

Transit Inclusive Planning for the Helena Area

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1 Project Summary

Lewis and Clark County was one of seventeen communities across the nation awarded Transit Planning for All grant, sponsored by the Department of Health and Human Services' Administration for Community Living¹. The project in Lewis & Clark County focused on empowering people with mobility limitations including seniors, adults and youth with physical and/or cognitive disabilities, to be actively involved in planning and implementing coordinated transportation systems in the Helena area. The County partnered with the Helena Area Transit Service (HATS) and the Helena Transportation Advisory Council (HTAC) to complete this Helena Area Inclusive Transit Planning (HITP) Phase 1 Grant.

The project built on the findings, recommendations and relationships developed through the recently completed five-year Helena Area Transit Development Plan (TDP) Update. Both projects found strong community support for improving the current transit service. This support includes responding to the identified needs of people with mobility limitations.

The HATS TDP focused primarily on community needs and services within the City of Helena. The HITP project focused on the following goals:

- Developing a clearer picture of the transportation needs of stakeholders in the county, especially the needs of residents in areas of the county like the “North Valley” that are not currently served by the Helena Area Transit Service (HATS).
- Bringing stakeholder organizations together to create a strong voice for the transportation needs of people with mobility limitations who cannot drive to access work, educational, social and recreational opportunities, and essential services like health care.
- Build consensus on actions and next steps for better serve the needs of the older population and those with disabilities in an economically sustainable and effective manner.

During the HITP project, stakeholder organizations and consumers strongly articulated a growing demand for transportation services in the city and beyond, along with a strong desire for the community to improve and expand transportation options accordingly. The current situation poses significant hardships to people with mobility limitations. They feel trapped in their houses, they face great inconvenience, and they often face significant time and cost to access essential services, jobs, and other destinations.

¹ For more information see <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=3265>



1.1 Helena Area Stakeholders' Mission, Vision, and Rules of Procedure

The national project sponsors tasked the local project working group to develop the following mission, vision, and rules of engagement. While these were developed specifically for this project, the working group envisioned the mission, vision and rules evolving to guide future collaborative efforts.

HITP Mission Statement

We believe that community stakeholders should be empowered to be actively involved in planning and implementing transportation services that are essential to their independence, community engagement, and quality of life. Transportation planning should engage people with mobility limitations who cannot drive including seniors, people with physical or cognitive disabilities, veterans, citizens with a low income, and youth.

Vision

Transportation services help people increase their independence, making it possible for them to go when and where they need to go.

Actions

- Identifying the needs of people with mobility limitations through targeted outreach, public meetings and research.
- Developing a model for inclusive transit planning.
- Recommending proposals for an inclusive, coordinated transportation system that will be sustainable within the constraints of limited transit funding.
- Exploring the potential to extend coverage to areas that are not currently served.
- Exploring the potential to form a stakeholders' coalition.

Participants

Organizations representing and serving people with mobility limitations are collaborating with other community leaders.

Helena Area Stakeholders' Rules of Procedure

Who should be included?

The working group is open to participation by any organizations that represent or serve people with mobility limitations including seniors, adults and children with physical and cognitive

disabilities who cannot drive to access work, educational, social and recreational opportunities, and essential services like health care. Overall, the efforts of this project should be inclusive and work to engage a broad range of people who need transportation assistance. Recommendations that are developed to improve transit service should consider needs and benefits for choice riders whenever possible, so that all residents will benefit and service changes will not segregate people with mobility limitations from the rest of the population.

How will communication be handled?

The project team will email working group members requesting comments and recommendations on the following: interviews, invitation lists for activities, meeting agendas, notes from interviews and activities, and the draft of the final project report. Because of the project's compressed timeline, responses will need to be received quickly in order to be incorporated. The project team will specify deadlines for comment whenever it sends communications.

How will decisions be made?

The working group's goal is whenever possible to find consensus on outreach approaches and inclusive planning recommendations. The group is working towards building a coalition and decision-making rules will be revisited as part of the coalition-building process. At this stage, for all grant activities, to the extent possible given limited funding and time constraints, the project team will actively seek input from working group members about the highest priority stakeholders to target, and outreach strategies that will include a broad cross-section of people with mobility limitations. Proposed inclusive planning recommendations will be circulated to the working group at least a week prior to the final project meeting and all written comments from stakeholder organizations will be included in the final report. If there is not consensus on specific recommendations, the report should clearly explain which organizations supported or disagreed and the basis for their different positions.

How will working group members continue to work together following completion of the grant process?

The working group will continue to work with the county Grants Administrator and the HATS Supervisor to develop a proposal for the next round of Transit Planning for All grants. If the county succeeds in securing another inclusive planning grant, the working group will continue to work with the project team to guide the grant process. If the county's grant application is not successful, the working group will meet to discuss whether it should continue to play a role in helping stakeholders implement the next steps identified through the 2013 inclusive planning grant.

1.2 Recommended Activities

Through extensive inclusive planning and research, the project team prioritized activities in four areas to improve transportation options in the Helena area. The County has submitted the



Phase 2 grant application for these four action areas. If this grant is awarded, lead community members will take strong action on all four areas. If not awarded, HTAC is committed to securing resources for and helping to implement the HTAC portion of the list.

Achieving success will require active engagement and strong leadership from people with mobility limitations and the organizations that represent or serve them. Stakeholder organizations will need to collaborate closely with HATS and one another. These HTP activities directly relate to recommended objectives and activities in the TDP, as referenced in the third column. See Appendix B for a summary of the TDP.

Table 1-1: Objectives and Actions from the Inclusive Planning Project

#	Action	Related TDP Objectives	Lead
Objective 1	Strengthen the role of the Helena Transportation Advisory Council (HTAC) for coordination and mobility management activities – HTAC’s charge from Montana Department of Transportation is to coordinate. Better training and a one-year action plan could help the TAC build coordination and have a stronger voice.	Objectives 4, 5	HTAC
Action 1.1	Recruit a mobility manager to identify and implement coordination strategies. This could be funded through the city, county, or a local non-profit. This person(s) could work with human service agencies to negotiate contracts and resource sharing agreements; tap into additional financial and in-kind resource opportunities; and take the lead on implementing inclusive planning best practices.	Objectives 4, 5	HTAC
Action 1.2	Conduct a self-assessment and develop a one-year action plan to identify high priority coordination opportunities. HTAC could use available tools such as the <i>Montana Coordinated Transportation Handbook</i> (Montana Council of Developmental Disabilities) ² , and the <i>Human Service Transportation Coordination Framework for Action</i> (National Resource Center NRC) community self-assessment tool ³ .	Objective 4	HTAC
Action 1.3	Update the transportation inventory to document all community resources. One reference is the <i>Montana Coordinated Transportation Handbook</i> .	Objective 4	HTAC

² For more information see <http://mtcdd.org/toolkits-guides/coordinated-transportation-handbook/>
³ For more information see <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=1388>

#	Action	Related TDP Objectives	Lead
Action 1.4	Organize a HTAC workshop to learn about successful coordination models . Potentially invite a representative from another community to give an in-person or webinar presentation to HTAC. For example, communities in Oregon and Washington offer highly successful models of well-coordinated networks of human service-public transportation providers, including a one stop contact point to reserve a ride.	Objective 4	HTAC
Action 1.5	Lead the expansion of travel training programs with partner organizations. Several organizations currently provide travel training to their constituencies. These programs can be expanded to more people with mobility limitations. Travel training programs would need to be developed in partnership between HATS and human service organizations that understand the needs of specific populations. Leadership could come from the HTAC and/or human service organizations.	Objective 4	HTAC
Action 1.6	Pursue new opportunities for improving cost efficiency and generating revenue that will achieve incremental funding increases over time, (e.g. contracts for service , the state government, the Veteran’s Administration, capital area parking meters, and other sources) for a Capital-west side-Fort Harrison route; longer hours; Saturday service.	Objective 5	HTAC
Action 1.7	Pursue funding from the county for North Valley and improved East Helena deviated fixed route service.	Objective 5	HTAC
Action 1.8	Work with Advocacy Coalition to inform larger policy and funding decisions (see 3.3 and 3.4). Also work with the Intergovernmental Transit Committee on these efforts.	Objectives 4, 5	HTAC
Objective 2	Form a local Consumer Council – A Consumer Council would engage consumers with mobility limitations to help identify ongoing needs and provide feedback on planning and service policy decisions.	Objectives 4, 5	TBD
Action 2.1	Non-profit organization(s) takes the lead on staffing and convening the council.	Objectives 4, 5	TBD
Objective 3	Form a “Transportation for All” Advocacy Coalition – A formal coalition would actively monitor and engage in city and county planning and policy. It would also be essential for organizing and running a campaign to secure new funding.	Objective 5	TBD
Action 3.1	Find resources through a grant or a local non-profit organization to staff, organize, and facilitate a first coalition strategic planning work session.	Objective 5	TBD
Action 3.2	Stakeholder organization leader(s) takes the lead on finding and funding a coalition coordinator , to help develop and execute a coalition strategic plan including advocacy related priorities. Areas of expertise include coalition building and strategic communications.	Objective 5	TBD



