/> e. Counseling | <input type="checkbox"/> o. Information/referral |
| <input type="checkbox"/> f. Day treatment | <input type="checkbox"/> p. Recreation/social |
| <input type="checkbox"/> g. Job training | <input type="checkbox"/> q. Homemaker/chore |
| <input type="checkbox"/> h. Employment | <input type="checkbox"/> r. Housing |
| <input type="checkbox"/> i. Rehabilitation services | <input type="checkbox"/> s. Veterans' services |
| <input type="checkbox"/> j. Diagnosis/evaluation | <input type="checkbox"/> r. Other (please specify): _____ |

5. What is the geographic service area for the organization?

☐ Specific counties (please specify):

- | | |
|---------------------------------------|--|
| <input type="checkbox"/> All of _____ | <input type="checkbox"/> Parts of _____: |
| <input type="checkbox"/> All of _____ | <input type="checkbox"/> Parts of _____: |
| <input type="checkbox"/> All of _____ | <input type="checkbox"/> Parts of _____: |
| <input type="checkbox"/> All of _____ | <input type="checkbox"/> Parts of _____: |
| <input type="checkbox"/> All of _____ | <input type="checkbox"/> Parts of _____: |

☐ Specific municipalities (please specify): _____

☐ Other (please specify): _____

B. Description of Transportation and Mobility Management Services

**6. Which mode(s) of transportation service delivery best describes your transportation service(s)?
(Check all that apply.)**

- ☐ a. Fixed-route–bus
- ☐ b. Fixed-route–rail
- ☐ c. Dial-a-ride–demand response, advance reservation
- ☐ d. Taxi vouchers/user-side subsidy programs
- ☐ e. Volunteer driver program
- ☐ f. ADA complementary paratransit
- ☐ g. Flex transit (route deviation or point deviation)
- ☐ h. Microtransit–on-demand/same-day, general public
- ☐ i. Alternative services–on-demand for ADA paratransit customers
- ☐ g. Vanpool
- ☐ h. Micromobility–bike or scooter sharing
- ☐ i. Ferry transit
- ☐ j. Intercity bus/rail
- ☐ k. Other (please specify): _____

7. What statement best describes how these services are provided?

- ☐ a. We operate the service(s) with our own fleet and employee drivers.
- ☐ b. We contract out operations—a contractor operates our own fleet of vehicles.
Name of operations contractor(s): _____
- ☐ c. We contract out operations or purchase service from another provider—a contractor/provider operates their own fleet of vehicles.
Name of contractor(s)/provider(s): _____
- ☐ d. We use nondedicated providers (e.g., taxis, Lyft, Uber, NEMT carriers) for the entire service.
Name of provider(s): _____
- ☐ e. We use nondedicated providers (e.g., taxis, Lyft, Uber, NEMT carriers) for the some of the service (e.g., as overflow providers).
Name of provider(s): _____
- ☐ f. We use staff cars.
- ☐ g. We use volunteer drivers, driving their own cars.
- ☐ h. We use volunteer drivers, driving their agency vehicles.
- ☐ i. We distribute transit/paratransit passes to clients.

8. Do any other organizations purchase rides on your transportation service? (*Check one.*)

☐ Yes ☐ No

If yes, which organizations? _____

9. Does your organization provide any mobility management services for others in the community? (*Check all that apply.*)

- ☐ a. Driver training programs
- ☐ b. One-call/one-click service coordination
- ☐ c. Services for individuals with disabilities or seniors (e.g., travel training)
- ☐ d. Joint fare programs
- ☐ e. Funding agreements
- ☐ f. Educational programs
- ☐ g. Other (please specify): _____

C. Transportation Service Policies

10. Does your organization impose eligibility limitations on those people who are provided transportation? (*Check one.*)

☐ Yes ☐ No

If yes, please define the rider eligibility requirements for your transportation programs. (Please describe how these might differ for different services or programs in the Notes.)

- ☐ General public
- ☐ County or municipal residents
- ☐ Seniors age _____ and above
- ☐ Individuals with disabilities (all)
- ☐ Individuals with intellectual or developmental disabilities
- ☐ Individuals with low income/Medicaid beneficiaries
- ☐ Individuals living in zero-car households
- ☐ Youths
- ☐ Residents with limited English proficiency
- ☐ Veterans
- ☐ Clients of workforce agencies
- ☐ Other (please specify): _____

Notes: _____

11. Must individuals be precertified or prequalified to access your transit services? (*Check one.*)

☐ Yes ☐ No

If yes, what are the eligibility/qualification standards? _____

12. Does your organization impose trip purpose limitations or prioritization in scheduling/serving trips? (Check one.)

☐ Yes ☐ No

If yes, please define the trip eligibility requirements or prioritizations for your transportation programs. (Please describe how these limitations or prioritizations might differ for different services or programs in the Notes.)

- ☐ Nonemergency medical trips
☐ Work trips
☐ Day program (waiver transportation) trips
☐ Trips to our senior center/agency
☐ Other (please specify): _____

Notes: _____

13. What are the daily hours and days of operation for your transportation services? (Check days and list hours of operation in the space provided.)

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Service begins	_____	_____	_____	_____	_____	_____	_____
Service ends	_____	_____	_____	_____	_____	_____	_____

14. Does your organization charge a fare or fee to the passenger for providing transportation services? (Check one.)

☐ Yes ☐ No

If yes, what is the fare structure? _____

15. Does the organization provide any discounts for older adults, individuals with disabilities, or other categories? (Please specify other categories.) _____

☐ Yes ☐ No

If yes, what is the discount? _____

16. Does your organization accept any donations from older adults or other passengers to offset the cost of providing transportation services? (Check one.)

☐ Yes ☐ No

If yes, what is the suggested donation amount? _____

17. How do clients/customers request your transportation services?

- ☐ Phone call
☐ Internet reservation (please specify software): _____
☐ Smart phone app (please specify app): _____
☐ Arrangement by a third party (please describe): _____
☐ Customers access the service at a designated bus stop or station

18. What is your advance reservation policy? (Check one.)

- ☐ Same-day on-demand (for immediate fulfillment); no advance notice is required
- ☐ Same-day but _____ hours in advance
- ☐ 1 day before travel
- ☐ 24 hours before travel
- ☐ 2 days before travel
- ☐ 3 days before travel
- ☐ 4 days before travel
- ☐ 5 days before travel
- ☐ 1 week before travel
- ☐ Other (please specify): _____

19. How often do you have space available to accommodate last minute/late reservations? (Check one.)

- ☐ Never ☐ Rarely ☐ Sometimes ☐ Often ☐ Always

Please explain: _____

20. If you have an advance reservation policy, will you accommodate same day reservations if space is available? (Check one.)

- ☐ Yes ☐ Yes, but only for emergencies ☐ No

Please explain: _____

21. Do you accept requests for subscription service (i.e., recurring, standing orders)? (Check one.)

- ☐ Yes ☐ No

If yes, please note any specific policies related to subscription requests (e.g., minimum number of days per week): _____

22. For demand-responsive services, define the level of driver assistance provided to your riders. (Check all that apply.)

- ☐ Curb-to-curb assistance (i.e., drivers will assist passengers in and out of vehicles only)
- ☐ Door-to-door assistance (i.e., drivers will assist passengers to the entrance of their origin or destination)
- ☐ Door-thru-door assistance (i.e., drivers will go into the origin or destination entrance with the passenger)
- ☐ Personal care attendants or escorts are provide to those passengers who require such services
- ☐ Passengers are permitted to travel with their own personal care attendants or escorts
- ☐ Driver will help with a limited number of bags

D. Vehicle Inventory and Utilization

23. Please provide the following information for the vehicles used in the provision of transportation services provided directly by your agency or your contractor operating your vehicles.

