Breakfast

Please Prepare for Launch
(Please take your seats!)

This is the voyage of the starship Optimize, its five-year mission to coordinate transportation services and resources; to seek out new ways to enhance access and mobility, and boldly go where no state has gone before!

Boldly Go: The Five-Year Planning Mission

Live long and coordinate

Welcome, Introductions and Agenda

Agenda

Your Mission

- 7:30 – 8:30 am   **Breakfast**
- 8:30 – 10:00 am   Welcome and Introductions
- 10:00 – 10:10 am   **Break / Refreshments**
- 10:10 – 10:40 am   Why are we here? Guidebook Introduction
- 10:40 – 11:00 am   Outreach/Engagement
- 11:00 – 12:00 noon   Existing Conditions Assessment
- 12:00 – 1:00 pm   **Lunch / Guest Speaker**
- 1:00 – 1:45 pm   Goals, Strategies, Prioritization
- 1:45 – 1:55 pm   Plan Documentation & Adoption
- 1:55 – 2:10 pm   Breakout Session Intro/Grouping
- 2:10 – 3:10 pm   Breakout Group Discussions
- 3:10 – 3:20 pm   **Break / Refreshments**
- 3:20 – 4:00 pm   Breakout Groups Report Out
- 4:00 – 4:15 pm   Coordination Plan Timelines
- 4:15 – 4:30 pm   Wrap Up and Review

Break/Refreshments
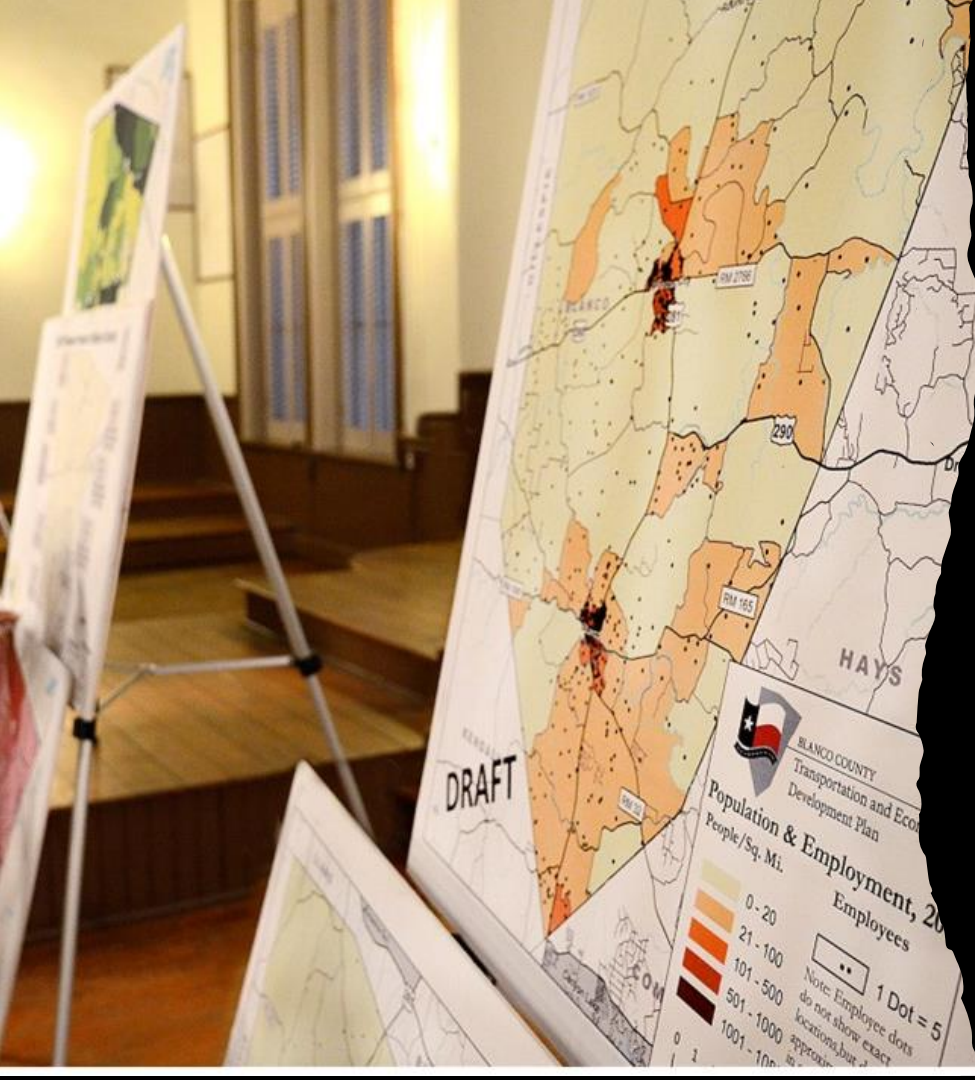
Why are We Here?

Introduction to the Guidebook— Chapter 1

Why Are We Here

5-Year Regional Public Transportation Coordination Plan *Requirement!*

→ Represents 24 Coordination Regions in Texas

Understand the Timeline - Coordination Planning Happens at the Same Time During Year

→ New - Regional Plans are to Conform to the New Coordination Guidebook

Coordination Planning & Guidebook Introduction

Why need a new Coordination Guidebook?

• Many plans submitted have **shortcomings**

• Several regions have thought of the finished plan as an end product—**just the beginning!**

• Need for you to **understand required steps**

• You can not apply for **5310 funding** for a coordination project unless it appears in the 5-year coordination plan

• The project or strategy must **trace back to a prioritized unmet need**

Why Coordinate?

- Coordination can result in **efficiencies**

- **Savings** from such efficiencies can be harnessed to provide more service or improve services

- **Reduce / meet the unmet needs in the community to include target p**opulations, such as
    - Seniors
    - Persons with disabilities
    - Low-income residents
    - Zero car households
    - Youths
    - Residents with limited English proficiency
    - Veterans
    - Clients of workforce agencies (job seekers)

Guidebook Intent

- To provide information and tools to the Lead Coordination Agencies & Regional Coordinating Committees

- To provide guidance in:
  - Determining projects, strategies, and approaches

  - Prioritizing projects, strategies and approaches

  - Developing a Plan that is organized based on the new outline

  - Utilizing methodologies and tools that will help develop content

  - Developing a Plan that meets Federal and State requirements

- *Note: Funding between five-year plan years will be evaluated on the performance and progress on projects identified in each plan.*

Guidebook Organization

- Ch 1: Introduction
- Ch 2: State and Federal Plan Requirements and Regulations
- Ch 3: Lead Agency and RCC Representation, Rules and Responsibilities
- Ch 4: Coordination Plan General Requirements and Content
- Ch 5: Outreach and Community Engagement
- Ch 6: Existing Conditions Assessment
- Ch 7: Goals, Strategies and Prioritization
- Ch 8: Plan Documentation and Adoption
- Ch 9: Plan Annual Review and Amendment
- Ch 10: Resources and Contact Information