#	Action	Related TDP Objectives	Lead
Action 3.3	Consolidate opinion and choose direction on significant funding expansion. Among the options are millage through an Urban Transportation District, city millage, gas tax, parking meters, significant statewide funding, and/or significant increase of service contracts and local business/non-profit contributions.	Objective 5	TBD
Action 3.4	Develop an action plan for implementing funding concepts. Hear from a community that has recently passed a transit funding initiative (e.g. Missoula UTD). A good national resource is the Center for Transportation Excellence ⁴ .	Objective 5	TBD
Action 3.5	Organize stakeholders to actively participate in the next transportation planning activity, the Greater Helena Transportation Plan.	Objective 5	TBD
Objective 4	Develop a Strategic Marketing Plan – A transit professional who specializes in marketing and who is familiar with industry best practices would be the most qualified person to develop a marketing plan and design updated branding, web page, bus stop signs, schedules, and communications materials. One recommendation is Transit Marketing LLC ⁵ .	Objective 7	HTAC
Action 4.1	TAC assesses willingness of city, county or local non-profit to hire a qualified consultant to develop a marketing plan.	Objective 7	HTAC

⁴ For more information see <http://www.cfte.org/>

⁵ For more information see <http://www.transitmarketing.com>

2 Methodology & Metrics

This chapter presents a summary of the research and outreach activities that were included in the project's scope of work. Additional information about this tasks and activities is included in subsequent chapters and the appendices.

2.1 Inclusive Practices Research

The first two tasks in the scope of work for this project were to research and share with stakeholders successful funding strategies and inclusive practices of transit systems in like sized communities. Research was conducted and findings were shared with stakeholders on an ongoing basis throughout the project. The project team used a variety of methods to research inclusive practices in peer communities.

Transit Planning for All Environmental Scan – Inclusive practices identified in the environmental scan were summarized in a one page factsheet (See Appendix C) and discussed with stakeholders during interviews and meetings. More information can be found on the national project website⁶.

Literature review and web resources – Inclusive practices and funding information were researched through multiple resources listed in Chapter 7 Resources and References.

National Transit Database (NTD) funding data – We analyzed newly released 2012 NTD data (National Transit Database, 2013), selecting 43 peer communities, and produced a summary table that was presented at the two community meetings in November.

Peer survey – We developed a web-based survey instrument using Survey Monkey. The survey included questions about both funding strategies and inclusive practices. A number of open response questions were included to collect qualitative information about success stories and challenges. The survey was emailed to 33 peer transit systems and was also posted on the Partnership for Mobility Management's LinkedIn discussion group. Targeted peer communities included peers identified during the HATS TDP process, transit systems included in the Transit Planning for All Environmental Scan, and the 47 NTD per communities. Follow-up emails were sent to increase the number of responses. Six responses were collected and summarized.

⁶ For more information see <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=3346&z=121>



2.2 Stakeholder and Community Outreach

The project’s scope of work focused largely on providing a variety of opportunities for stakeholder organizations and individual consumers to participate in sharing their transportation needs and suggestions for improving transportation services and implementing ongoing inclusive planning practices. These needs and suggestions are discussed in detail in Chapter 4: Needs Assessment and in Appendix D.

The project team began the project with a contact list of 30 people representing 15 stakeholder organizations, many of whom had little or no prior involvement in transit planning. By the end of the project we built the contact list to nearly 380 stakeholders and consumers, representing over 30 organizations. All of these contacts received at least three touches through email or phone calls. Approximately 110 of these contacts signed in at one or more of the project outreach activities, and we estimate that approximately 100 additional participants did not include their names on event sign-in sheets. These numbers reflect the significant, widespread need for improved transportation services among people with mobility limitations, and a correspondingly large, and previously untapped, desire to be involved in transit planning.

Nearly all outreach activities significantly exceeded grant targets. Stakeholders and consumers were included through three Working Group meetings, 18 in-depth stakeholder interviews, eight small group consumer meetings, and five broader community meetings. It is important to note that the project team had to pass up a number of promising stakeholder and consumer outreach opportunities because of time and funding limitations. Table 2-1 summarizes participation by event. Appendix A includes the project stakeholders who signed into our activities along with the activities where they participated.

Table 2-1: Count of Participation by Event

	Participants with Contact Information	Did Not Sign In	Total Participants
Working Group Members	27	0	27
Stakeholder Interviews	18	13	31
Small Group Meetings	72	108	180
Community Meeting: Roundtable	54	0	54
Community Meeting: County Commission	14	0	14
Video Interview	7	0	7
Participants who are senior and/or with a disability	52	74	126
Project Staff	6	0	6



Figure 2-1: HATS Director Steve Larson speaking at Community Roundtable Event.

Photo by Eliza Wiley, Helena Independent Record.

(Knauber, Improving Helena bus service discussed, 2013)

Stakeholder Working Group Meetings

The project Working Group is a core group of key stakeholders who met three times at the transit system conference room on weekday afternoons prior to monthly Transportation Advisory Committee (TAC) meetings. Working Group members developed the mission statement and rules of procedure. They also provided guidance and feedback on grant activities. Seven stakeholders attended each of the first two working group meetings, and nine participated in the third meeting. Following the third working group meeting, attendance at the TAC meeting was at the highest level in recent memory, with 13 of 20 working group members attending that meeting. Over the course of the project, working group membership grew from 7 to 27 stakeholder organization representatives. Following completion of the planned grant activities, two additional working group meetings were held in late 2013 to discuss and plan next steps.

Stakeholder Interviews

Stakeholder interviews were conducted to assess transportation needs; organizational transportation priorities; tap into stakeholders' knowledge base for general guidance; collect suggestions for inclusive planning and improved transportation services; and explore interest in engaging in additional inclusive planning activities such as forming a coalition of stakeholder organizations. The project team built a contact list of community group leaders representing seniors, people with disabilities and others with knowledge of transportation issues in Helena. From this list, 29 group leaders were contacted to identify 10 priority interview subjects. The list grew significantly as participants recommended interviewing additional community leaders.

Due to the project's time and funding constraints the project team was unable to interview a number of important stakeholders. If possible, we recommend interviewing these additional

stakeholders as part of future inclusive planning efforts. Stakeholder interviews were conducted to assess the transportation needs of people with mobility limitations; assess organizational transportation priorities; tap into stakeholders’ knowledge base for general guidance; collect suggestions for inclusive planning and improved transportation services; and explore interest in engaging in additional inclusive planning activities such as forming a coalition of stakeholder organizations to assist with implementing inclusive planning and improved services.

The team organized and conducted a total of 18 in-depth interviews with group leaders from the senior and disability communities. All of the interviews were conducted face-to-face and generally lasted close to one hour. In total 31 people participated. The interviews included 11 one-on-one interviews, five two-on-one interviews, and two small group interviews.

Important outcomes from the stakeholder interviews included:

- Nearly all stakeholders contacted requested continued communication about grant activities;
- 16 of 18 stakeholder organizations interviewed offered suggestions for additional large group, small group or one on one consumer meetings, only 7 of which were held during the course of this grant project;
- 18 of 18 stakeholder organizations expressed an interest in participation in the community roundtable;
- 18 of 18 stakeholder organizations wanted to receive ongoing communication about upcoming planning opportunities;
- 18 of 18 stakeholder organizations felt that a “policy and funding” focused transportation coalition is needed;
- 8 of 18 stakeholder organizations offered demographic data about their clients or members;
- Numerous suggestions were offered for additional one-on-one interviews with organizational leaders;
- Additional organizational leaders expressed interest in providing Letters of Support for grant opportunities, as well as a renewed commitment to the HATS TAC.