Vehicle Type	Number of Vehicles				
	Total ¹	Owned	Leased	Wheelchair Accessible (Owned or Leased)	Volunteer
a. Sedans					
b. Minivans (up to 7 seats)					
c. Standard 15-passenger vans					
d. 8–14 seat vehicles (e.g., Ford Transits or Dodge ProMasters)					
e. Converted 15-passenger vans (e.g., raised roof)					
f. Light-duty bus (body-on-chassis type construction seating between 16–24 passengers)					
g. Medium duty bus (body-on-chassis type construction seating over 22 passengers with dual rear wheel axle)					
h. Medium- or heavy-duty transit bus					
i. Other (please specify): _____					

¹The number of vehicles owned and leased should sum to equal the total number of vehicles.

24. Please provide a fleet inventory for the vehicles in Question 23 (exclude volunteer vehicles).

Vehicle	Make	Model	Model Year	Maximum Seats	Maximum Wheelchair Seats	LTD Miles
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

25. Please complete the following weekday and weekend utilization charts for the vehicles in Question 23 (excluding volunteer vehicles).

Weekdays

	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Vehicle																					
1																					
2																					
3																					
4																					
5																					
6																					
7																					
8																					
9																					
10																					
11																					
12																					
13																					
14																					
15																					
16																					
17																					
18																					
19																					
20																					

Weekends (or Saturday or Sunday)

	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Vehicle																					
1																					
2																					
3																					
4																					
5																					
6																					
7																					
8																					
9																					
10																					
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17																					
18																					
19																					
20																					

E. Supporting Technology

26. For demand-responsive transportation services, what type of technology is used for booking, scheduling, and dispatching functions?

Vendor and system name: _____

27. What type of communications device/system is used between drivers and dispatchers? (Check all that apply.)

- ☐ a. Cellular phones
- ☐ b. Two-way mobile radios
- ☐ c. Mobile data terminals
- ☐ d. Tablets or smart phones
- ☐ e. Routing software
- ☐ f. Other (please specify): _____

28. Do you utilize any technology for booking, cancellations, and/or estimates times of arrival notices? (Check all that apply.)

- ☐ a. Mobile app (please specify): _____
- ☐ b. Interactive voice recognition technology (please specify): _____
- ☐ c. AI technology (please specify): _____
- ☐ d. Other (please specify): _____

F. Vehicle Operators

29. How many full-time and part-time employee drivers are used for service delivery?

- ☐ a. Full-time drivers: _____
- ☐ b. Part-time drivers: _____

30. What special training requirements must drivers complete before providing services?

Please explain: _____

31. Do part-time drivers have any additional responsibilities at your organization that would limit their availability for additional driving tasks? (Check one.)

- ☐ Yes
- ☐ No

G. Ridership and Service Statistics

32. Please provide your organization's annual passenger statistics. If possible, use data for the most recent 12-month period for which data is available. Complete questions (a) through (d).

Unduplicated Persons/Passenger Trips	Services for the General Public	Limited Eligibility Services
a. Total number of persons ¹ provided transportation		
b. Total number of passenger trips ² (most recent fiscal year)		
c. Total number of trips ² for which riders use a wheelchair (subset of b)		
d. Time period: ____/____/____ through ____/____/____		

¹A *person* is an unduplicated count of unique individuals receiving service (a person riding the vehicle 200 trips per year is counted as one person).

²A *trip* equals one person getting on a vehicle one time from an origin to a destination. Most riders make two or more trips per day, getting on once to go somewhere and then getting on again to return.

33. How many annual vehicle service hours were provided by your vehicle fleet when providing passenger transportation during the last calendar or fiscal year? (Estimates are acceptable.)

Total annual vehicle service hours: _____

34. How many annual vehicle service miles did your vehicle fleet travel when providing passenger transportation services during the last calendar or fiscal year? (Estimates are acceptable.)

Total annual vehicle service miles: _____

H. Operating Costs and Revenues

35. What were your transportation operating and capital expenses in the last calendar or fiscal year?

Category	[Calendar/Fiscal Year]
a. Transportation operation expenses	
• Administration	%
• Operations	%
• Maintenance (facilities and equipment)	%
Operating expenses subtotal	\$
b. Transportation capital expenses ¹	\$
Total operating and capital expenses	\$

¹Capital expenses include one-time purchases of vehicles, facilities, software, communications equipment, bus shelters, passenger amenities, etc.

36. If transportation is one of many programs you offer, what percentage of your total budget is spent on the transportation services described in this survey response?

Transportation is _____% of our total agency annual budget.

37. Please identify the percentage of your transportation budget that comes from each applicable source in the following table. (Estimates are acceptable.)

Transportation Operating Revenue Source	Percentage of Total FY 2019 Transportation Operating Budget
a. Fares collected from passengers as cash or purchased tickets/tokens (include client fees and/or general public fares)	
b. Revenues collected as cash or purchased ticket/tokens by third parties on behalf of passengers	
c. Reimbursements for services obtained from third parties (e.g., Medicaid reimbursements)	
d. City government appropriations	
e. County government appropriations	
f. State government appropriations	
g. Grants directly received by the organization	
• FTA Section 5307	
• FTA Section 5310	
• Title III (Older Americans Act)	
• Medicaid	
• Other (please specify):	
• Other (please specify):	
h. United Way	
i. Passenger donations	
j. Fundraising	
k. Contributions from charitable foundations, etc.	
l. Other (please specify):	

38. If your agency purchases or sponsors client transportation services from third parties, please identify them in the following table. (If the third party is a private individual, do not list their name; instead, sum all such entries in the *private individuals* category.)

Name of Third Party	Total Number of Trips Purchased	Rate and Basis of Payment (e.g., Per Mile, Per Trip) ¹	Total Amount Paid Last Fiscal Year
Public transit agency (please specify): _____			
Municipality (please specify): _____			
Human service agency (please specify): _____			
Private carrier (please specify): _____			
Private individuals			

¹If rates differ by trip type (e.g., ambulatory vs. nonambulatory), specify each rate and ridership separately. Also, specify rate structures that incorporate more than one structure (e.g., base plus per mile rate).

I. Assessment of Needs Met and Unmet

39. What are the top five trip demand generators for your customers or clients; that is, to which five destinations do your customers or clients travel most often?

Destination	Address	City	ZIP Code	Weekday Ridership					Saturday Ridership	Sunday Ridership
				AM Peak	Midday	PM Peak	Evening	Overnight		

40. Are you able to accommodate all the requests from your riders?

☐ Yes ☐ No

If no, what are the biggest obstacles? (Check all that apply.)

- ☐ a. Not enough funding to meet the demand
- ☐ b. High cost of operating/contracting for transportation services
- ☐ c. Driver recruitment/retention challenges
- ☐ d. Not enough vehicles
- ☐ e. Limited service area and service hours
- ☐ f. Funding source parameters (e.g., limited trip purpose eligibility)
- ☐ g. Other (please specify): _____

41. What other significant barriers in the region or community limit your riders' (or clients') mobility? (Check all that apply.)

- ☐ a. Lack of public transportation service in our area
- ☐ b. The affordability of those transportation services
- ☐ c. Limited hours and days of existing services
- ☐ d. Client eligibility restrictions imposed by various funding sources
- ☐ f. Trip destination limits (e.g., beyond municipality; imposed by funding sources)
- ☐ g. Trip purpose eligibility restrictions imposed by funding sources
- ☐ h. Inconvenient or lengthy path of travel
- ☐ i. Other (please specify): _____

42. Other than your service, what other transportation services in the existing transportation network provide the most useful mobility options for your riders/clients?