Guidebook Appendices and Tools

Appendix A: Memorandum of Understanding

Appendix B: Bylaws

Appendix C: Coordination Plan Organization and Checklist

Appendix D: Methodology to Determine Trip Generators

Appendix E: Methodology to Create Coordination Area Map

Appendix F: Methodology to Collect/Exhibit Demographics

Appendix G: Methodology to Create Transit Need Index Map

Appendix H: Example of Transportation Provider Survey

Appendix I: Transportation Service, Modes, and Models

Appendix J: Vehicle Utilization Chart

Appendix K: Example of Goals and Strategies Matrix

Appendix L & M: Timelines

Appendix N: Coordination Assistance RFP

Chapter 2: State and Federal Plan Requirements and Regulations

Federal Coordination Plan Requirements

- Section 5310 Funding **Dependent on Inclusion in Plan**
- Stakeholder Engagement & Public Involvement **Process Specifics**
- **Urbanized Areas**: Project Funding Requires Inclusion In MTP, TIP, and STIP
- **Non-Urbanized (Rural) Areas**: Projects Must be In or Consistent with Texas Statewide Long-Range Transportation Plan and STIP
- **Must Align** with Title VI, ADA, other Civil Right Requirements

FTA circular C 9070.1H, effective November 1, 2024 (FTA, 2024)

Texas Builds On Federal Requirements

Intent:

1. to **eliminate waste** in the provision of public transportation services;

2. to **generate efficiencies** that will permit increased levels of service; and

3. to further the state's efforts to **reduce air pollution.**

Requirement to Identify:

1. **Overlaps and gaps** in public transportation services and services more effectively provided by private transportation

2. **Underused equipment** owned by public transportation providers

3. **Inefficiencies** in the provision of public transportation service

Texas State Management Plan (TxDOT, 2024) and Chapter 461 of the Texas Transportation Code (Texas Legislature, 2003)

Chapter 3: Lead Coordination Agency & Region Coordination Committee (RCC)

Lead Coordination Agency Responsibilities

Mission & Bylaws *BEST PRACTICE*	Identify RCC Members	MOU: LCA & RCC Organizations	Mission Statement & Bylaws
Ensure Compliance	Record & Retain Records	Communicate to TxDOT & Public	Appoint Contact
	Amend Plan		

Team of Coordination Champions—The RCC Responsibilities

Determine Officers

Set Meeting Schedule

Active Participation

Assist with Survey & Data Gathering

Identify Collaboration Opportunities

Engage Stakeholders

Provide Plan Consensus

Chapter 4: Coordination Plan General Requirements and Content

Representation Requirements

- Seniors
- Persons with disabilities
- Low-income residents
- Zero car households
- Youths
- Residents with limited English proficiency
- Veterans
- Clients of workforce agencies (job seekers)

Plan Key Elements

- Public Outreach & Community Engagement

- Geographic Area Assessment

- Demographic Assessment

- Transportation Assessment

- Transportation Needs & Gaps Assessment

- Goals, Strategies, Projects Prioritization

- Approvals from LCA & RCC

Coordination Guidebook	Your Coordination Pan
Ch 1 Introduction	Ch 1 Introduction
Ch 2 State and Federal Plan Requirements and Regulations	Ch 2 Public Engagement
Ch 3 Lead Coordinating Agency (LCA) and Regional Coordinating Committee (RCC) Representations, Roles and Responsibilities	Ch 3 Geographic Assessment
Ch 4 Coordination Plan General Requirements and Content	Ch 4 Demographic Assessment
Ch 5 Public Outreach and Community Engagement Plan	Ch 5 Transportation Services Assessment
Ch 6 Existing Conditions Assessment	Ch 6 Needs and Gaps Assessment
Ch 7 Goals , Strategies and Prioritization	Ch 7 Goals, Strategies & Projects
Ch 8 Plan Documentation and Adoption Process	Ch 8 Priorities
Ch 9 Annual Review and Amendments	Ch 9 Approvals
Ch 10 Resources and Contact Information	
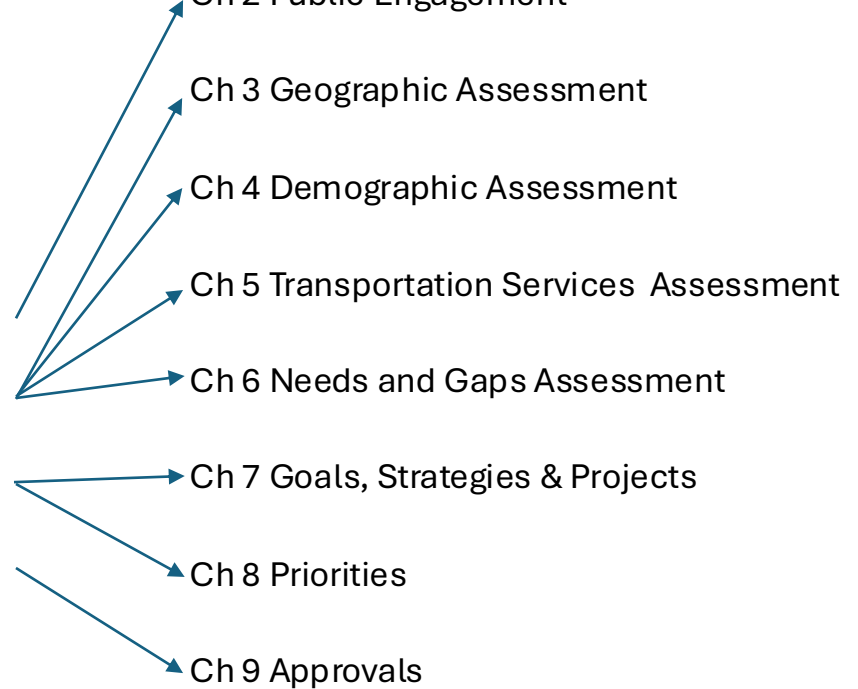
Chapter 5: Outreach and Engagement

Public Outreach/ Community Engagement Why It Matters

Coordination Plans must be developed through a process that includes input from:

- Public, private, and nonprofit transportation providers,

- Human service agencies,

- Advocacy groups for seniors and individuals with disabilities, and

- Representatives from underserved populations.

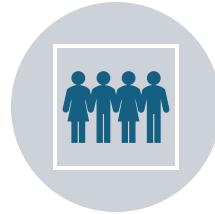# Opportunity for first-hand input about needs

Identify and *understand* regional needs and gaps

Accurately assess existing services

Discover opportunities and efficiencies

Plans reflect community needs and *values*

Target Populations
Who else?

- Seniors
- Persons with disabilities
- Low-income residents
- Zero car households
- Youth
- Residents with limited English proficiency
- Veterans
- Clients of workforce agencies (job seekers)

Components of the Engagement Plan

A comprehensive engagement plan will ensure that engagement is robust and meaningful

- Audiences/Stakeholders
- Recruitment
- Events
  - Time
  - Location
  - Type
  - Special Accommodations
  - Materials
- Feedback

Audiences

- Specifically identify and list all stakeholders
  - Aim for broad representation and let them decide if they want to participate or not
- Document how you will recruit participation

Events

Meeting locations
- Vary times and day
- Go where the audiences already are

Meeting format
- Town halls
- Small group discussion
- One-on-one interviews
- Pop-up events

Special needs or accommodation

- Virtual Meetings
- Website
- Apps or games

Materials

- Develop materials that allow the audience(s) to participate meaningfully
  - Use plain language
  - Translate, as necessary
  - Use a mix of text and graphics
  - Use large print
- Consider room layouts
- Consider feedback mechanism(s)

Engagement Tools and Techniques

Engagement plan approved by the planning committee identifies the most appropriate tools and techniques for each audience

Primary tools are **questionnaires** and **focus groups**

Websites are useful for general public feedback

Provider Survey

What transportation services exist?

Who are they for?

Where do they operate?

When do they operate?

How do they operate?

What are the service policies?

What is the ridership?

What are the costs?

What are the perceptions on unmet needs?

Where are the opportunities?