Table 2-2: Stakeholder Interviews

Stakeholder Interview Participants	
Charlie Briggs	Easter Seals-Montana, Idaho, Wyoming and Utah
Wendy Cook and Nancy Pierce	St. Peter's Hospital
Vivian Crabtree	Montana Association for the Blind / HATS Transit Advisory Committee (TAC)
Shawna Donaldson	Rocky Mountain Development Council (RMDC)
Walter Hanley	RMDC Home Delivered Meals / HATS TAC
Kelly Goodwin-McBride, Erin McMahon, and Kate McCombs	YWCA

Stakeholder Interview Participants	
April Gregg	Our Place
Brian Johnson	United Way of the Lewis and Clark Area
Suandra Lowry	Area IV Agency on Aging
Bob Maffit	Montana Independent Living Project
Michael Mahoney	Family Outreach
Greg Olsen	Helena Industries and the Helena Non-Motorized Travel Advisory Council
Susan Pesta	WestMont
Melanie Reynolds and key staff	Lewis and Clark City-County Health Department
Karlee Smith	Association of Retired Persons-Montana
Deborah Swingley	Montana Council of Developmental Disabilities
Roger Trumper	Veterans Administration
Ann Waickman	Helena Food Share

Group Meetings with Consumers

The grant scope called for five meetings with consumers with a total of 100 individuals participating. The project team and Working Group identified 14 meeting opportunities of which they prioritized eight. Team members worked with stakeholder group representatives to finalize meeting dates, times, and the preferred format for each meeting. In total, over 170 consumers and organizational support staff attended these meetings. The group meeting format allowed people with mobility limitations to engage at an intimate level and identify needs and suggestions.

Table 2-3: Consumer Meetings

Meeting Host/Location	Meeting Type	Participants
WestMont at WestMont facility conference room – non-profit that provides services for people with developmental disabilities.	One hour small group roundtable	7 Total: Four clients, three caregivers, and Susan Pesta, Vice President, Client and Agency Relations.
MT Council on Developmental Disabilities (MTCDD) Consumer Council – people with cognitive disabilities	Project team members gave a short project presentation, which was followed by questions and answers and many one-on-one conversations at a meeting of Consumer Council members from around the state.	24 Total: 8 with cognitive disabilities, 7 parent advocates, 9 professionals who serve people with disabilities, 10 from Helena and 13 from other parts of Montana
PEERS Social Club at First Lutheran Church – people with cognitive disabilities	Project team members gave a short presentation, then held one-on-one discussions over approximately 1.5 hours with four consumers and two caregivers.	65 Total: 50 with developmental disabilities and 15 caregivers



Meeting Host/Location	Meeting Type	Participants
East Helena Dinner Club at the East Helena Fire House – senior citizens	A short project introduction during lunch, followed by discussions with participants after lunch	15 Total: Senior Citizens
MT Association for the Blind-Helena Chapter at Touchmark Retirement Community	Standard large group meeting format with a presentation by project team members followed by discussion.	24 Total: 20 participants were either seniors and/or disabled 4 Veterans Administration employees
Montana Independent Living Project (MILP) at the AARP Conference Room – people with physical disabilities	Standard large group meeting format with a project introduction followed by discussion.	12 Total: Both seniors and people with disabilities
Our Place Drop in Center – people with mental illness and/or substance abuse disorders	Small group round table discussion	Approximately 12 Total People with mental illness disabilities
Helena Resource Alliance – Staff of human service organizations with United Way-funded and/or fiscally sponsored programs	1.5 hour standard meeting format with presentation followed by discussion.	13 Total: 4 were either senior and/or disabled 10 stakeholder organizations represented

Community Meetings

In addition to the two community meetings originally planned in the grant scope, the project team also took advantage of important opportunities for three additional wrap-up meetings with broad-based groups of key stakeholders. In total approximately 130 people participated in these five meetings. The following table and text describes the community meetings.

Table 2-4: Community Meetings

Community Meeting	Meeting Type	Participants
Inclusive Planning Community Roundtable – A broad range of stakeholders including many who had participated in earlier grant activities	Project summary presentation, panel discussion by leading stakeholders, group discussion of priorities and next steps.	55 Total: 15 seniors and/or disabled
Board of County Commissioners	Project summary presentation, followed by public comments, and questions and discussion by commissioners	22 Total: 10 seniors and/or disabled

Community Meeting	Meeting Type	Participants
Lewis and Clark County Joining Community Forces (JCF) Initiative – An initiative to help veterans and their family members readjust to civilian life.	Short project introduction followed by discussion	25 Total: Organizational leaders including staff from the offices of Senator John Tester, and Congressman Steve Daines. Number of seniors and people with disabilities unknown.
City of Helena “Non-Motorized TAC” – Committee recently formed to address bicycle and pedestrian issues, such as gaps in sidewalk system.	Short project introduction followed by small group discussion	15 Total: Number of seniors and people with disabilities unknown.
Helena Area Transportation Coordinating Committee (TCC) – Staff of transportation related government agencies and stakeholder organizations	A short project presentation, followed by discussion.	12 Total: Number of seniors and people with disabilities unknown.

Community Roundtable Event

Fifty-five consumers and representatives of stakeholder organizations attended the roundtable event, including two County Commissioners and one City Commissioner. The event included a presentation of project findings and a video the project team created of consumers with mobility limitations telling their personal stories about the importance of transit, followed by 1.5 hours of in-depth discussion of needs, suggestions and next steps. At this meeting participants helped prioritize project action areas and next steps, and a number of key stakeholders made commitments to play roles in important action steps moving forward.

Event outcome highlights included:

- 16 organizational leaders and individuals returned packet “checklist” indicating action areas that they think should be community priorities;
- 7 organizational and community leaders signed up to help with coalition start up activities with one offering financial resources and a match challenge idea;
- organizational leaders indicated a renewed commitment to HATS Transit Advisory Committee efforts;
- transit system users expressed an interest in participating in a Consumer Council;
- County commissioners offered to commit staff time to grant writing and recruitment of key private sector entities like Carroll College;
- One organization committed staff time to communication of upcoming planning opportunities; and,
- The Army National Guard community liaison invited a project team member to participate in the Lewis and Clark County Joining Community Forces (JCF) Initiative, as transportation services fall under one of the key “pillars” of success for that initiative.



This effort is being spearheaded by the Army National Guard and key community leaders to help veteran’s and their family members relocating and/or newly locating to Lewis and Clark County in the coming years, to readjust to civilian life.

Another outcome of the event was positive media coverage. Reporters from the Helena Independent Record and KTVH attended and reported on the event (Knauber, Improving Helena bus service discussed, 2013). Helena Civic TV filmed the entire event and aired it at list six times in the community.



Figure 2-2: Community Roundtable Event at St. Peter’s Hospital.
Photo by Eliza Wiley, Helena Independent Record.
(Knauber, Improving Helena bus service discussed, 2013)

Board of County Commissioners Meeting

County Commissioners heard a presentation of project outcomes as well as public testimony regarding the impact of transit in the Helena community. The event included testimony from Health Department, 3 organizational leaders and 6 consumers who are people with disabilities, as well as positive coverage by the Helena Independent Record (Knauber, County seeks funds for bus service study, 2013).

Additional outreach activities

Stakeholder Data Collection

Several key stakeholder organizations provided membership or client data giving a general picture of where people with mobility limitations live in the county. Mapping will need to be completed in Phase 2 due to limited resources during this phase.

Consumer storytelling video

Matthew Cramer, Americorp VISTA volunteer at Helena's SAVE Foundation, recruited and videotaped consumer volunteers. He combined the footage into a short video that captures the voices of transit users expressing the value of current transit services, along with their needs, their insights and vision for a more inclusive and flourishing transit system for the Helena area and Lewis & Clark County.



Figure 2-3:

Panelists at the Community Roundtable event watch a video produced by the project team documenting the stories of consumers' transportation needs.

*Photo by Eliza Wiley, Helena Independent Record
(Knauber, Improving Helena bus service discussed, 2013)*

3 Public Participation in Planning

Inclusive planning for people with mobility limitations depends extensively on good public participation practices. Project research identified the International Association of Public Participation Spectrum of Participation shown in Figure 3-1 below.

The consultant team asked Helena area stakeholders and consumers to rate public participation on this spectrum. Most stakeholders and consumers said they felt that the level of inclusiveness currently being achieved is generally at the “inform” level. Best practice in public participation usually targets the “collaborate” level.