Public Transportation Services

- ☐ a. Fixed-route bus services provided by: _____
- ☐ b. Rail services provided by: _____
- ☐ c. Dial-a-ride services provided by: _____
- ☐ d. Taxi voucher/user-side subsidy program provided by: _____
- ☐ e. Volunteer driver program provided by: _____
- ☐ f. ADA paratransit service provided by: _____
- ☐ g. Flex transit services provided by: _____
- ☐ h. Microtransit services provided by: _____
- ☐ i. Alternative services provided by: _____
- ☐ j. Taxis and other nonmetered livery services provided by: _____
- ☐ k. Other (please specify): _____

Public Human Service Agencies

- ☐ l. Medicaid nonemergency medical transportation programs
- ☐ m. Veterans/disabled veterans nonemergency medical transportation services
- ☐ n. Other (please specify): _____

Senior Centers, Day Programs, Hospitals

- ☐ o. Senior centers
- ☐ p. Day programs
- ☐ q. Hospital transportation programs
- ☐ r. Other (please specify): _____

Private Carriers

- ☐ s. Taxis
- ☐ t. Transportation network companies (e.g., Uber, Lyft)
- ☐ u. Nonemergency medical transportation carriers (for hire)
- ☐ v. Other (please specify): _____

43. What top three enhancements are most needed to improve mobility in your service area? (Select three.)

- ☐ a. Greater coordination among providers
- ☐ b. More funding for operations
- ☐ c. More funding for equipment (excluding vehicles), communications, or outreach
- ☐ d. Mobility management
 - ☐ Regionwide transportation brokerage for multiple programs
 - ☐ Regionwide one-call/one-click services for trip discovery, planning, and booking
 - ☐ Travel training resources
 - ☐ County mobility managers
- ☐ e. Longer hours and/or more days of service
- ☐ f. More drivers and/or vehicles
- ☐ g. Loosening of eligibility restrictions
 - ☐ Client/customer eligibility
 - ☐ Eligible trip destination/service area limits
 - ☐ Eligible trip purposes
- ☐ h. Lower fares on existing services
- ☐ i. Use of Uber, Lyft and/or other ridesourcing companies
- ☐ j. Technology for scheduling or dispatching
- ☐ k. Other (please specify): _____

44. What type of transportation coordination activities do you currently participate in?

- ☐ a. Provision of coordinated service for client/customer/constituent trips
- ☐ b. Local coordination committee
- ☐ c. Regional transportation authority's project advisory committee
- ☐ d. Information and referral
- ☐ e. Joint procurement
- ☐ f. Joint training
- ☐ g. Joint dispatch and/or scheduling
- ☐ h. Shared backup vehicles
- ☐ i. Shared maintenance
- ☐ j. Joint use of vehicles
- ☐ k. Joint grant applications funding
- ☐ l. Driver sharing (paid or volunteer)
- ☐ m. Other (please specify): _____

Please explain your coordination activities further, naming the other participating organizations.

45. What issues, if any, have your coordination efforts encountered? (Check all that apply.)

- ☐ a. Statutory barriers to pooling funds
- ☐ b. Restrictions placed on the use of vehicles
- ☐ c. Liability/insurance concerns
- ☐ d. Local control issues
- ☐ e. Billing/accounting issues
- ☐ f. Unique characteristics of client populations
- ☐ g. Other (please specify): _____

46. In your opinion, what are the greatest coordination and mobility obstacle(s) in your service area?

47. In your opinion, what enhancements are most needed to improve the public transit and human service transportation in your service area?

48. On a scale of one to five, with five indicating the strongest support, is there sustained support for coordinated transportation planning among elected officials, agency administrators, and other community leaders in your area? (Circle one.)

Weak support _____ Strong support

1 2 3 4 5

49. On a scale of one to five, with five indicating the strongest perception, do you and members of the governing board perceive there to be real and tangible benefits to be realized if local organizations worked together to better coordinate the delivery of services? (Circle one.)

Weak perception _____ Strong perception

1

2

3

4

5

If yes, what are the potential benefits in your opinion? _____

50. If there are any other issues, concerns, or information relevant to this issue, please feel free to elaborate in the space below.

51. If you would like to provide more detailed information and feedback, please provide your name and contact telephone number in the space below so that we can schedule an interview. If there are other people you would recommend for a focus group or further conversation, please provide their names and contact information in the space below also.

Thank you for your participation!

Appendix I. Transportation Service Modes and Models

Appendix I defines and discusses various service modes that the lead coordination agency may encounter based on responses to the transportation provider survey. This appendix serves as a reference tool. The service modes discussed in this appendix include the following:

- Fixed-route transit services.
 - Bus services.
 - Rail services.
- Demand-responsive transportation services.
 - Dial-a-ride.
 - Taxi vouchers and user-side subsidy programs.
 - Volunteer driver programs.
 - Americans with Disabilities Act (ADA) complementary paratransit.
 - Flex transit.
 - Microtransit.
 - Alternative services.
- Vanpool.
- Micromobility.
- Ferry transit.
- Intercity bus/rail.

I.1. Fixed-Route Transit Services

Bus Services

Many transit agencies provide fixed-route transit services. Fixed-route transit service operates vehicles along specific, permanent routes. Passengers board and alight at designated stops along the route according to a preset schedule (see Figure I-1), although in some rural areas, transit agencies allow riders to flag down buses along the route in between stops.

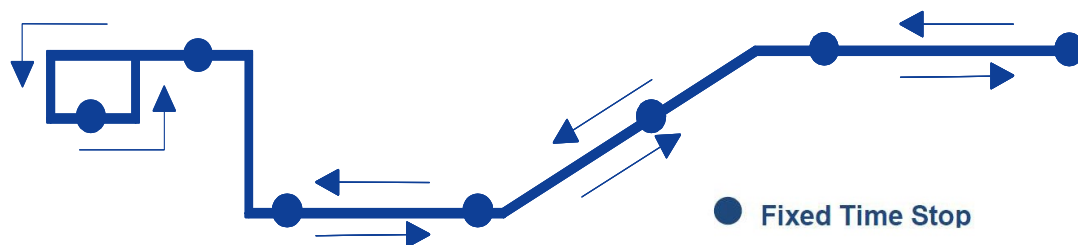


Figure I-1. Diagram of Fixed-Route Transit Service.

Fixed-route transit service can vary in type. Bus services use rubber-tired vehicles and include:¹

- **Local bus service.** Local bus service includes many bus stops, frequent stops, and lower operating speeds. Local bus services prioritize providing access to bus services over reducing bus travel times. Additional features of local bus service include the following:
 - At the facility or corridor level, local bus routes can be designed as trunk-and-branch routes, feeder routes, or circulator routes. At the system level, local bus networks can be radial, hub-and-spoke, grid, or hybrid in design. Facility and network designs influence the number of people that can access the bus service as well as bus frequencies, bus travel times, and required bus transfers.
 - Local bus services can take the form of an all-stop service, limited-stop service, or skip-stop service. In limited-stop and skip-stop services, buses do not stop at all bus stops along the route; access to bus service is traded for shorter bus travel times. Limited-stop and skip-stop services might be in effect only during certain time periods.
 - A rule of thumb in transit planning is that most riders will walk up to a ¼ mile to access local bus service.
- **Commuter (or express) bus service.** Commuter bus service connects outlying areas to a central city, serves a very limited number of stops, and tends to operate at higher speeds. Commuter bus services tend to be focused on work trips and might run only during peak periods on weekdays. Additional features of commuter bus service include the following:
 - The Federal Transit Administration (FTA) requires bus services to provide at least 5 miles of closed-door (no-stop) service to be considered commuter bus services.
 - Access to commuter bus services typically occurs at park-and-ride lots or via connecting bus routes.
 - Commuter bus services might make use of freeway managed lanes or high-occupancy vehicle lanes.
- **Bus rapid transit.** Bus rapid transit (BRT) service is designed and operated like rail service. It typically serves a limited number of stations (which are more substantial than bus stops) and operates at higher speeds. It tends to provide rail-like service levels on weekdays and weekends. Additional features of BRT service include the following:
 - To be eligible for federal New Starts Program funding, at least 50 percent of the BRT service must operate in a separate right-of-way that is dedicated to public transit during peak periods. The service must also use defined stations that provide shelter and information, use transit priority features, operate at least 14 hours/day on weekdays and 10 hours/day on weekends, and operate at short headways (i.e., no longer than 15 minutes all day or 10 minutes peak/20 minutes off-peak). The vehicles and stations must also have a distinct and consistent brand.
 - BRT services that do not fully meet the federal New Starts Program definition might be referred to as corridor-based BRT, BRT-lite, or arterial rapid transit.
 - A rule of thumb in transit planning is that most riders will walk up to a ½ mile to access rapid transit service (i.e., rail or BRT services).