User Needs Survey

- Qualify and quantify the met and unmet needs of riders, clients, customers

- Develop a strategy to reach a broad cross section of users

Focus Groups

- Allow for more in-depth conversation

- May be more appropriate for particular audiences

- Allow for expansion of ideas – what is working and why and what is not working and why not

- Can also assess awareness of opportunities and provide education

Website

- Good mechanism for information about plan development

- Should provide opportunity for feedback
  - Questionnaire for needs assessment
  - Comment form for plan feedback

- Publicize website via stakeholder organizations

- Use social media to spread the word about engagement opportunities

- Make sure websites are accessible!

Documentation

If it isn't documented, it didn't happen!

OUTPUTS

- Number of meetings held, times and locations, transit availability, building accessibility (maps are helpful)
- Attendance, categorized if possible
- Use of interpreters/translators
- Materials used
- Website and social media analytics

OUTCOMES

- Summary of input received
- Analysis of input received
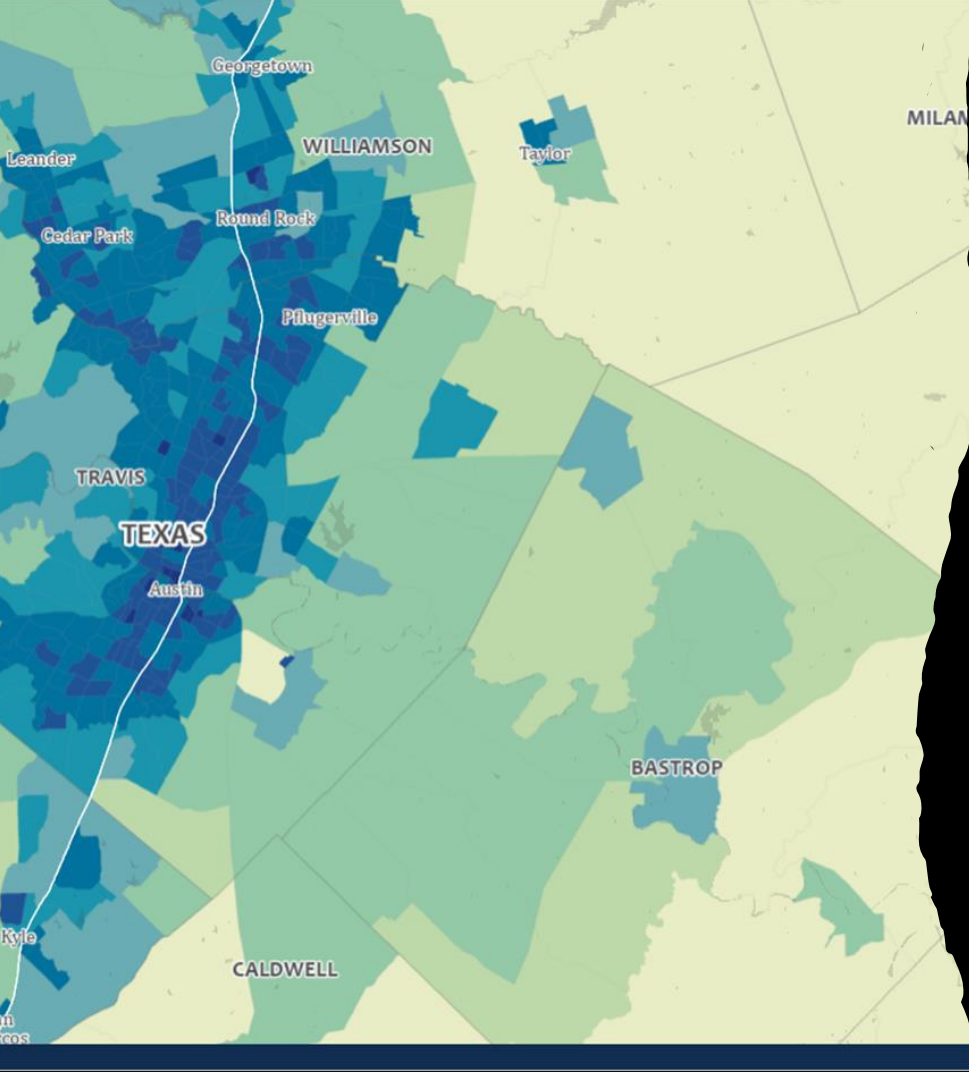
Chapter 6: Existing Conditions Assessment

Why It Matters Existing Conditions Assessment Identifies

Geographic and demographic data, mapping transit need and where people need to go

Existing public, private and non-profit transportation services and mobility management programs

Existing vehicle fleets, sizes, configurations, and when/ how utilized

Existing & new technology

Unmet needs, gaps, & prioritization – results in development of projects, programs and strategies
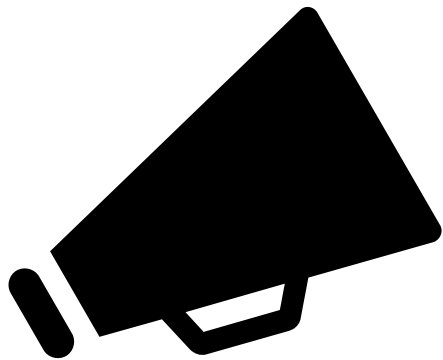
Existing Conditions Assessment

Geographic Area	Demographic Data	Transportation Providers
Mobility Management Programs	Vehicle Inventory and Utilization	Technology

Region Transportation Needs & Gaps

Geographic Area Assessment
Typically a Series of Maps

Useful and Powerful Tool to Identify:

Jurisdictional boundaries

Major destinations

Existing transportation

Coordination opportunities

Transportation gaps
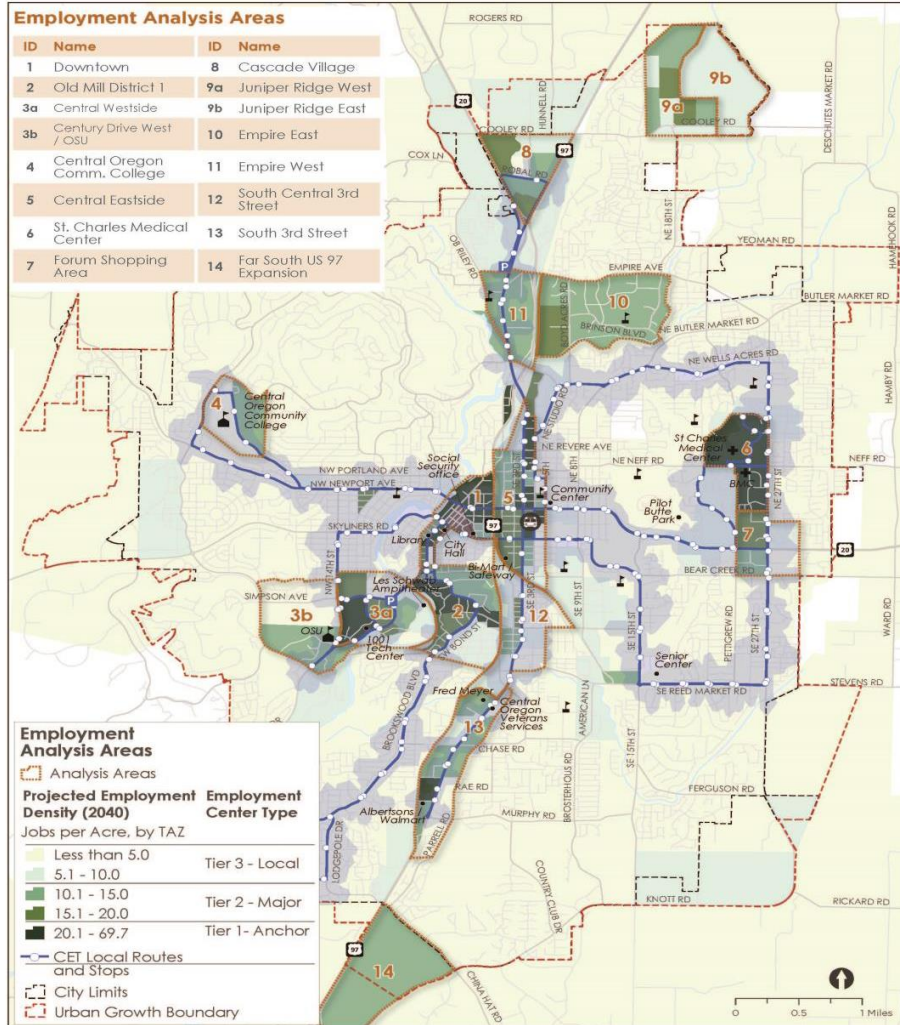
Demographic Area Assessment
Typically a Series of Maps