- **Inform:** To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions
- **Consult:** To obtain public feedback on analysis, alternatives and/or decisions.
- **Involve:** To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.
- **Collaborate:** To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.
- **Empower:** To place final decision-making in the hands of the public.

Upcoming opportunities for improved public participation include the Helena Area Transportation Plan, and implementation of the new five-year Transit Development Plan action steps.





International Association
for Public Participation

IAP2 Spectrum of Public Participation

Increasing Level of Public Impact

Public participation goal

Inform

To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.

Consult

To obtain public feedback on analysis, alternatives and/or decisions.

Involve

To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.

Collaborate

To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.

Empower

To place final decision-making in the hands of the public.

Promise to the public

We will keep you informed.

We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.

We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.

We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.

We will implement what you decide.

Example techniques

- Fact sheets
- Web sites
- Open houses

- Public comment
- Focus groups
- Surveys
- Public meetings

- Workshops
- Deliberative polling

- Citizen advisory committees
- Consensus-building
- Participatory decision-making

- Citizen juries
- Ballots
- Delegated decision

4 Needs Assessment

In 2013 two major transit planning projects – the Transportation Development Plan (TDP) Update and the Helena Area Inclusive Transit Planning (HITP) Grant – provided an in-depth assessment of transportation needs in the Helena area. The TDP assessed needs through public outreach (Chapter 7 and Appendix B of the TDP), system analysis (Chapter 3), and demographic analysis (Chapter 2). The HITP project assessed needs through interviews, small group meetings, and community meetings. A summary of findings is presented here. Appendix D provides a detailed summary of stakeholder and consumer input from the HITP project, including a large number of quotes and comments.

It is important to note that both projects identified public transportation funding as a critical overarching issue – specifically, the need to increase revenues and improve funding diversity and sustainability. Because of the scope and complexity of the funding issues, they are not included in this chapter. Instead, Chapter 5 is focused entirely on providing an in-depth discussion of funding options, challenges and opportunities.

4.1 Challenges Identified in TDP

Moving forward, HATS greatest challenge will be balancing the costs and benefits of Curb-to-Curb with fixed route services. Most of HATS’ current challenges stem from a heavy investment in Curb-to-Curb service that costs far more per ride than fixed route service. HATS’ total cost of providing Curb-to-Curb service is further increased by current policies that make this service available to people who are able to use fixed route service.

Low Level of Use by Choice Riders

The results of the TDP rider survey showed that 92% of current riders do not own a car and/or cannot drive. This low level of use by commuters and other “choice riders” is a reflection of the lack of convenient fixed route service, poor on-time performance, long travel times and limited marketing.

Automobile Access

What is your primary reason for using HATS?

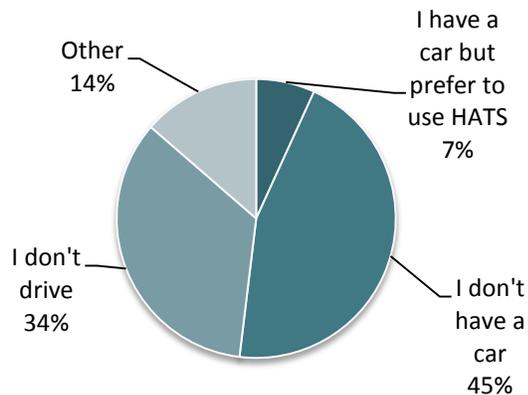


Figure 4-1: HATS riders’ access to automobiles



Lack of Funding Diversity

The lack of diversity in HATS local funding is a significant challenge. The City of Helena is by far the largest local contributor. Contributions from the City of East Helena, Lewis & Clark County, and human service agencies total less than the cost of the local portion of the East Valley route. In Montana, it is particularly important for public transportation providers to have a robust and diverse local funding base because Montana lacks a state-

level funding source. In comparison, dedicated local funding and state-level funding in many other states significantly enhances the stability and capacity of many transit providers. Many top performing rural systems have much larger budgets than shown in the peer group we selected.

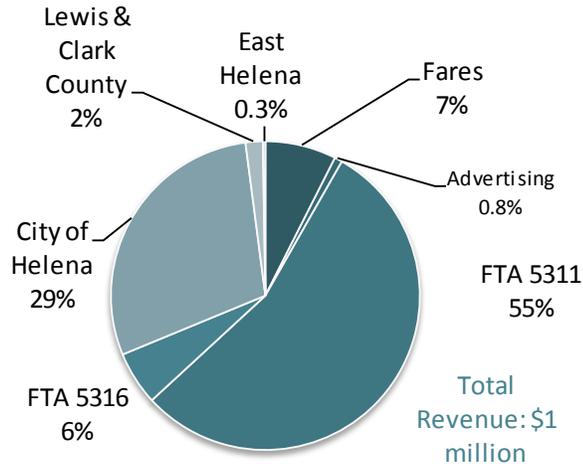
In many cases these larger budgets are due in part to local taxing authority dedicated to public transit, as well as state funding.

High Cost per Ride and Low Rides per Hour

As shown in the accompanying graphs and tables, HATS' budget is adequate to provide services comparable to Bozeman and Butte. However, compared to peers, HATS is providing a much smaller percent of its service miles with fixed or flex routes – 64% of HATS rides are on the high-cost Curb-to-Curb service. As a result, HATS is providing half as many rides per hour as Bozeman and significantly fewer than Butte.

Operations Funding for HATS Weekday Service*

Fiscal Year 2012



*Checkpoint, Curb-to-Curb, East Valley

Figure 4-2

Table 4-1: Cost of HATS services in FY 2012

Core Service	Cost per Ride	% Hours
Helena Checkpoint	\$6.29	21%
Helena Curb-to-Curb	\$18.28	64%
East Valley Bus:	\$9.08	15%
Overall	\$11.41	100%

On-Time Performance

HATS fixed route and deviated route services perform poorly⁷ in the area of on-time performance. The widely-used level of service (LOS) rating scale used here applies to communities of all sizes. Typically, the highest LOS ratings are only achieved by large urban areas with significant transit funding resources. Based on peer comparisons, the consulting team believes LOS D is a reasonable minimum target for HATS.

- Target Level of Service (LOS D): 80-85% on-time performance
- Actual LOS F: 49% on-time performance for Checkpoint, and 35% on-time performance for East Valley

On Time Performance (October 2012 Sample)

Buses should run at least 80% on time, never early

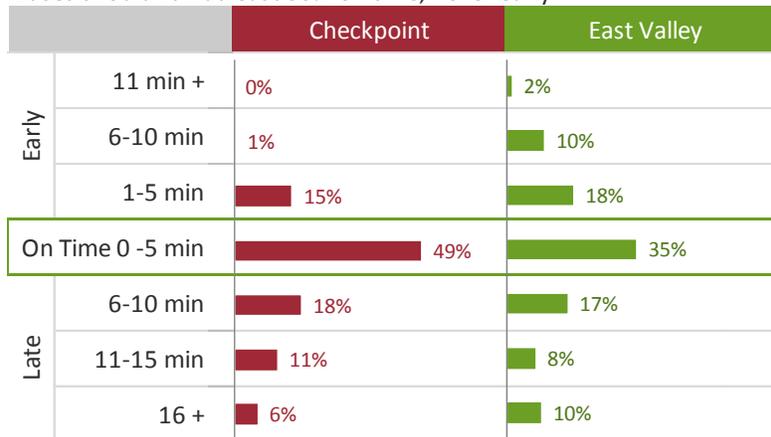


Figure 4-3: HATS on time performance

HATS is failing to meet this target largely because the Checkpoint and East Valley routes are trying to accomplish too much with unrealistic schedules – attempting to cover too large an area with too many stops. The East Valley Bus, with its expansive service area, performs far worse than the in-town Checkpoint route. A related issue is that many riders surveyed indicated that travel times on the fixed route bus are too long to meet their needs.

Limited availability

LOS D is also a reasonable minimum target for HATS’ service availability. Fixed route service should be provided within one-quarter of a mile of 60-69% of the service area population.

⁷ Based on levels of service published in the Transit Capacity and Quality of Service Manual (Kittelson & Associates et.al., 2003)



Currently however, the Checkpoint and East Valley buses operate within a quarter-mile of only 28% of the City of Helena’s population and there is no service on the west side.

Similarly, the goal for hours of service should be 12 to 13 hours of daily weekday service with some weekend service. Currently the Checkpoint route operates for 11 hours and the East Valley route operates for 8 hours, with no weekend service.