Fixed-route bus service can be provided using vehicles that range in size from 30-foot-long minibuses to 60-foot-long articulated buses. Fixed-route buses can be powered by diesel, natural gas, biodiesel, electricity, hybrid electricity, and hydrogen. Fixed-route buses that receive power from overhead wires are called electric trolleybuses.

¹ Compiled from the Transit Cooperative Research Program's 2013 *Transit Capacity & Quality of Service Manual* (TCRP Report 165, 3rd Edition) and FTA's December 2024 *Capital Investment Grants Policy Guidance*.

Most fixed-route bus services operate in mixed traffic on streets and highways. Some make use of separate rights-of-way in the form of bus lanes or busways. Bus lanes can be for buses only or can be shared with a subset of other vehicle types; in both cases, bus movements interact with other transportation modes (e.g., with autos and pedestrians at intersections). Busways are roadways designed for the exclusive use of buses. They might be located adjacent to a highway or street, located in the median of a highway or street, or grade-separated (elevated or underground).

Rail Services

Rail services also vary in type. Common rail service types include:

- **Light rail transit.** Light rail transit service is characterized by its versatility of operation because it can operate separately from other traffic (below grade, at-grade, or on an elevated structure) or together with motor vehicles on the surface. Service can be provided using single cars or multiple-car trains. Electric traction power is typically obtained from an overhead wire. Three major types of light rail transit services exist:
 - **Light rail.** Light rail operates with relatively frequent service along mostly exclusive or segregated rights-of-way, using articulated cars and up to four-car trains.
 - **Streetcars.** Streetcars operate along mostly shared or segregated rights-of-way, with one-car (or rarely, two-car) trains. Vehicle types and ages can vary greatly.
 - **Vintage trolleys.** Vintage trolleys provide mainly tourist- or shopper-oriented services, often at relatively low frequencies, using either historic vehicles or newer vehicles designed to look like historic vehicles.
- **Heavy rail transit.** Heavy rail transit service is characterized by fully grade-separated rights-of-way; high-level platforms; sophisticated signaling; and high-speed, electric, multiple-unit cars. A third electrified rail usually supplies power, but some systems use overhead pantographs. The third-rail power supply, frequent service, and high operating speeds generally require grade-separated pedestrian and vehicular crossings.
- **Commuter rail.** Commuter rail is generally a long-distance transit mode using trackage that is part of the general railroad system, although portions may be used exclusively for passenger movement. Scheduling is often tailored to the peak travel demand rather than operating consistent headways throughout the peak period. Train operation may be by the transit agency, the track owner, or a third-party contractor.

I.2. Demand-Responsive Transportation Services

Demand-responsive transportation service is a broad term for nonfixed-route services that operate in response to individual trip requests. Table I-1 lists the types of demand-responsive transportation services.

Table I-1. Demand-Responsive Transportation Service Types.

Service Type	General Public	Limited Eligibility
Dial-a-ride	✓	✓
Travel voucher and user-side subsidy programs	✓	✓
Volunteer driver programs	✓	✓
ADA complementary paratransit		✓
Flex transit (route deviation or point deviation)	✓	
Microtransit	✓	✓
Alternative services		✓

Dial-a-Ride

Dial-a-ride services are implemented in many communities across the United States as a way to provide public transportation services to the general public, especially in communities with an insufficient demand density to support a fixed-route transit service. Dial-a-ride services are a staple of rural transit agencies, in part due to many rural public transit agencies having their origins in human service transportation. Dial-a-ride services are typically operated in-house or via a contractor. Many rural dial-a-ride systems continue to serve human service agency-sponsored trips. Dial-a-ride is popular in rural areas because it is generally a less costly and more effective alternative to providing fixed-route transit service, due to the lower demand density. In very rural regions, it is sometimes provided in certain areas on certain days (as a way to increase demand density). Dial-a-ride services are typically provided on an advance booking basis.

Taxi Vouchers/User-Side Subsidy Programs

Some transit agencies, municipalities, human service agencies, and hospitals have implemented taxi voucher programs as a way to harness existing private carriers to transport (in most cases) seniors, individuals with disabilities, or both at a much lower cost than operating a service themselves. The subsidizing entity sells travel vouchers (good for one trip) or scrip tickets (with values) to eligible customers at a discount. The customers then arrange for their own travel with private carriers (mostly taxis) that are willing, municipally required, or contracted to participate in the program. Drivers collect the vouchers or scrip tickets as fare, and the carriers submit the collected vouchers or scrip tickets to the transit agency for payment. While taxi vouchers are still used by many entities, some transit agencies have replaced the paper subsidies with bankcards or farecard systems because of challenges with fraud. With card systems, the transit agency matches (in some ratio) the funding the rider puts on the card, and the rider then arranges for transportation with carriers who accept the card.

Volunteer Driver Programs

The National Volunteer Transportation Center defines volunteer transportation as a program of service that includes volunteer drivers and/or volunteer escorts when providing transportation. These programs and services may also include volunteer vehicles, as well as paid drivers and vehicles that are owned or leased by the organization providing volunteer transportation. Volunteer transportation programs vary based on their size, types of trip destinations, levels of services offered, target populations, and funding. Volunteer transportation programs operate out of faith-based organizations, nonprofits, human service agencies, and transit agencies.

As a staple in many rural areas, volunteer driver programs are sometimes the only transportation option (demand density may be insufficient to support a dial-a-ride service). Trip requests can be matched with volunteer drivers in various ways. In some programs, managers/schedulers—with or without assistance of technology—assign trips to certain drivers. In some cases, drivers make themselves available for a period of time on certain days. In other cases, the matching is more variable depending on the driver's situation on a given date. In more advanced programs, drivers can pick trips off the equivalent of an electronic ride-board. In some cases, the volunteer drivers are found by the riders, with riders convincing family members or friends to become volunteer drivers but just for their trips. Typically, volunteer drivers drive their own cars and are reimbursed at the Internal Revenue Service rate for mileage reimbursement (currently \$0.67). Some volunteer driver programs are *coordinated*, meaning they are part of a human service agency's network of providers, such as with Medicaid nonemergency medical transportation. Here, the reimbursement rate for these agency sponsors also helps cover some of the administrative costs.

ADA Complementary Paratransit

Public transit agencies that provide local fixed-route transit services must also provide ADA complementary paratransit services for people whose disabilities prevent them from accessing and/or using the fixed-route system. ADA paratransit obligations do not apply to commuter bus, commuter rail, or intercity rail service. Eligibility includes a rider's inability to access vehicles, transit stops, or facilities, or to independently navigate through the system. ADA paratransit must be an origin-to-destination service, providing service from a passenger's origin to the passenger's destination.



ADA complementary paratransit is highly regulated, with six service criteria controlling minimum requirements for service area, days and times of service (ADA paratransit must be provided where and when local fixed-route bus service is provided), advance reservations, fares, the absence of restrictions or priorities, and the absence of capacity constraints. FTA guidelines add many more requirements.

Transit agencies have implemented their ADA paratransit services in a variety of ways and using different service models. ADA paratransit services are often provided with dedicated fleets operated by transit agencies or their contractors. If contractors are used, various functions can be split between the transit agency and the contractor(s). Often, nondedicated service providers such as taxi and adaptive transportation network companies (TNCs)² are used for *overflow* or *supplemental* ADA paratransit service. Similar to some dial-a-ride services, many transit agencies have chosen to use their ADA paratransit service platform to also serve human service agency-sponsored trips, which can improve the overall productivity of the service.

Flex Transit

A flexible transit service (*flex transit*) combines attributes of fixed-route transit and demand-responsive transportation services. Common types of flex transit include the following:

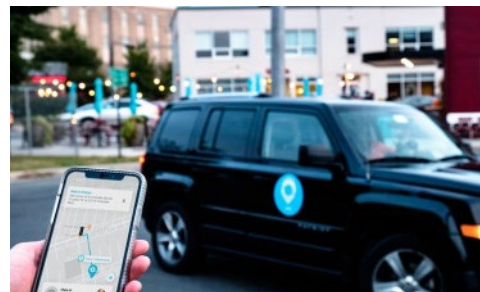
- **Route deviation services.** A bus operates along a fixed route unless a rider requests a deviation. In such cases, the bus will deviate off its route to pick up or drop off an off-route rider who has requested the deviation and then immediately return to the fixed route.
- **Checkpoint (or point) deviation services.** A bus is committed to serving certain stops on a fixed schedule but is otherwise free to serve other origins and destinations between these stops. In a checkpoint deviation service, no fixed route exists.