Useful Tool to Identify:

Population density and growth

Target populations

High transportation need/demand

Types/ modes of transportation
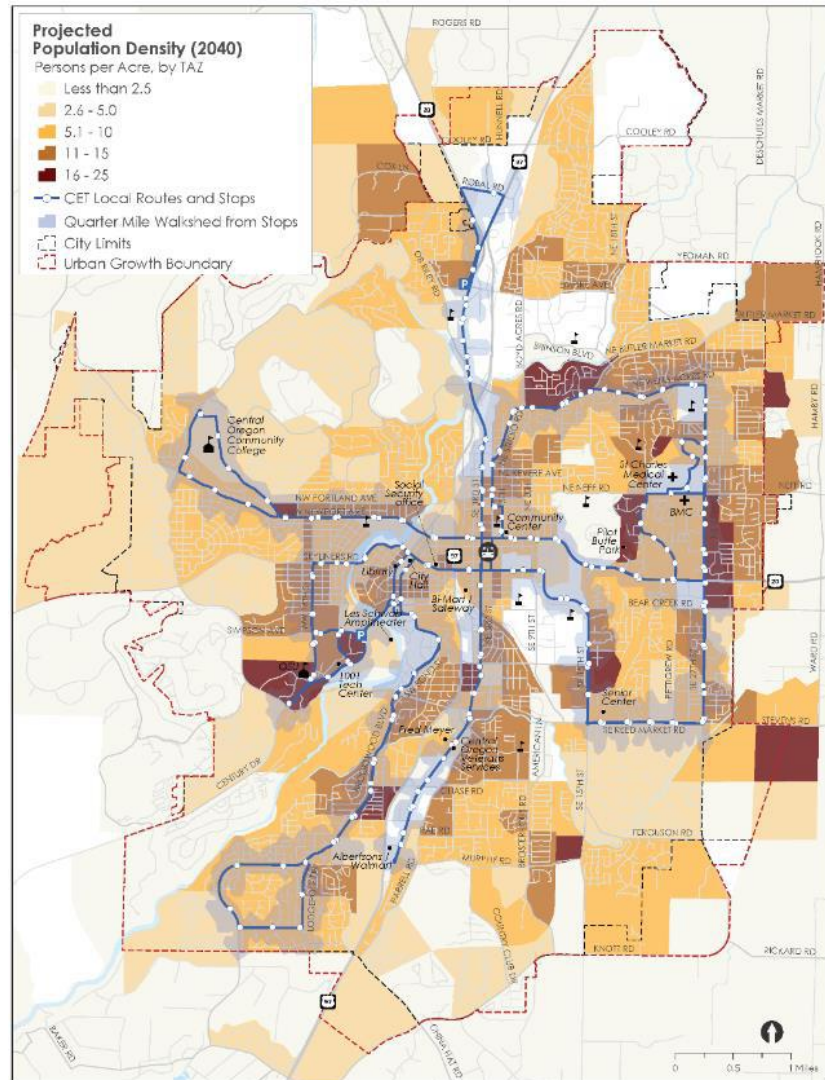
Geographic Area Assessment Tools

Appendix D. Methodology to Determine Major Trip Generators (pg. D-1)

Appendix E. Methodology to Create a Coordination Area Map (pg. E-1)

Appendix F. Methodology to Collect and Exhibit Area Demographics (pg. F-1)

Online Planning Map Tool

- Useful for area boundaries
- Contains
  - Coordination Planning Regions
  - Transit Districts
  - Cities
  - Counties
  - Urban Areas
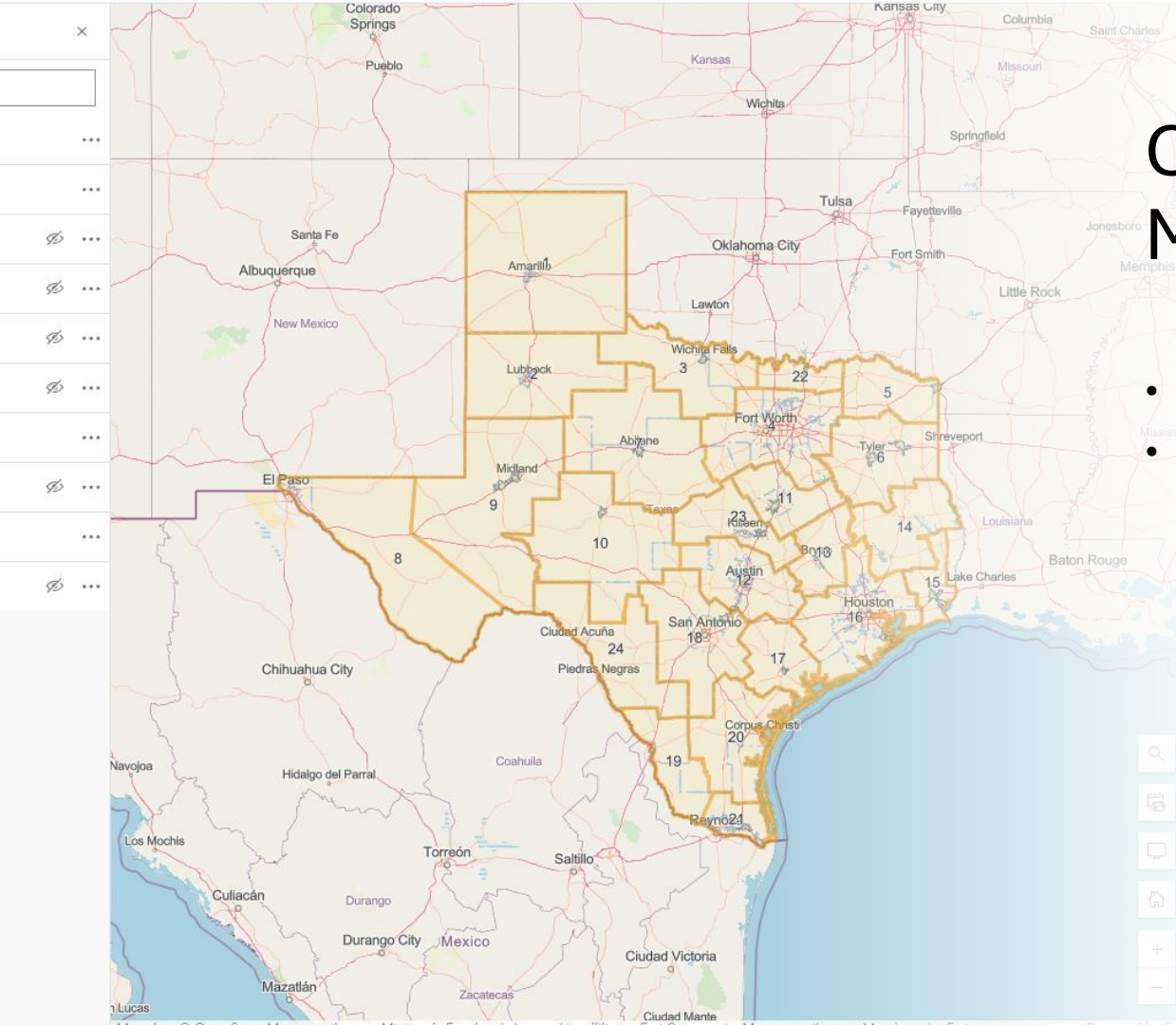
Transportation Provider Assessment