Table 4-2: HATS level of service availability

No west side service
<ul style="list-style-type: none"> Target LOS D: 60-69% of population served Actual LOS F: 28% of City of Helena population within ¼ mile of a Checkpoint or East Valley bus stop
Limited hours of service
<ul style="list-style-type: none"> Target LOS D: 12-13 hours of service Actual LOS E: 11 hours for Checkpoint and 8 hours for East Valley No weekend service

Marketing and Bus Stops

The responses to the TDP community survey showed that among non-riders, 66% said they were “unfamiliar with HATS and how to use it” compared to 23% of riders. More significantly, large percentages of both riders (46%) and non-riders (72%) said they “need more information on the service”, and both groups responded even more strongly that “more information about existing services” would be an important factor in influencing them to use HATS more – 62% of riders and 79% of non-riders agreed with this statement and in both cases large percentages strongly agreed.

This is a common weakness of small systems in communities such as Helena. We have seen many bus systems fall far short of their potential because they fail to effectively market their services and provide information to make their systems easy for the public to use. There are many tools HATS could use to address this need, including an improved website and hard copy informational materials, as well as installing bus stop infrastructure.

Creating bus stops is a significant improvement HATS could implement to make the system easier to use and to increase visibility. HATS currently has almost no bus stop infrastructure. Developing and implementing a plan for fixed route bus stop improvements should be a high priority over the next five years. Improvements such a signs, shelters, benches and lighting have high marketing value and are also very important for making the system convenient, comfortable and safe to use.

Opportunity to evolve into a community service

HATS has a great opportunity to evolve into a broader community service while maintaining the important safety net services it is currently providing. Developing services that offer viable transportation options for choice riders will make HATS a more integral and valuable component of the Helena area's economy and quality of life. Our public outreach showed that there is stakeholder and community support for making this transition. Whatever changes HATS makes, management must ensure that bus service is safe, clean, effective, and reliable.

4.2 HITP Stakeholders Reinforce TDP Findings

Consistently, throughout all HITP outreach activities, stakeholders and consumers reinforced the findings of the TDP, identifying significant needs for improved transportation services. In the Helena area, many people with mobility limitations lack adequate transportation to access basic needs such as employment, shopping, childcare, medical services, and education. They also need improved transportation options for independence, quality of life and community involvement, including access to social and faith based activities, recreation and community events such as local government public meetings.

All stakeholder group leaders interviewed identified transportation as a priority for their organizations. Additionally, many identified the rapidly growing senior population as a constituency that will require expanded services in coming years, as reflected in one stakeholder comment:

"Transit is important to all our member organizations and crosses all our issue areas. For a capital city with many human services it is a problem that there is not enough transit service in the city and none in the county."

Most said HATS' Curb-to-Curb service is more heavily used and more important than HATS' Checkpoint route for their members/clients. Checkpoint's poor on-time performance, long travel times and limited service coverage are all reasons for this current situation. Many also commented that transportation services are most needed from October through May due to icy conditions that impede biking and walking and are a barrier for some senior citizens who are not comfortable driving unless the roads are dry.

Employment

Stakeholders and consumers provided stories and statistics documenting the critical link between transportation services and employment for people with mobility limitations. Many commented that people with mobility limitations often have jobs after 5:00 pm and on weekends. Because no service is currently available at those times, it is not uncommon for people to refuse jobs due to lack of transportation. A typical consumer comment was, "For a



person with a mobility limitation to get a job, it must be on the bus line.” Following are several of the best examples offered by participants:

- God’s Love requires clients to get jobs and approximately 80 percent of their clients ride HATS. However, many clients have had to refuse jobs because the bus didn’t run late enough. A typical example is having no transportation home from Walmart in the evening.
- Approximately 70 percent of YMCA residents use HATS. They would love to see the system expanded because many YMCA clients have to combine transit with extensive walking to access jobs. One person has an additional 30 minute walk to work at Costco.
- VA officials at Fort Harrison reported that the lack of transportation options limits their ability to hire veterans with disabilities, or to use volunteers with mobility limitations.

We also collected evidence of the potential value of transit for commuters who are choice riders. One participant who drives stated, “I would use HATS to access the Capital Complex to avoid the hassles of parking and wintry conditions.”

Essential Services

Many participants use HATS to access essential services. These consumers include a cancer patient who has depended on HATS for six years since being diagnosed. Another rider lives at Leisure Village (East Valley), and depends on the bus because he does not have a driver’s license. However HATS only has one stop at 1 pm, making it difficult to keep appointments.

Independence and quality of life

Overwhelmingly, people with mobility limitations who participated in the project cited the importance of transportation for their independence, ability to be involved in the community, and overall quality of life. One participant shared the story of their grandmother who “used Curb-to-Curb and wouldn’t have been able to live independently without the service.” Typical comments included not being able to go to church on Sundays, and a senior citizen who is blind who stated, “I am on lockdown in the evenings and on weekends.” Another participant who does not drive said he used to ride the Curb-to-Curb out to the North Valley to visit friends. He would like to see this service return because some of his friends in the North Valley are home bound.

4.3 Improved Customer Service

Consumers and stakeholders who participated in the HITP and TDP said it was difficult to find easy-to-understand, up-to-date information about transit services. They also emphasized the need for staff to be better trained in working with people with disabilities.

Opportunities to address these issues start with a marketing plan to improve customer information through website improvements as well as hard copy materials such as brochures, schedules, and bus stop signs; staff training using resources such as those developed by Easter Seals; and implementing appropriate technology for managing demand response service.

4.4 Appropriate Staffing

To successfully implement the recommendations in Section 1.2 above, several leadership roles need to be filled. Overarching goals of these jobs are to both provide specialized technical assistance while also building the expertise and skills of existing HATS staff, TAC members and the staff and leaders of key partner stakeholder organizations.

Communities around the nation that have successful transit systems typically have organizational structures with clearly defined job responsibilities, along with adequate time, resources and authority to achieve the desired goals. The people who are hired for key roles have strong professional qualifications for the needed skill sets.

4.5 Non-Motorized Transportation

Walking and biking information for current HATS riders was collected through the TDP rider survey and stakeholder involvement in the HTP. It is summarized in Section 7.2 of the TDP. Stakeholders indicated that safe pedestrian access to bus stops is a high priority because the majority of riders walk to access the bus. A much smaller percentage ride bikes to access the bus. The quality of pedestrian and bicycle infrastructure varies greatly throughout the community. There are many opportunities to improve this infrastructure and coordinate these improvements with the installation of bus stop infrastructure.

The 2011 Growth Policy (City of Helena, 2011) includes a good summary of pedestrian and bicycle issues. A large number of public comments received during the Growth Policy development process indicated a strong need for better pedestrian connectivity throughout the city, ‘complete streets’, and elimination of major pedestrian barriers. The need to create a more pedestrian-friendly environment (with amenities, traffic calming, and safer intersections) also has been extensively noted by the public. The input indicated the need to install more sidewalks, incorporating accessible design, maintenance of existing infrastructure and seasonal maintenance to ensure that all facilities are useable throughout the year. This maintenance is especially important for mobility for the elderly and persons with a disability. The City has utilized traffic calming devices such as traffic circles, bulb-outs, and speed dips on local streets to reduce motor vehicle traffic speeds and traffic cutting through neighborhoods. In addition, Helena’s network of pedestrian/bicycle paths has been expanded significantly in the past ten years.

4.6 Coordination and mobility management

Improved coordination and mobility management would help the stakeholders collaborate effectively to address all the needs discussed in this chapter. Because of its overarching importance, mobility management was identified as a top priority in HTP Round 1.