Transit agencies have generally used flex transit to expand public transit beyond a walkshed to areas and/or times that are not conducive to fixed-route service. Some transit agencies base their entire service on flex transit as a *tweener* alternative to fixed-route and dial-a-ride service. Many other transit agencies operate flex transit in certain areas or along certain route segments while operating fixed-route service in other areas or along other portions of the route. Importantly, flex transit has no obligation to also provide ADA paratransit for a route deviation service where deviations are possible or for a checkpoint deviation service because there is no fixed route.

² Adaptive TNCs include services such as SilverRide and GoGoGrandparent. These companies typically have driver requirements that comply with ADA paratransit, such as passing FTA and state drug and alcohol tests and training on how to assist persons with disabilities.

Microtransit

Microtransit is an on-demand service for the general public. The definition of microtransit is still evolving. Some transit agencies include that such services must be shared-ride or at least sharable in the definition. Other transit agencies include subsidized exclusive-ride on-demand services for the general public in the definition of microtransit. Regardless, service data can only be included in National Transit Database reporting if the service is shared-ride. Also note that many microtransit systems also allow advance reservations.



Many but not all microtransit services can be requested via an app, noting there needs to be a backup call-in option for potential riders who do not have access to a smart phone or the internet. From there, the supporting technology is continuously optimizing the ride assignments to vehicles based on configurable parameters that are set to reflect specified maximum response times vs. service efficiency goals.

In many cases, transit agencies are implementing microtransit as a more cost-effective way to expand public transit to a new area (providing a first-mile/last-mile connection) and/or at a new time unsuitable for fixed-route transit service. Where demand for fixed-route transit service in a particular area or time is unknown, a transit agency can implement microtransit as a way to test the demand. Depending on the ridership that materializes, the new microtransit service can remain intact, or could be a bridge to new fixed-route transit services or a new service model. The second most common reason to implement microtransit services is to replace an underperforming bus route or route segment. In both cases, the replacement microtransit service is the more cost-effective option.

Microtransit services are traditionally provided in relatively smaller zones (e.g., 3–7 square miles) where the objectives can be achieved. Service models for rural areas typically focus on areas where a productivity of at least 2.0 (preferably 3.0–5.0) trips per revenue vehicle hour can be realized.

Microtransit services can be operated in several different ways. A transit agency can operate the service with dedicated vehicles and perform all other support functions in-house, noting that the agency will need to procure on-demand technology. The transit agency could alternatively use a contractor to operate the service with dedicated vehicles. Under this model, either the transit agency and/or the contractor could perform support functions; for example, either the agency or the contractor could perform the call center functions or the backup concierge booking service. Either could be responsible for providing the on-demand technology, and either could provide the vehicles. A recent trend has seen transit agencies consolidating their microtransit and ADA paratransit services, using the same set of drivers, vehicles, and technology to serve the general public and ADA paratransit customers. A transit agency could also use TNCs and/or taxis to operate the service, either under contract or as part of a user-side subsidy program. Several microtransit services also use TNCs and/or taxis as overflow providers for the primary operator, as well as other transit agencies where TNCs are directly available to the rider.

Alternative Services

An alternative service is a transit agency-subsidized on-demand service for ADA paratransit customers. More and more, transit agencies have been providing such services as a way to provide on-demand (or same-day) service to ADA paratransit customers. In some cases, the alternative services provided have an expanded service area or service hours (as compared to ADA paratransit). Generally, alternative services utilize taxis, TNCs, or both, using a provider-side subsidy or a user-side

subsidy model. While alternative services do not have to meet ADA paratransit requirements, they must comply with service equivalence requirements under the ADA (such as equivalent response times).

Transit agencies are also providing alternative services as a way to reduce the overall cost of transporting their ADA paratransit customers (or to provide more trips for the same budget). In a user-side model, a rider will pay a nominal base fare, and the transit agency will subsidize the remaining fare balance but only to a certain maximum fare level. If the fare level is higher (for longer trips, for example), the rider is responsible for the overage. Most alternative service programs also come with monthly or daily trip limits. For some programs, the trip limits for a specific rider are correlated with that rider's historic use of the ADA paratransit service.

The transit agency saves money by setting the maximum subsidy per trip well below its average operating cost for its ADA paratransit service. The transit agency therefore saves money for each trip taken on the alternative service that would have been taken on the ADA paratransit service. If the savings from these *mode-shift* trips total more than the subsidies paid out for the newly induced trips on the alternative service, then the transit agency receives a net savings.

Alternative services are detailed in *The Provision of Alternative Services by Transit Agencies: The Intersection of Regulation and Program*.³

I.3. Vanpool

Carpool and vanpool services provide transportation to a group of individuals traveling directly between their home area and a regular destination within the same geographical area. To be considered public transportation, vanpool programs must:

- Use vehicles with a minimum seating capacity of seven people, including the driver.
- Use vehicles for which 80 percent of the yearly mileage comes from commuting.
- Be open to the public (any vans that are restricted by rule to particular employers are not public transportation).
- Be actively engaged in advertising the vanpool service to the public and in matching interested members of the public to vans with available seats.
- Be publicly sponsored.



³ Ellis, E., Lasky, S., Mehrotra, R., Rodman, W., & Hansen, T. (2023). *The Provision of Alternative Services by Transit Agencies: The Intersection of Regulation and Program* (Transit Cooperative Research Program Research Report 239). National Academies of Sciences, Engineering, and Medicine. The National Academies Press.

I.4. Micromobility

Typically available in urban areas, micromobility services encompass a broad variety of personal transportation options comprised of lightweight, electric, low-speed vehicles (typically 30 miles per hour or less). Micromobility includes shared bikes, motorized kick scooters, and other personal transportation devices. Micromobility options are detailed in *Transit and Micromobility*.⁴ Two predominate types of micromobility include bikeshare and scooter sharing services, which can be described as follows:



- **Bikeshare services.** Bikeshare services offer short-term rental of fleet bicycles, usually for durations of one hour or less. Regardless of whether it is docked or dockless, a bikeshare service may use bikes that are fully human powered or that provide electric motor assistance.
- **Scooter sharing services.** Scooter sharing services use the same basic technologies as dockless bikeshare services to enable the service but rely entirely on motorized scooters (operated either standing or seated). A version of scooter sharing that uses larger electric vehicles—more akin to mopeds or Vespa-type scooters—is a growing subset of this market.

I.5. Ferry Transit

Ferry transit services provide water connections between or among points where land routes are interrupted by water and effectively form part of the longer land route. Ferry services play a role in the transit systems of some coastal regions in Texas, providing pedestrian, bicycle, and vehicle (in some cases) transport across waterways where transportation connections are desirable but conditions either do not justify a bridge or tunnel or alternative bridges and tunnels are congested.

I.6. Intercity Bus/Rail

Intercity bus and rail services carry passengers significant distances between different cities, towns, or other populated areas. Intercity bus and rail services can be publicly or privately operated (e.g., Greyhound, Amtrak). The service operates with limited stops, facilitating travel between populated centers.

For communities with access to intercity bus and/or rail (Amtrak) service, these modes can play a major role in transportation to and from the local area. Intercity bus providers and Amtrak should be invited to participate in the planning process through meeting participation and stakeholder interviews or surveys. Private rail provider information may not be available for all data elements—please note where unavailable.

⁴ Murphy, C., Curtis, T., Costagliola, E., Clewlow, R., Seki, S., & Xu, R. (2021). *Transit and Micromobility* (Transit Cooperative Research Program Research Report 230). National Academies of Sciences, Engineering, and Medicine. The National Academies Press.