Makes up a large portion of the Plan

Provides a crucial component to understanding unmet need

Best practice is to use a Transportation Provider Survey (Appendix H)

Transportation Provider Profiles

Provider Survey/Questionnaire

- General Information
- Service modes, models and policies, including existing instances of coordination
- Fleet inventory and utilization
- Vehicle operators
- Supporting technology
- Ridership, Operating Costs, Revenues
- Perceptions of needs met and unmet

Survey with Follow-up or Interviews

- Whatever makes sense to get data

Plot Provider Services on County/Regional Maps

- Create Maps for different days/time periods
- Distinguish services by client/trip eligibility

Fleet Inventory and Utilization Assessment

- The fun part

- The hard part

- Where the rubber meets the road

- Useful Tips:
    - Use the template in the Appendix J, and right-size it for your community.
    - Disarm defensiveness with cost-allocation.
    - Be curious and approach your inventory like a puzzle.

Supporting Technology

- Another important puzzle piece
- Varying degrees of technical complexity
- Important to consider technological appropriateness
- Key questions to answer:
  - What systems are used for collecting trip requests and assigning those requests to drivers and vehicles? Is it working? How do you know?
  - What are the primary objectives of the technology being used? Are those goals being met? How do you know?
  - Do the goals for the technology match your goals as a coordinating body?
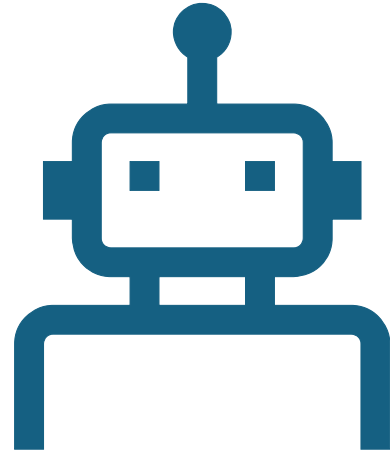
Identify & Document Mobility Management Programs

Mobility Management Definition

Document Organizations involved in Mobility Management activities **by definition.**

Programs and services that:

- Manage and/or deliver **coordinated transportation services**
- Enhance **individuals' access** to those services

Examples of Mobility Management Services and Programs:

- Development coordination plans
- Implementation of coordination strategies (e.g., via cooperative agreements; joint use agreements or purchase of service agreements)
- Provision of travel training
- One-call/one-click programs (call centers/technology associated with coordinated services)
- Co-procurement of supporting technology to support multiple services
- Educational programs for transportation access

Document

- Document region organizations involved in Mobility Management, document the services/functions provides, and identification of gaps/ unmet need in MM.

Profiles of Mobility Management – organization, services or program functions, any metrics evidencing meeting unmet needs

Analyze, Identify and Prioritize Unmet Needs

Combine Regional or County maps

TNI Map

Major Destination Map (or O-D Map)

Transportation provider maps service areas

Analyze maps to identifying where and when certain populations can and cannot get to major destinations (needed services, hospitals and medical centers shopping, employment opportunities) for certain trip types**.**

Sync analysis with provider survey responses and focus group feedback on met and unmet needs

Rank the unmet needs by priority in a workshop setting

Transportation Needs Index

- TNI is usually categorized by small geographies such as block groups or census tracts. Includes key demographics such as:
  - Seniors
  - Persons with disabilities
  - Low-income individuals
  - Zero-Car Households.

Legend

Transit Need Index
- 0.000 - 0.026
- 0.026 - 0.344
- 0.344 - 0.479
- 0.479 - 0.656
- 0.656

Source: 2019 ACS 5-Year Estimates

Origin-Destination Data

- Can be used if data is available (typically from CAD-AVL software).
- Useful for showing demand and identifying service gaps.

Examples of Unmet Needs

- Limited-service areas or times.
- Limited services for rider types or specific trip purposes due to missions or grant regulations.
- Limited services due to a low operational budget and high operational costs.
- A lack of accessible vehicles or underutilization of equipment.
- A lack of supporting technology.
- Insufficient personnel (e.g., a lack of trained drivers).

Prioritizing Unmet Needs

- Discuss each unmet need
- Vote to identify a priority order
- Can be based on quantitative and qualitive measures
- Can group unmet needs into high, medium, and low priorities
- Forms the basis for developing goals, strategies and approaches

Lunch

- Grab a bite to eat.
- Listen to our guest speaker: **Laura Brown**

Guest Speaker

Laura Brown

RLS & Associates, Inc.

-Chief of Business Development

-Director of Planning Initiatives

It's Time to Coordinate!

What is Coordinated Transportation?

- Integrating multiple transportation systems or modes
- Improving or expanding access to resources and services
- Optimizing the use of resources
- Minimizing duplication of services
- Understanding the unmet needs and collaborating to solve problems
- Maximizing available funding
- Sharing information
- Promoting sustainable transportation alternatives

Why Do We Coordinate Transportation?

- Support Healthy Community Initiatives
- Connect People with Employment, Health Care, Socialization
- Help People Overcome Barriers to Accessing Resources
- Reduced Congestion
- Maximize Efficiency
- Improve Service
- But this is really why we do it….

    https://youtu.be/lELZoTkiY4g

Types of Coordinated Transportation

- Multi-Modal Integration
  - Buses, vans, walking, biking, trains, cars,….

- Shared Services
  - Human services, public transit, ride-sharing, on-demand, demand-response, carpools, shuttles, …..

- Route and Schedule Coordination
  - Aligning schedules and routes, transfers, connections, …..

- Information Sharing and Technology
  - Real-time vehicle-location information, customer-facing apps, scheduling technology, GTFS feeds,…..

Where Do We Start? How Do We Keep Going?