Providing a coordinated, efficient transportation system requires great expertise in navigating through the complicated network of federal transportation funding sources and regulations, and

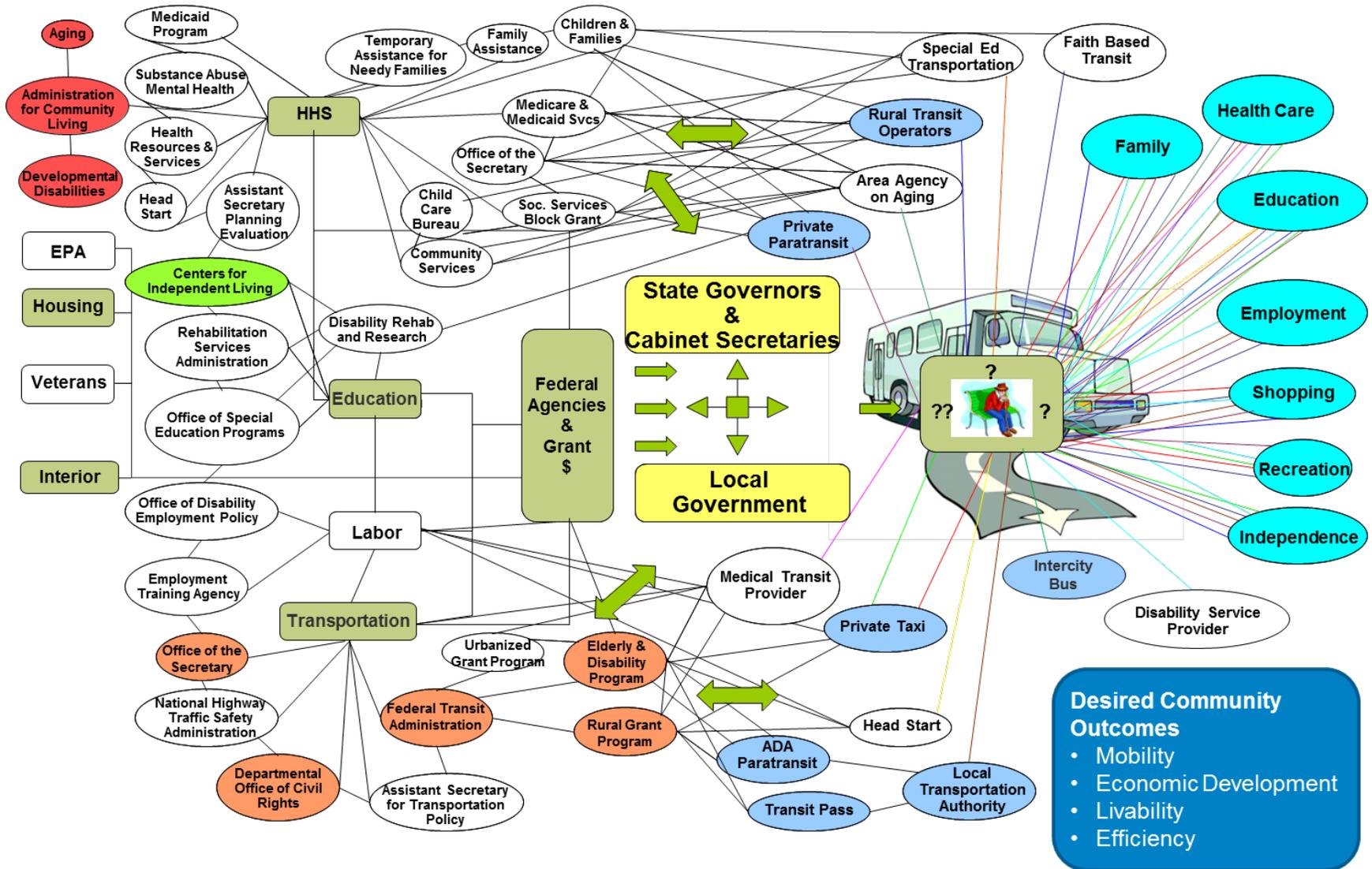


applying this understanding to the web of community partners and needs. In 2004 the Congressional Office of Management and Budget identified 62 federal programs that have transportation funding programs for the human service portion of community transportation. The spaghetti diagram in Figure 4-3 below shows these programs, updated to include livability programs and other program changes. Layered onto the federal funding sources are the state and local governments, the transportation providers, and the supporting social services.

While this great range of human service programs offers a variety of opportunities to provide transportation options for people with mobility limitations, the person looking for a ride and the organizations offering rides can get lost in the complexity of navigating this network of often overlapping programs. In communities with poor coordination and a lack of expertise and the staffing resources to tackle this challenge, the result is typically low funding levels and missed opportunities, with duplicated transportation services in some areas and no service and limited hours in other areas.

Stakeholders felt that while some good communication has taken place, little substantive collaboration has yet been achieved – so far stakeholders have been talking but not doing. A mobility management approach to coordination offers the best opportunity to leverage existing resources and to improve and expand transportation options. Mobility management is strongly customer focused and includes the following components:

- Qualified, professional mobility management staff coordinate public transportation and human service transportation.
- Technology is implemented to help improve efficiency, communication and transit management capability. Technology must be carefully planned and tailored to meet a community's specific needs.
- Transportation services are easy and enjoyable to use because they are convenient and because effective marketing ensures that it is easy for customers to find high quality, up-to-date information about transportation options.
- Creative, broad-based funding strategies are developed, including public-private partnerships, and strong community support and local funding that leverages federal and state funding.
- Mobility managers and transit stakeholders are engaged in local and regional planning efforts to ensure sustainable, transit oriented community design and growth patterns, as well as implementation of transportation demand management strategies.



Adapted from United We Ride

Figure 4-4: A complex network of federal funding sources.

5 Funding

Throughout this project, stakeholders identified improved funding as a high priority need. Specifically, in order to meet the transportation needs identified in the Helena area, it will be necessary to increase funding diversity, sustainability, and overall funding levels for transportation services.

A variety of potential funding sources could help improve and expand transportation services. While some could be developed in the short term, others would require longer term strategies. Potential short term sources include contracts for services with human service agencies; investments from partners such as large employers, downtown businesses and Carroll College; and contributions from local government. If stakeholders collaborate to build a funding advocacy campaign, within five years it could be possible to achieve an urban transit district (UTD) mil levy and/or other tax or fee-based dedicated funding that could replace and expand local government general fund contributions. A bigger challenge would be helping to build a statewide collaborative effort to secure a state level funding source such as exists in most other states.

5.1 Peer communities funding comparison

This project used the Rural National Transit Database (National Transit Database, 2013) to compare HATS funding with funding data from 43 peer communities. We used NTD data for Reporting Year 2012, filtering it for micropolitan communities with at least 4 of a list of 7 characteristics in common with Helena: county population, core city population, community educational levels, budget, passengers per hour, passengers per mile, or state capital. We filtered out communities of similar size with budgets greater than \$8 million, as these are predominantly communities with unique characteristics that do not provide a good comparison – ski towns, national park gateway communities, and communities with major universities. While the 2012 data is cleaner than previous years' Rural NTD data, it is important to note that this is a young database and there is significant subjectivity and inconsistency in how different communities categorize funding sources. Some important examples of these issues are noted in the text below, following Table 5-1.

As shown in Figure 5-1 and Table 5-1 below, our peer analysis showed that:

- **Larger Budgets** – On average, the peer communities had a budget of \$2 million compared to \$1.2 million for Helena.
- **Diverse Funding** – Most peer communities have more diverse funding sources than Helena.
- **Farebox** – On average, peer communities' farebox revenue makes up 9% of total revenue, which is in line with Helena's revenue stream.