Appendix J. Example Vehicle Utilization Chart

The transportation provider survey can be used to collect detailed vehicle inventory information. As much detailed information as possible should be collected within the available resources. In some cases, a transportation provider's ride management system, scheduling and dispatch system, or asset management system will be capable of generating detailed reports containing the necessary information. In other cases, you may need to work directly with agency or provider staff to collect the necessary information, which may limit the analysis.

J.1. Basic Vehicle Inventory

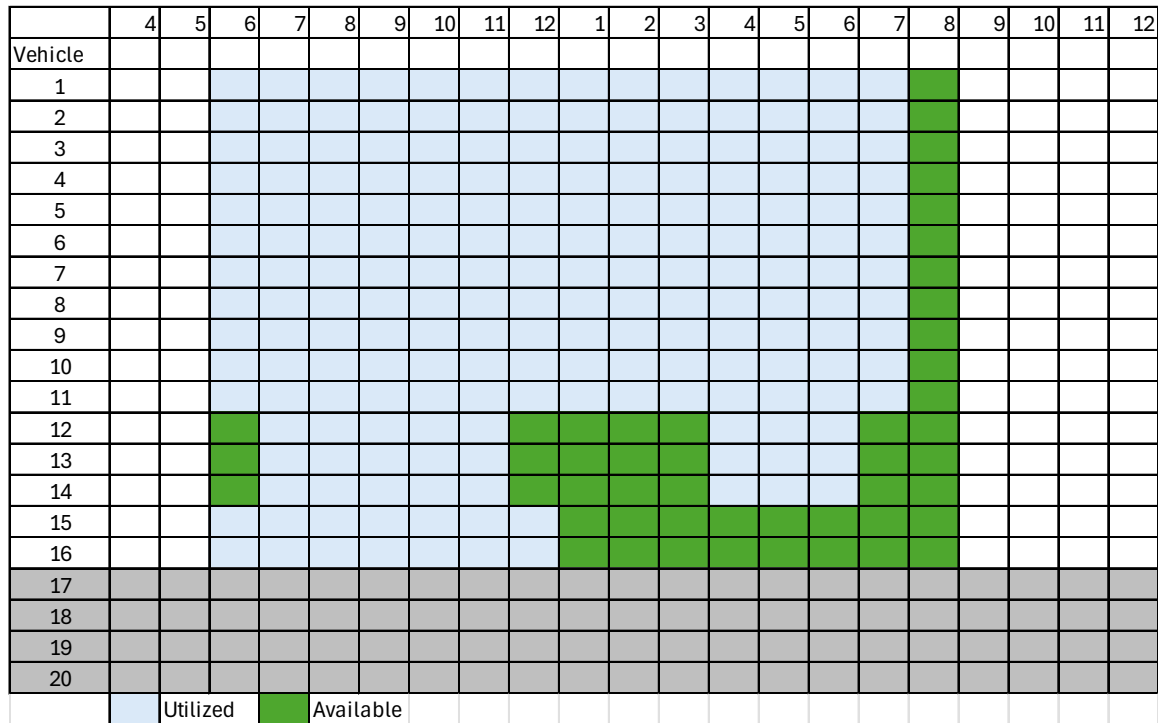
Basic vehicle inventory information should be collected for all vehicles that perform public and human service transportation. The following series of bullets can be used in the transportation provider survey to collect information for a detailed vehicle inventory:

- Vehicle identification number.
- Make.
- Model.
- Year.
- Mileage.
- Total seating capacity without wheelchairs.
- Total seating capacity with wheelchairs.
- Number of wheelchair securement positions.
- Lift or ramp availability.
- Lift or ramp dimensions.
- Door height.
- Maximum combined weight rating for lift or ramp.

J.2. Vehicle Utilization Chart

Section D in Appendix H. Example Transportation Provider Survey of this document provides a useful vehicle utilization chart template. Figure J-1 shows example vehicle utilization charts for weekdays and weekends. In this example, a transit agency has 16 vehicles that are utilized during weekdays and 12 that are utilized during weekends. These charts provide a visual tool to determine times during which transit vehicles are idle and thus available for coordinated transportation.

Weekdays



Weekends (Saturday or Sunday)

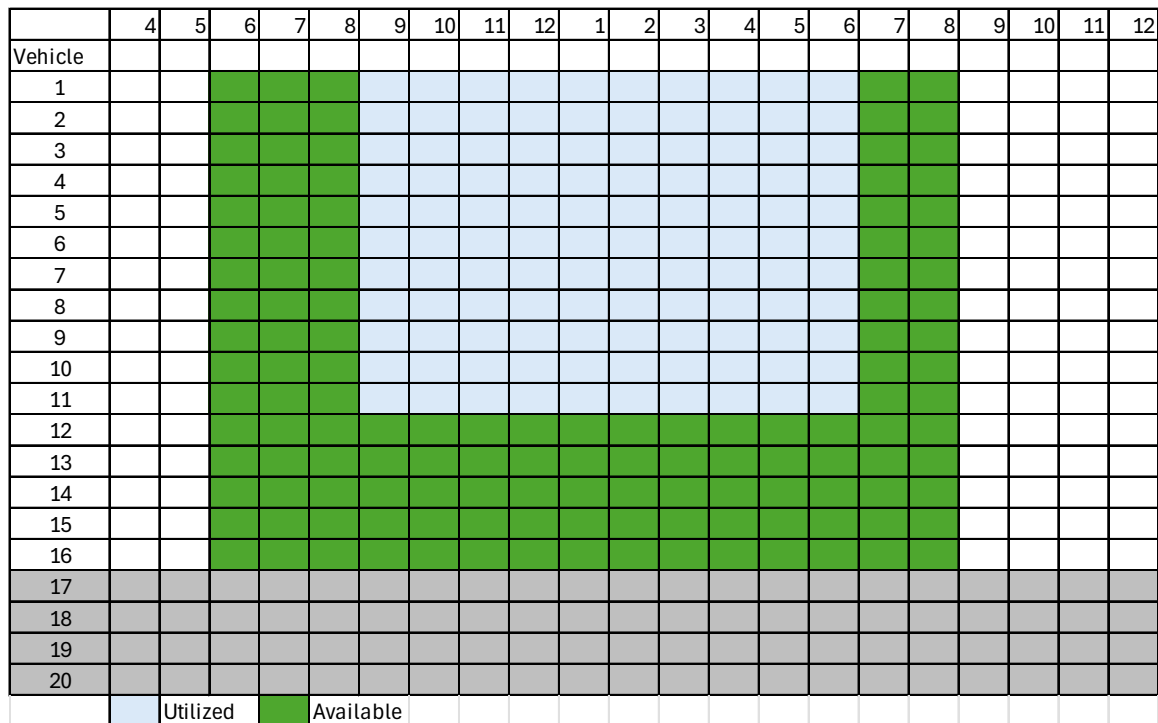


Figure J-1. Example Vehicle Utilization Charts for Weekdays and Weekends.