- With So Many Avenues and Options…
  - Where Do We Begin?
  - How Do We Prioritize Goals?
  - Who Should Be Included?
- My Advice is to
  - Coordinate Around the Issues that Matter Most to **Your** Community
  - Start with Immediate Wins and Keep the Momentum Rolling
  - Be Patiently Persistent because Sometimes It Takes Time to Get There

Case Studies

Let's Talk About Some Success Stories for Inspiration

Miami Valley
Regional Planning Commission

- Greater Region Mobility Alliance
  - Regional Coordinating Committee
    - Created to implement transportation goals and strategies
    - Meets quarterly
  - Members
    - All Section 5310 grantees/potential grantees
    - Non-profit agencies
    - Public transportation providers
    - Government organizations
    - Faith-based organizations
    - Human service agencies
    - Businesses
    - Economic Development Offices

MIAMI VALLEY
COORDINATED
Public Transit-Human Services
TRANSPORTATION PLAN

Miami Valley RideFinder
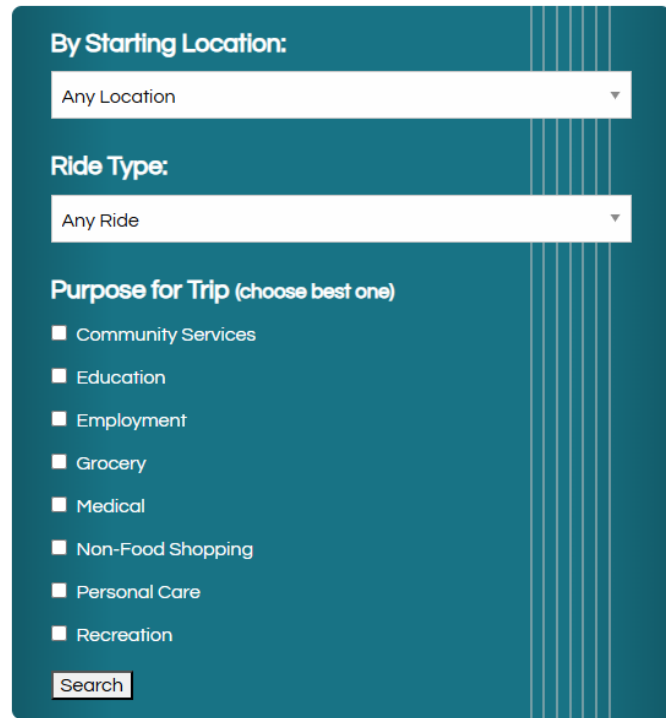
- **Description**:
  - One-stop website for information
  - Focus on public, non-profit & volunteer transportation
  - Easy search options
- **Impact**: Outreach
- **Partnerships**: Miami Valley Regional Planning Commission, GreenCATS Public Transit
- **Funding**: Section 5310 Mobility Manager program, local grants

Ridelink & RideConnect

Transportation Resources Information & Volunteer Driver Program

- **Description**:
  - Call center
    - Ridelink makes referrals to transportation providers
    - RideConnect is a Volunteer Driver Program
- **Impact**:
  - RideConnect grew to 25 drivers in 3 years
  - Drivers logged 93,341 miles from July 2021 to September 2024
  - Volunteers provided more than 3,000 rides
- **Partnerships**:
  - Catholic Social Services, Ohio DOT, local transportation providers
- **Funding**:
  - Ohio DOT, local resources

Central Indiana RTA

1. Commuter Connect Resources
   - Carpool
   - Van pool
   - Bus
   - School Pool
   - Bike or Walk
2. Workforce Connect
   - Zero Fare Rides from Indy to Industrial Parks
     - Economic Improvement Districts
3. County Connect
   - Trip Planner for information and resources for travel across county lines

"Let us help you find a ride in Central Indiana."

CICOA
Aging & In-Home Solutions

My Freedom Program

"Transportation for people with disabilities and seniors around Central Indiana counties"

- **Description**:

  - Vouchers: 25% reduced fares on any participating provider

  - Option for people experiencing a disability or anyone over the age of 60

  - Affordable cross-county trips for the 7-county region

  - Affordable trips within a single county for the suburban ring counties

- **Impact**: 2017: Provided 2,200+ trips || 2023: Demand exceeds capacity

- **Partnerships**: Local cab company (provider) || Central Indiana RTA

Funding: FTA Section 5307, Title III-B or Medicaid, local foundations

Tennessee Human Resource Agencies
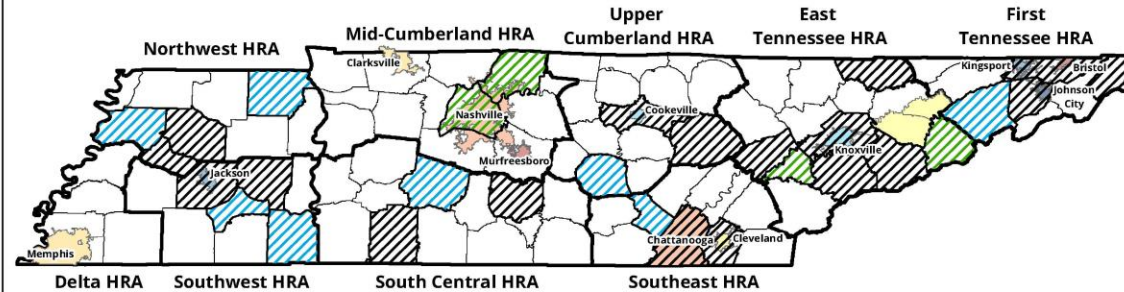
Southeast Tennessee

- **Description**:
  - Southeast Tennessee Area Agency on Aging and Disability – MyRide Tennessee Volunteer Driver Program
  - Bus Stop Accessibility Improvements
  - CARTA Care-A-Van Service Extension to expand paratransit service area
- **Impact**: Expansion of service to high-need zip codes and improves service for people with low incomes, older adults, individuals with disabilities
- **Partnerships**: SETAAAD (volunteer program), Public Transit Providers
- **Funding**: Area Agency on Aging and Disability (volunteer program), FTA Section 5310 Program, Donations

Washington County Trip Generators

Johnson City Human Service Transportation Plan
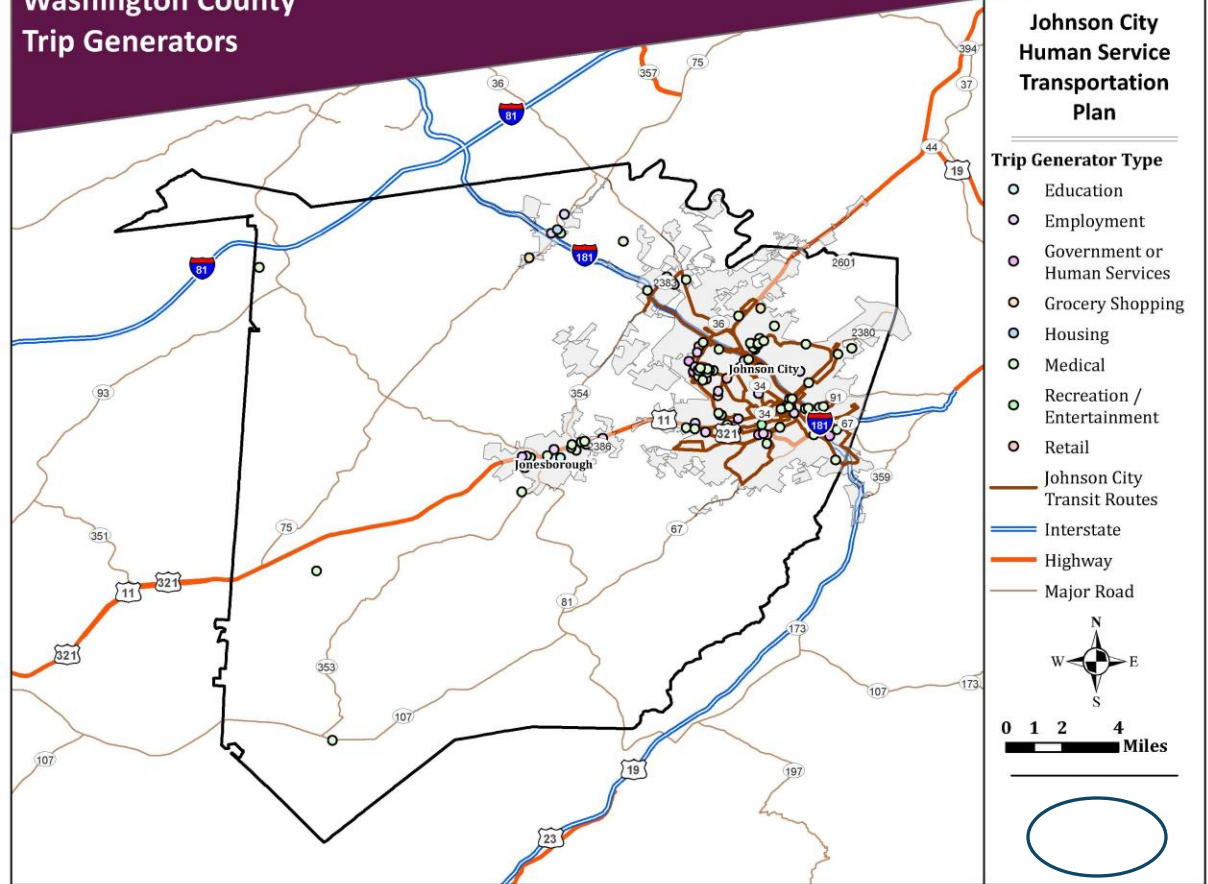
Johnson City Transit Job Access