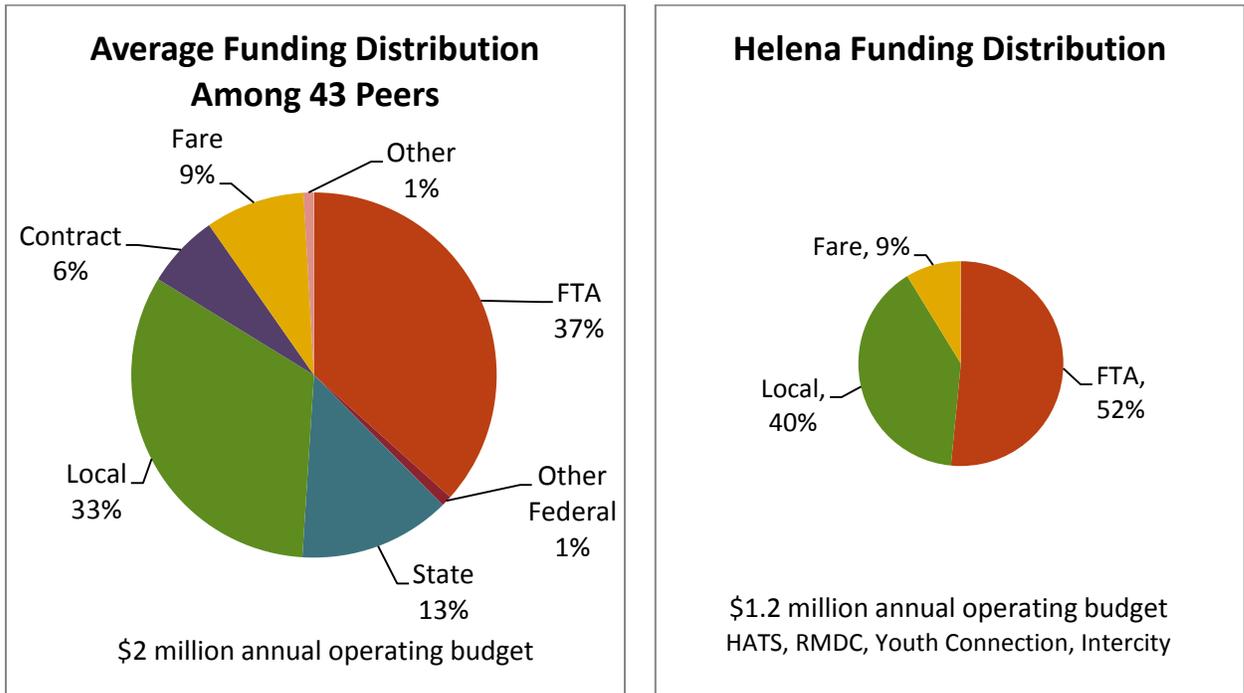


Figure 5-1: Peer community budgets are larger and more diverse than Helena

Table 5-1: Funding in similar communities
Per National Transit Database Reporting Year 2012

SUB-RECIPIENT NAME	STATE	Spent on Operating - Total Annual Expenses	% FTA	% Other Federal	% State	% Local	% Contract	% Fare	% Other
Clallam Transit System	WA	\$7,377,844	6%	0%	0%	78%	0%	14%	0%
New Castle Area Transit Authority	PA	\$7,026,719	36%	0%	48%	2%	0%	11%	3%
Marble Valley Regional Transit District	VT	\$5,340,712	46%	17%	18%	15%	0%	3%	0%
City and Borough of Juneau	AK	\$5,198,075	15%	0%	2%	63%	0%	15%	3%
Mendocino Transit Authority	CA	\$3,753,881	11%	2%	9%	60%	2%	14%	2%
Advance Transit, Inc. NH	VT	\$3,711,529	60%	3%	2%	10%	0%	0%	24%
Chillicothe Transit System	OH	\$2,830,254	38%	0%	6%	14%	40%	2%	0%
Humboldt Transit Authority	CA	\$2,526,068	10%	0%	0%	49%	0%	41%	0%
Central West Virginia Transit Authority	WV	\$2,278,168	22%	0%	0%	71%	0%	6%	0%
Incorporated County of Los Alamos	NM	\$2,220,045	52%	0%	0%	48%	0%	0%	0%
City of Manitowoc	WI	\$2,086,126	44%	0%	21%	26%	0%	9%	0%
Basin Transit Service	OR	\$2,073,843	19%	0%	15%	54%	0%	12%	0%
Twin Transit	WA	\$1,908,331	6%	0%	11%	76%	0%	7%	0%
City of Durango	CO	\$1,781,636	52%	0%	0%	34%	7%	8%	0%
Fairmont Marion County Transit	WV	\$1,775,591	27%	0%	0%	63%	2%	8%	0%

Table 5-1: Funding in similar communities
Per National Transit Database Reporting Year 2012

SUB-RECIPIENT NAME	STATE	Spent on Operating - Total Annual Expenses	% FTA	% Other Federal	% State	% Local	% Contract	% Fare	% Other
Authority									
OCCK, Inc.	KS	\$1,715,432	47%	0%	14%	29%	0%	9%	0%
Ketchikan Gateway Borough	AK	\$1,678,416	53%	0%	0%	34%	0%	12%	0%
Douglas County	OR	\$1,552,053	41%	0%	11%	30%	1%	18%	0%
Crawford Area Transportation Authority	PA	\$1,524,927	18%	0%	31%	2%	36%	13%	0%
Human Resource Development Council (Bozeman)	MT	\$1,482,177	58%	0%	4%	36%	0%	1%	0%
City of Stevens Point	WI	\$1,392,709	46%	0%	21%	28%	0%	6%	0%
City of Galesburg	IL	\$1,319,227	23%	0%	65%	7%	0%	4%	0%
First Transit-Cortland	NY	\$1,280,594	16%	0%	33%	4%	33%	13%	0%
City of Roswell	NM	\$1,265,034	53%	0%	0%	40%	0%	7%	0%
First Transit - Clinton	NY	\$1,262,175	12%	0%	62%	2%	15%	10%	0%
Rose View Transit & Paratransit System	IN	\$1,242,970	42%	0%	29%	12%	0%	17%	0%
Frankfort Transit System	KY	\$1,242,551	49%	0%	0%	48%	0%	3%	0%
City of Helena - Helena Area Transit Service	MT	\$1,228,670	52%	0%	0%	40%	0%	9%	0%
Northwestern CT Transit District	CT	\$1,202,621	55%	0%	24%	9%	6%	5%	0%
City of Oxford	MS	\$1,193,113	52%	0%	0%	42%	4%	2%	0%
Bluefield Area Transit	WV	\$1,141,240	39%	0%	16%	22%	3%	20%	0%
MARION TRANSPORTATION SYSTEM	IN	\$1,096,275	50%	0%	25%	25%	0%	0%	0%
Butte Silver Bow Transit	MT	\$1,043,950	55%	0%	0%	41%	0%	4%	0%
Belknap-Merrimack CAP/Concord Area Transit	NH	\$939,510	63%	0%	0%	23%	2%	12%	0%
Flathead Area IX Agency on Aging (Kalispell)	MT	\$926,895	55%	7%	0%	33%	0%	6%	0%
City of Eureka dba Eureka Transit Service	CA	\$888,753	19%	0%	0%	0%	81%	0%	0%
VNA Home Healthcare, Hospice & Community Service	NH	\$666,480	39%	8%	0%	32%	17%	3%	2%
Watertown Citibus	NY	\$408,820	9%	0%	44%	41%	0%	6%	0%
Average		\$2,094,300	37%	1%	13%	33%	7%	9%	1%

The following notes highlight some of the variability included in these statistics as well as the types of funding that may be included in different categories:

- **Contracts** – California systems include contracts in fares in order to meet state funding requirements for minimum farebox recovery rates. In contrast, Bozeman includes contracts in local funding in order to maximize local match dollars to leverage federal



- funding. In many communities, non-FTA federal funds are a significant funding source for contracts for services between human service agencies and the local transit agency.
- **Service Area** – While we have filtered the NTD data, to select similar communities, there is still significant variability in the service areas for different transit providers. Some are strictly city services, while others may be countywide or serve more than one community. For example, three of the transit services included (Humboldt Transit Authority, Eureka Transit Service, and Arcata Transit) all serve different communities within Humboldt County.
 - **State legislation governing local taxes** – Local funding levels are significantly influenced by widely varying state statutes governing local taxing authority. For example, in California state legislation requires that a portion of local sales tax revenue must be allocated to public transportation, and communities have the option to increase this base level allocation. In Washington and other states, state statute authorizes local option taxes.
 - **FTA %** – In most cases, communities with a lower FTA % have more transit service per capita or per square mile.

5.2 Local Funding Sources

To improve funding for transportation services in the Helena area, the most promising options are to increase the diversity and sustainability of local funding sources. This is also the case for transit systems throughout the nation. Many communities are increasingly focused on building and diversifying local funding because they recognize that federal funding sources are unlikely to increase and may decrease in coming years.

At the same time, robust local funding is necessary for leveraging the maximum available FTA funding. Communities that successfully leverage FTA funds must have two things: local match and professional staff with the time and resources to research and pursue these opportunities. Federal rules generally allow revenue derived through contracts and contributions to be used as local match. These include:

- Mill levies
- Local government general funds
- Contracts and contributions

There are a variety of local funding strategies that could be explored in the Helena area and it will be important for stakeholders to work together to assess the feasibility, costs and benefits of each option. A valuable resource for helping assess the pros and cons of potential local funding sources is a recent report by Todd Litman of the Victoria Transport Policy Institute (VTPI): *Local Funding Options for Public Transportation* (Litman, 2013). The overall conclusion of this study is that a variety of funding options should be used to help finance the local share of transportation improvements to insure stability and distribute costs broadly. This study

evaluates eighteen potential local funding options suitable to help finance public transit or other transportation projects and services. Cumulative scores for each option are shown in Figure 5-2 below. They are evaluated according to the following eight criteria, including a horizontal and vertical equity analysis designed to assess whether the distribution of costs and benefits is fair and appropriate.