Appendix K. Example Goals and Strategies Matrix

Goal	Scope	Needs Addressed	Priority Level (1 to 4)	Relative Cost	Strategies
Improve the sustainability of the transportation network available for seniors, individuals with disabilities, and individuals with low incomes	Region (specify)	<ul style="list-style-type: none"> Improved resources/ processes to find providers Increased local and state funding for transportation 	4	\$	1. Restart a regional coordination committee to facilitate implementation of the goals
	Region (specify)	<ul style="list-style-type: none"> Improved resources/ processes to find providers Increased provider capacity 	3	\$\$	2. Revisit the mobility management structure and consider naming a <i>champion</i> to lead efforts to accomplish the goals
	Individual county or multicounty/ region (specify)	<ul style="list-style-type: none"> Increased evening/ weekend service Decreased cross-jurisdictional boundaries Improved access to safe/ appropriate transportation Improved access to shopping/ medical appointments More flexible service structure 	2.6	\$\$	3. Establish a volunteer driver program to fill service gaps for seniors and individuals with disabilities or low incomes
	Individual county or multicounty/ region (specify)	<ul style="list-style-type: none"> Increased access to wheelchair- accessible vehicles 	2.9	\$\$	4. Prioritize funding for new/ replacement wheelchair accessible vehicles
	Individual county or multicounty/ region (specify)	<ul style="list-style-type: none"> Increased evening/ weekend service Decreased cross-jurisdictional boundaries Improved access to affordable transportation options 	2.7	\$	5. Develop shared-ride/ vanpool options for individuals with disabilities to/from employers, Boards of Developmental Disabilities, and Centers for Independent Living
Expand transportation provider capacity to meet the needs of seniors and individuals with disabilities	Individual county (specify)	<ul style="list-style-type: none"> Increased evening/ weekend service Decreased cross-jurisdictional boundaries 	2.7	\$	1. Explore ways to expand workforce transportation programs or paid drivers to transport groups to/ from work
	Individual county (specify)	<ul style="list-style-type: none"> Improved safety at bus stops Improved sidewalks/ walking paths 	2.9	\$	2. Expand neighborhood partnerships that fund/ maintain bus shelters/ benches in high-need communities or areas with high populations of seniors and individuals with disabilities
	Individual county (specify)	<ul style="list-style-type: none"> Increased evening/ weekend service Increased same- day rides More flexible service structure 	3.4	\$\$\$	3. Explore public-private partnerships for on-demand services during evenings/weekends
	Individual county (specify)	<ul style="list-style-type: none"> Increased availability of trained professionals to assist riders Improved resources/ processes to find providers 	3.0	\$	4. Train assistants/ ambassadors who ride with seniors or others needing special assistance/care
Create partnerships between providers that will eliminate the barriers to regional mobility for seniors and individuals with disabilities	Multicounty/ region (specify)	<ul style="list-style-type: none"> Improved resources/ processes to find providers Increased provider capacity Improved access to multilingual information 	3.4	\$\$\$\$	1. Establish a central call center for scheduling trips with any partner provider for regional destinations
	Region (specify)	<ul style="list-style-type: none"> Improved access to shopping/ medical appointments Improved access to safe/ appropriate transportation Improved resources/ processes to find providers 	3.4	\$	2. Create/distribute an inventory of affordable/ senior housing locations accessible to public transit and/or agency transportation programs
	Individual county (specify)	<ul style="list-style-type: none"> Decreased cross-jurisdictional boundaries Increased same- day rides Increased provider capacity 	3.2	\$\$ to \$\$\$	3. Establish private/ volunteer demand-responsive services to provide first-/last-mile trips that cross the jurisdictional boundaries of public transit operators

Goal	Scope	Needs Addressed	Priority Level (1 to 4)	Relative Cost	Strategies
	Multicounty/region (specify)	<ul style="list-style-type: none"> Improved access to shopping/ medical appointments Decreased cross-jurisdictional boundaries 	3.2	\$\$\$	4. Establish a medical transportation model servicing anywhere in the region on limited days of the week; coordinate with multiple providers so that several days are covered
Eliminate price as a barrier to reliable transportation options for seniors and individuals with disabilities	Multicounty/region (specify)	<ul style="list-style-type: none"> Improved access to affordable transportation options Improved access to shopping/ medical appointments Increased local and state funding for transportation 	3.3	\$\$	1. Develop partnerships to secure additional local funding for health and wellness-related trips
	Multicounty/region (specify)	<ul style="list-style-type: none"> Improved access to affordable transportation options Improved access to shopping/ medical appointments Increased local and state funding for transportation 	3.3	\$\$	2. Establish/manage/secure funding to create a dedicated resource/fund for subsidized fare cards for eligible individuals on participating public/private transportation services
Enhance information and outreach efforts to seniors and individuals with disabilities	Multicounty/region (specify)	<ul style="list-style-type: none"> Improved resources/ processes to find providers Improved access to multilingual information 	3.2	\$	1. Continue to update available service information
	Multicounty/region (specify)	<ul style="list-style-type: none"> Increased availability of trained professionals to assist riders Improved information sharing Decreased cultural barriers 	3.5	\$\$	2. Train transportation ambassadors at local senior centers, hospitals, nursing homes, and human service agencies on access to transportation services in their area
	Multicounty/region (specify)	<ul style="list-style-type: none"> Decreased cultural barriers 	3.1	\$	3. Communicate/share information through culturally relevant channels
	Multicounty/region (specify)	<ul style="list-style-type: none"> Decreased cultural barriers Increased availability of trained professionals to assist riders 	2.8	\$	4. Create a training video about transportation services for seniors and individuals with disabilities; share it with agencies that serve these populations

Appendix L. Regional Public Transportation Coordination Plan Coordination Timeline 2025–2027

Start	End	Task	2025												2026												2027
			Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	
2/17/2025	2/21/2025	Each local coordination agency decides whether it will need a consultant																									
2/24/2025	3/21/2025	Applications are opened in the IGX grant system																									
2/24/2025	4/16/2025	The request for proposal (RFP) is completed																									
4/11/2025	4/11/2025	Texas Department of Transportation (TxDOT) Public Transportation Division (PTN) agency negotiations are completed, and grant amounts are set ^a																									
4/16/2025	4/16/2025	The RFP is issued																									
4/25/2025	4/25/2025	RFP questions are due																									
5/2/2025	5/2/2025	RFP questions are answered																									

Start	End	Task	2025												2026												2027
			Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	
5/16/2025	5/16/2025	Proposals are due (an adequate 6-week period is allowed for proposal submissions)																									
5/19/2025	5/30/2025	Proposals are evaluated, and an award is made ^a																									
5/21/2025	5/21/2025	A commission meeting is held, and a minute order is awarded ^a																									
5/26/2025	5/26/2025	Project grant agreements (PGAs) are distributed ^a																									
6/1/2025	6/1/2025	The PGA begins (start date can be delayed depending on PGA execution) ^a																									
6/1/2025	6/1/2025	The consultant contract (or Notice to Proceed) is executed (depending on PGA execution)																									
6/2/2025	6/2/2025	Consultant services begin for a 16-month project																									
2/2/2026	4/30/2026	The interim plan is reviewed																									
8/31/2026	8/31/2026	The draft final report is ready for public comment (15 months from start)																									

Start	End	Task	2025												2026												2027
			Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	
9/1/2026	9/15/2026	Public comments are received																									
9/16/2026	9/30/2026	Public comments are woven into the plan, the final plan is completed, and consulting services end																									
10/1/2026	11/30/2026	The plan is submitted to TxDOT																									
10/1/2026	1/29/2027	The final plan is reviewed (rolling)																									

^aIndicates a TxDOT PTN task.

Appendix M. Coordination Planning Project Timeline

Task	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Stakeholder engagement (Chapter 2)	Regional Coordination Committee (RCC) kickoff meeting and outreach plan completion	Provider survey development and launch	Survey completion, follow-up interviews, and focus group planning	Focus groups and RCC quarterly meeting			RCC quarterly meeting			RCC quarterly meeting			Stakeholder/public feedback and RCC workshop		Stakeholder/public feedback	RCC quarterly meeting	
Geographic assessment (Chapter 3)		Geographic assessment															
Demographic assessment (Chapter 4)			Demographic assessment														
Transportation services assessment (Chapter 5)		Provider survey development and launch	Survey completion and follow-up interviews	Transportation provider profiles initiation	Transportation provider profile completion	Service duplication and gaps assessment by county, service days/times, eligible customers, and trip purpose											
Transportation needs and gaps assessment (Chapter 6)								Unmet needs identification and prioritization									
Interim plan								Interim plan completion on or before February 27									

Task	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Review of interim plan (Texas Department of Transportation [TxDOT] Public Transportation Division [PTN], Texas A&M Transportation Institute and HNTB)									TxDOT PTN review of interim plan								
Identification of goals and strategies (Chapter 7)											Goals and strategies development						
Prioritization of goals and strategies (Chapter 8)													Prioritization workshop				
Draft final plan and final plan														Draft final plan		Final plan	
Plan approval (Chapter 9)																RCC approval	
Submittal of approved plan to TxDOT																	Approved plan submittal to TxDOT

Appendix N. Coordinated Human Services Public Transportation Plan Development—Request for Proposal Template

Note to Request for Proposal (RFP) preparer: This template is intended to guide the drafting of an RFP to solicit consultant bids to prepare a Coordinated Human Service Public Transportation Plan following the *Texas Department of Transportation (TxDOT) Coordinated Plan Guidebook*. The content should be adapted to suit the specific needs and jurisdiction. Guidance notes—labeled as *Note to RFP preparer*—are included throughout to assist in tailoring the RFP to specific needs; these notes should be removed prior to distribution to potential bidders.