"Bridge the transportation gap"

- **Description**:
  - Trips outside of the fixed route operating hours or service area boundaries
  - Public transit operates Job Access trips with small buses or vans
  - Reservation, curb-to-curb service
- **Impact**: Access to employment
- **Partnerships**: Vocational Rehabilitation, Courts and Corrections Department, local employers, non-profit programs that focus on improving access to employment
- **Funding**: US DOT, TNDOT

OMEGA Region Rate-Setting Pilot

Belmont, Carroll, Columbiana, Coshocton, Guernsey, Harrison, Holmes, Jefferson, Muskingum and Tuscarawas Counties, Ohio

Why do Restrictions on Sharing Exist?

- Background:
    - Transportation vehicles or services are often restricted to clients of specific state or federal programs
        - This restriction often leads to inefficient use of resources and unused capacity

- Why do you think these restrictions exist?

Why Do Restrictions Really Exist?

- Restrictions are often attributed to Federal requirements

- This is a misperception of Federal intent

- Federally funded vehicles and transportation resources **can** be shared with other Federal and community agencies that have a transportation role, as long as costs can be allocated appropriately

- The barrier in effective sharing of resources is cost allocation --- Hence, the rate-setting pilot….

Regional Rate-Setting Pilot Program

- Purpose:
  - To provide a basis for allocating costs and establishing rates when clients of different programs use a transportation service
  - To standardize rates and provide a foundation for Federal Fund Braiding
    - Where funding from one program can be used to match other Federal programs
- Methodology:
  - Provide a rate-setting tool for the OMEGA Region
    - Transportation providers enter their expense data and generate a price per unit
      - Four transportation providers have begun using the tool so far
  - Coordinate Scheduling
    - Transportation providers will use a shared scheduling technology to coordinate trip requests among the participating providers and appropriately bill the trip to the respective funding sources at the rate identified through the rate-setting tool

Thank You!

Question?

Chapter 7: Goals, Strategies and Prioritization

Goals, Strategies, Prioritization
Why It Matters

Addresses the *prioritized* unmet regional needs

Results in a set of actions, programs, projects that address unmet need

Prerequisite for Section 5310 grant project funding

Examples of Goals

Improve	Improve the sustainability of the transportation network for the target populations (e.g., seniors, PwD, individuals with low income, veterans, etc.)
Expand	Expand the capacities of transportation providers to meet the unmet needs of the target populations
Create	Create partnerships between/among providers that eliminate barriers to regional mobility of the target populations
Eliminate	Eliminate price as a barrier to reliable options for target populations
Enhance	Enhance ways for target populations to learn about and access transportation options

Examples of Coordination Strategies

Cooperative Agreements

- Sharing information
- Joint procurements

Joint Use Agreements

- Purchasing support services
- Vehicle sharing
- Facility sharing
- Technology sharing

Purchase of Service / Consolidation

- Purchasing rides
  - Commingled
  - Separate
- Consolidated system

Case Study: Co-Procurement of Technology

- Large metro region

- 5 different organizations want to coordinate
  - ADA Paratransit
  - 5310 / Older Americans Act Program
  - Regional Medicaid NEMT broker
  - Local innovative not-for-profit transportation provider
  - Local senior centers

- $1.7M Veterans Grant.

- Software solution procurement.

- How many rides need to be coordinated to pay for the technology solution?
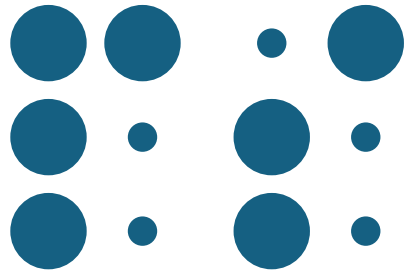
Discussion questions

- What is the right order for the following activities?

  - Set a budget based on value of achieving goals
  - Purchase new technology
  - Clarify goals
  - Assign value to goals

- Who benefits the most from new transit technology?

  - Software vendors
  - Riders
  - Transit agency staff

Goal – Needs Addressed – Priority Level

Goal	Scope	Needs Addressed	Priority Level (1 to 4)	Relative Cost	Strategies
Create partnerships between providers that will eliminate the barriers to regional mobility for seniors and individuals with disabilities	Multicounty/region (specify)	• Improved resources/ processes to find providers • Increased provider capacity • Improved access to multilingual information	3.4	$$$$	1. Establish a central call center for scheduling trips with any partner provider for regional destinations
	Region (specify)	• Improved access to shopping/ medical appointments • Improved access to safe/ appropriate transportation • Improved resources/ processes to find providers	3.4	$	2. Create/distribute an inventory of affordable/ senior housing locations accessible to public transit and/or agency transportation programs
	Individual county (specify)	• Decreased cross- jurisdictional boundaries • Increased same- day rides • Increased provider capacity	3.2	$$ to $$$	3. Establish private/ volunteer demand- responsive services to provide first-/last-mile trips that cross the jurisdictional boundaries of public transit operators

Goal – Needs Addressed – Priority Level (cont'd)

Goal	Scope	Needs Addressed	Priority Level (1 to 4)	Relative Cost	Strategies
Create partnerships between providers that will eliminate the barriers to regional mobility for seniors and individuals with disabilities	Multicounty/ region (specify)	• 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

Chapter 8 & 9:
Plan Documentation,
Annual Review and
Amendment Process

Why It Matters:

- The Plan must include all required elements prior to TxDOT submittal.

Appendix C provides a checklist of all elements that must be included in each region's Plan.

FTA and TxDOT require input/feedback:

- Public, private, and nonprofit transportation providers
- Human service agencies
- Advocacy groups for seniors and individuals with disabilities
- Representatives from underserved populations

Chapter 8 Plan Finalization and Adoption Process

Put Draft Plan on your website

Send links to (seeking feedback from:
- RCC members
- Regional PTC(s)
- Provider Survey Responders
- Others on Distribution List

Use feedback to revise plan, as needed; include the RCC in this process

Put the Final Draft Plan out for public comment; repeat with any changes

RCC votes to adopt the Plan. LCA rep and RCC members sign the document

Chapter 9 of the Plan to include adoption materials

Submit Plan to PTN (by October 2026)

PTN may send it back if there are omissions and will supply a timetable to re-submit the Plan

Chapter 9: Annual Review and Amendments

Why it Matters

An annual review can help identify interim changes and new or revised strategies that are immediately needed to address significant changes.