IMPORTANT DISCLAIMER: This document does not constitute legal advice. The final version of the RFP should be reviewed by qualified legal counsel and your PTC to ensure compliance with local, state, and federal procurement requirements specific to the jurisdiction.

RFP SECTION 1: INTRODUCTION

The [Agency Name] (the Agency) is soliciting proposals from qualified consultants to update the Regional Public Transit Coordination Plan (the Plan) for the [Region/Area Name]. This plan will comply with requirements outlined in the *TxDOT Coordination Plan Guidebook* and align with state and federal regulations, including Federal Transit Administration Section 5310.

Note to RFP preparer: Agencies can modify this introduction to reflect their specific goals or additional requirements. For example, if your agency intends to perform some of the tasks outlined in the Coordination Guidebook, you should clarify the division of responsibilities, i.e., specify the tasks for which the agency vs. the consultant will be responsible.

RFP SECTION 2: PURPOSE AND OBJECTIVES

The purpose of this RFP is to identify and contract with a consultant with the expertise to:

- Conduct a comprehensive assessment of the transportation needs of target populations (e.g., seniors and individuals with disabilities, but also low-income residents, zero car households, youths, residents with limited English proficiency, veterans, and clients of workforce agencies (job seekers).
- Help organize and facilitate meaningful stakeholder and public engagement.
- Identify gaps and duplication in transportation services focused on the above populations
- Identify and help facilitate a prioritization of unmet needs
- Identify goals and strategies that stem from the prioritized unmet needs and help facilitate the prioritization of those strategies
- Prepare a 5-year update to our regional coordination plan that meets TxDOT's requirements and supports funding eligibility.

RFP SECTION 3: SCOPE OF WORK

The selected consultant will perform the following tasks, per the *TxDOT Coordination Plan Guidebook*; the schedules that are contained in the Guidebook (see especially Timeline 2 in

Appendix M); and using the tools and methodologies as described in the Guidebook and its appendices

Task 1: Project Management

- Conduct a kickoff meeting with the Agency and the Regional Coordination Committee (RCC) members To go over the tasks, the preliminary schedule of tasks and deliverables and clarify the divisions of responsibilities and the role of the RCC [Note: the Agency might also seek the consultant's help in inviting additional individuals to join the RCC in order to broaden representation of the organizations serving the target populations].
- Revise the project timeline as needed per discussions at the kick-off meeting.
- Schedule and conduct monthly check-in calls with the Agency's project manager
- Prepare and submit monthly progress reports to the Agency

Task 2: Stakeholder and Public Engagement

- Prepare and submit a stakeholder/community engagement plan and communication plan
- Schedule and conduct stakeholder surveys/interviews, rider surveys and/or focus groups, and public meetings, as per the Coordination Guidebook
- Engage representatives from target populations and relevant agencies via the RCC and provider survey effort in Task 3.

Task 3: Existing Conditions Analysis

- Prepare a geographic assessment
- Prepare a demographic assessment including the Transit Needs Index (TNI) map
- Prepare an assessment of transportation services in the region that provide trips to the target populations; this effort will include conducting a survey of such transportation providers and preparing profiles of each of the transportation providers.
- Identify instances of service duplication and service gaps instances of unmet transportation needs
- Prepare and submit a Task 3 Technical Memorandum on the findings from this task
- Conduct a workshop (Workshop #1) for the RCC where the existing conditions, the instances of duplication and service gaps and instances of unmet needs are presented and discussed, and at which the consultant will help the RCC prioritize the unmet needs

Task 4: Prepare the Interim Plan

- Compile the findings from the preceding tasks into Chapters 1 through 6 of the Interim Plan, per the required format in the Coordination Guidebook
- Submit the Interim Plan to the RCC for review, and revise the Interim Plan
- Revise Chapters 1 through 6 as needed per feedback from the RCC: [Note, the Agency must submit the Interim Plan to TxDOT by March 2026.]
- Conduct any "missing activities" and revise the Interim Plan, as needed per instructions from TxDOT stemming from its review of the Interim Plan.

Task 5: Goals and Strategies

- Develop matrices of goals and strategies that trace back to the unmet needs prioritized in the Interim Plan
- Prepare and submit a Task 5 Technical Memorandum that introduces and discusses these matrices
- Conduct a workshop (Workshop #2) for the RCC where the goals and strategies are presented and discussed, and at which the consultant will help the RCC prioritize the goals and strategies
- Revise the matrices per discussions at the workshop

Task 6: Draft Final Plan and Final Plan

- Prepare and submit Draft Final Plan
- Review the Final Plan per Agency/RCC feedback
- Help the Agency promulgate the stakeholder/community review of the Draft Final Plan
- Present to the Agency/RCC suggested changes based on the stakeholder/community feedback, and come to a consensus on final changes
- Prepare and submit Final Plan, including all supporting data and documentation and required signatures

RFP SECTION 4: PROPOSAL SUBMISSION REQUIREMENTS

Proposals should include the following sections, without exceeding **[Page Limit]**:

1. **Transmittal letter.** Include the name, title, and contact information of the primary contact.
1. **Project understanding.** Describe the Plan's objectives and requirements.
2. **Technical approach.** Describe the methodologies, tools, and strategies for completing the tasks.
3. **Team composition and experience.** Provide resumes of key personnel and highlight relevant experience.
4. **Schedule.** Include a timeline with key milestones and deliverable dates.
5. **Cost proposal.** Submit a separate sealed cost proposal with a detailed budget per task and project staff member. The payment schedule may be based on milestones or time and materials with a not to exceed amount. [Agency should specify.]

Note to RFP preparer: Agencies should ensure the requirements align with their procurement policies and resource constraints.

RFP SECTION 5: EVALUATION CRITERIA

The Agency will evaluate proposals based on the following criteria:

- **Project understanding and technical approach.**
- **Qualifications and experience of the consultant team.**
- **Stakeholder engagement plan.**
- **Proposed schedule.**
- **Cost effectiveness.**

The Agency reserves the right to award the contract to the consultant whose proposal is deemed most advantageous.

Note to RFP preparer: Agencies should tailor evaluation criteria to reflect their specific priorities and procurement guidelines.

RFP SECTION 6: RESOURCES AND REFERENCES

Consultants must review the following documents:

- *TxDOT Coordination Plan Guidebook.*
- *Coordination Plan Guidebook Appendices* (includes survey templates, data tools, and sample bylaws).
- Relevant local or regional planning documents **[Insert Links or References]**.

Note to RFP preparer: Agencies should provide direct links or attachments to resources to facilitate consultant access.

RFP SECTION 7: ADDITIONAL INFORMATION

The Agency may include the following information as part of the RFP:

- **A disclaimer stating,** “The Agency reserves the right to reject any or all proposals and to request additional information or clarification.”
- **Submission instructions as follows:**
 - Submit **[Number]** hard copies and **[Number]** electronic copies (via **[Submission Method]**).
 - Proposals must be received by *[Submission Deadline]* at **[Submission Address]**.
- **Contact information for questions as follows:**
 - Name: **[Contact Name]**
 - Email: **[Contact Email]**
 - Phone: **[Contact Phone]**

Note to RFP preparer: Agencies should ensure submission instructions comply with their policies and capabilities.

RFP SECTION 8: ATTACHMENTS

The Agency may include the following attachments as part of the RFP:

- Sample contract.
- Proposal checklist.
- Required forms (e.g., Title VI Certification, Debarment Certification).

Note to RFP preparer: Agencies should update attachments to reflect specific requirements.