The Benefit:

- Can pave the way for new or revised Section 5310 grant applications in the next grant cycle
- Can ease the lift in the next five-year plan development.

Recommended to ensure accuracy/update of:

- Geographic and demographic characteristics
- Service profiles (e.g., policies, ridership, etc.)
- Decrease in - or re-prioritization of - unmet needs due to:
  - New service providers or expanded programs
  - Implementation of coordination efforts
- New/revised goals and strategy prioritization

Chapter 9 Annual Amendment Process

Amendment might include:

- Addition of provider profile
- Removal of completed goals
- Elimination of unmet need

RCC to discuss whether an amendment is needed and how the changes are is beneficial

LCA/RCC need to prepare :

- A summary of the changes
- Rationale for each change
- The impact of each change, especially re: unmet needs
- Where the changes appear in Plan

RCC votes to adopt the Amendment, followed by LCA submitting Amendment to PTN

Breakout Session
Introduction and Grouping

Breakout Groups

Region	Table	Facilitator and Scribe
Central Texas, Gulf Coast, Lower Rio Grande, North Central Texas, Permian Basin	1	Ross Peterson and Brigida Gonzalez
East Texas, South East Texas, South Plains, Texoma	2	Bolivar Bolanos and Katie Hill-Briones
Concho Valley, Deep East Texas, Golden Crescent, Nortex	3	Tina Geiselbrecht and Bridgett Hlavinka
Ark Tex, Coastal Bend, Middle Rio Grande, Panhandle, South Texas	4	Greg Davis and Bul Mabil
Abilene, Alamo Area, Capital Area, Heart of Texas	5	Jimmy Cardenas and Irma Flores

Break/Refreshments

Reports from Each Group

Coordination Timeline and Milestone Dates

Coordination Planning Project Timeline #1

February to May 2025

(Appendix L)

Start	End	Task	Feb	Mar	Apr	May
2/17/2025	2/21/2025	**Each LCA decides whether it will need a consultant**	▓			
2/24/2025	3/21/2025	Applications open in IGX grant system	▓	▓		
2/24/2025	4/16/2025	**RFP completed**			▓	
4/11/2025	4/11/2025	PTN negotiations with agencies complete, grant amounts set			▓	
4/16/2025	4/16/2025	**Date RFP issued**			▓	
4/25/2025	4/25/2025	**RFP questions due**			▓	
5/2/2025	5/2/2025	**RFP questions answered**				▓
5/16/2025	5/16/2025	**Proposals due – this leaves only 6 weeks to submit a proposal, which is ok**				▓
5/19/2025	5/30/2025	**Proposals evaluated, award made**				▓
5/21/2025	5/21/2025	Commission meeting, minute order award				▓
5/26/2025	5/26/2025	PGAs distributed				▓

Coordination Planning Project Timeline #1

June 2025 to February 2026

(Appendix L)

			Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
6/1/2025	6/1/2025	PGA begin date (or later, dependent on PGA execution)									
6/1/2025	6/1/2025	Consultant contract (or NTP) executed (dependent on PGA execution)									
6/2/2025	6/2/2025	Consultant project begins for a 16-month project									
1/31/2026	3/1/2026	Interim report review									

Coordination Planning
Project Timeline #1

**March 2026 to
February 2027**

(Appendix L)

			Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
8/31/2026	8/31/2026	**Draft final ready for public comment (15 months from start)**												
9/1/2026	9/15/2026	**Public comment period**												
9/16/2026	9/30/2026	**Public comments woven into plan; final plan completed; consulting project ends**												
10/1/2026	11/30/2026	**Plan submitted to TxDOT**												
12/1/2026	2/28/2027	Final plan review (rolling)												
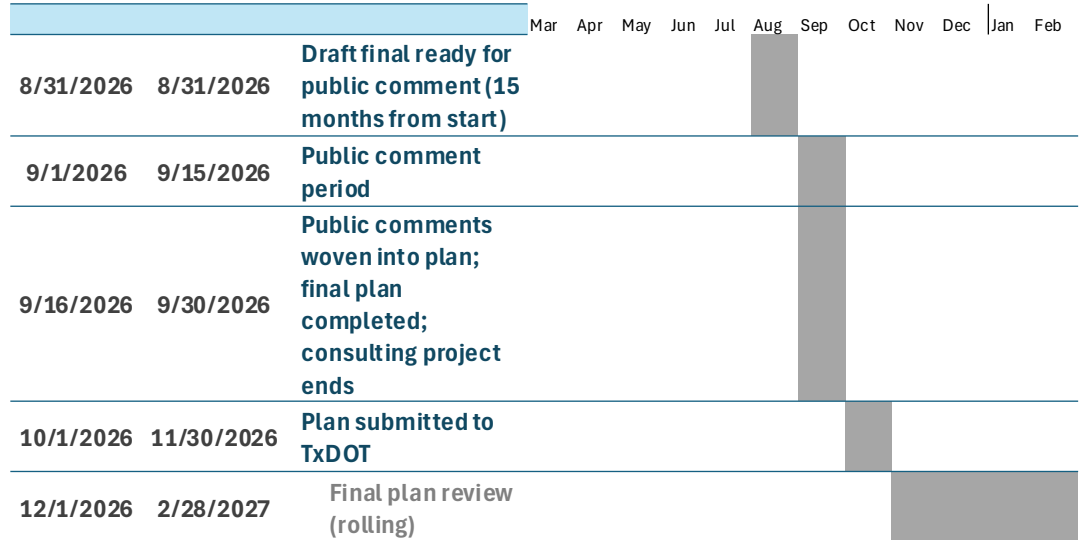
Coordination Planning Project Timeline #2 (Appendix M)

Task	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Stakeholder Engagement (Ch 2)	RCC Kickoff Meeting; Outreach Plan Completed	Provider Survey Development; Launch Survey	Survey Completed; Follow-Up Interviews; Focus Group Planning	Focus Groups; RCC Quarterly Meeting			RCC Quarterly Meeting			RCC Quarterly Meeting			Stakeholder/Public Feedback; RCC Workshop		Stakeholder and Public Feedback	RCC Quarterly Meeting	
Geographic Assessment (Ch 3)		Geographic Assessment															
Demographic Assessment (Ch 4)			Demographic Assessment														
Transportation Services Assessment (Ch 5)		Provider Survey Development; Launch Survey	Survey Completed; Follow-Up Interviews	Begin Preparing Transportation Provider Profiles	Transportation Provider Profiles Completed		Assess Service Duplication and Gaps by County, Service Days and Times, Eligible Customers, and Trip Purpose										
Interim Report							Interim Report due on or before Dec 24										
Review of Interim Report (PTN, TTI and HNTB)						PTN Review										

Coordination Planning Project Timeline #2 (cont'd)

Task	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Transportation Needa and Gaps Assessment (Ch 6)									Identification and Prioritization of Unmet Needs								
Goals and Strategies (Ch 7)											Development of Goals and Strategies						
Prioritization of Goals and Strategies (Ch 8)													Prioritization Workshop				
Draft Final Plan and Final Plan														Draft Final Plan		Final Plan	
Plan Approval (Ch 9)																RCC Approval	
Submittal of Approved Plan to TxDOT																	Submittal of Approved Plan to TxDOT

Webinar Dates
Tuesday, February 18 at 9 a.m. – 10:30 a.m.
Tuesday, February 25 at 2 p.m. – 3:30 p.m.

Deadline: Friday, March 21st

Reminder: RPTCP Metrics

Wrap-Up and Review

Live long and
coordinate

Thank You