- **Potential Revenue**
- **Predictability and Stability**
- **Horizontal Equity** – Distribution of costs and benefits on riders and non-riders of similar wealth, needs, abilities. This criteria assumes that both riders and non-riders should invest.
- **Vertical Equity** – Distribution of costs and benefits among people with different wealth ability, and needs. This criteria generally assumes that costs should be smaller and benefits greater for people who are economically disadvantaged.
- **Travel Impacts** – Effects on how and how much people travel, and whether a funding option supports strategic planning objectives, such as objectives to reduce automobile travel and increase use of alternative modes.
- **Strategic Development Objectives** – Effects on type and location of development in a community, and whether this supports strategic planning objectives, such as objectives to encourage more compact, accessible development.
- **Public Acceptability** – Scoring for this criteria was based on surveys and focus groups conducted by VTPI that investigated public preferences. However, the author notes that public acceptability of different options can vary greatly between communities based on factors such as demographics, existing tax conditions, and exactly how funding options are designed and implemented.
- **Ease of Implementation** – This criteria considers both initial and ongoing implementation costs.

In Figure 5-2 below, the consultant team has modified VTPI's cumulative score summaries by shading some of the bars orange to indicate funding options that may be possible to implement in the Helena area within a five year period. While some of these options such as contracts or an urban transportation district (UTD) have significant potential, others are far less likely to be feasible and are discussed because they were suggested during stakeholder discussions, it was beyond the scope of the project to research them adequately to definitively eliminate them, and because the consultant team felt it was valuable to illustrate the broad range of funding strategies used by different communities in the US and Canada.



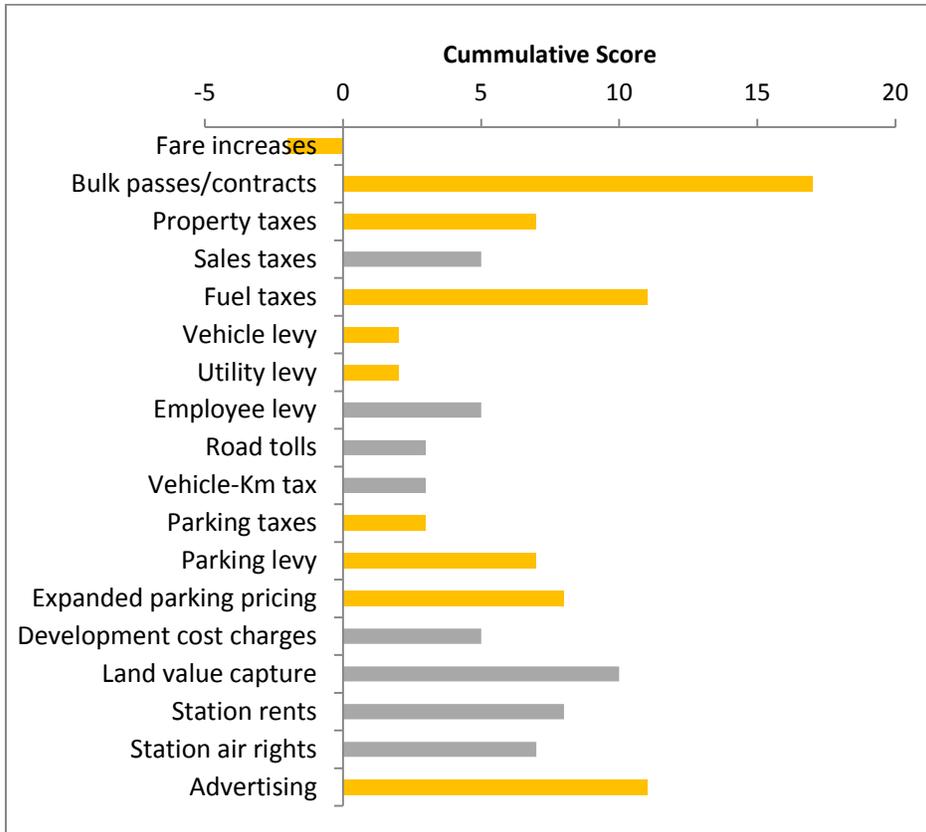


Figure 5-2: VTPI study scoring of local transit funding sources used in the US and Canada (Litman, 2013)

Of the 18 potential local funding sources scored by VTPI in Figure 5-2 above, following are summaries of important considerations for the ten options the consultant team believes could potentially be appropriate and viable for implementation in the Helena area over the next five years.

Fare increases

Fares should be set based on a rate the community deems acceptable. They could be designed to meet a target farebox recovery ratio, such as 8%, but they are not a viable tool for significantly increasing funding. In the HATS TDP, the consultant team recommended consideration of restructured fares with some fare increases designed to create an incentive for non-ADA qualified riders to use cheaper fixed route services rather than the more expensive Curb-to-Curb service. While we believe that implementing this change would result in reduced Curb-to-Curb demand and cost savings that could be invested in improved and expanded fixed route service, we do not believe this change or any other fare increase will result in significantly increased revenue.

As discussed in detail in the VTPI report, “Raising fares increases revenue, but less than proportionately (raising fares 10% provides less than 10% increased revenue), and revenue gains tend to decline over time.” Moreover, the report emphasizes that additional revenues from fare increases can be difficult to predict, and depending on how they are structured they can be inequitable with a disproportionate impact on disadvantaged populations. The fare increases proposed in the HATS TDP provide an example of how fare structures can be strategically designed to minimize equity issues while improving cost efficiency.

It should be noted that a fare free service is a viable policy in small communities and can be used as a tool to leverage other funding sources.

Contracts/bulk passes

This is the highest scoring option in the VTPI report, and the funding recommendations in both the 2007 and 2013 HATS TDPs emphasize the benefits of negotiating contracts with partners including large employers, Carroll College, human service agencies, and outlying communities. In Bozeman and many other communities around the nation, such contracts provide a significant portion of transit service revenues and federal match.

Typically, these agreements are structured so that the partner organizations employees and/or clients ride free. For example, in many communities university students, faculty and staff ride fare-free on local transit through funding that comes directly from the college, from a fee approved by the students or a combination of both sources. Muskegon, Michigan offers an example of a city-based transit system with service extending into the county funded through contracts with outlying communities.

Communities with high performing transportation systems are proactive about negotiating contracts and contributions with a variety of partners. Whenever possible, contracts should be negotiated for expanded service that serves both targeted populations and the general public. The choice of whether to negotiate a contract or a contribution can be made on a case-by-case basis depending on the needs and preferences of different partners.

A related option is a bulk purchase of bus passes. While this option is a good practice in some instances, a bulk purchase of passes cannot count as local match.

Another option for structuring agreements with human service agencies and non-profits is pass-through funding. For example, federal funding for disabled transportation can go to the local transit provider, then be passed through to a non-profit that provides the services. In addition to promoting coordination, this arrangement increases the local match the transit provider can use to leverage FTA funding.

Property taxes

Property taxes scored relatively high in the VTPI study. They are a relatively stable, widely used and potentially substantial funding source. In Montana, property taxes can be dedicated for



funding transportation services through creation of an Urban Transportation District (UTD). Action 5.5 of the HATS TDP recommends exploring the potential to create a UTD in the Helena area.

Montana Codes Annotated 7-14-201, et seq. gives counties the authority to establish urban transportation districts. A signature gathering campaign must be conducted to place a petition on the ballot. The UTD boundary can be drawn to encompass any service area configuration and does not need to follow city or county boundaries. The UTD is funded by a mill levy property tax. State statute authorizes UTD funding to be used for a variety of transportation related projects including, transit, sidewalk repair and completion, ADA accessibility, repairing unsafe intersections, as well as road and bridge repair.

UTDs are discussed on MDT's transportation financing toolkit "Financing Districts" web page⁸.

Because this funding option is sustainable and predictable, and can generate significant amounts of funding at a relatively small per capita cost, it is widely used throughout the nation. In Montana, counties that have established UTDs include Missoula, Gallatin County (Big Sky area), and Dawson County (Glendive area).

Most recently, in the November 2013 municipal election, Missoula area voters approved an increase in the public transit mill levy in the first Missoula Urban Transportation District (MUTD) ballot request since the Mountain Line transit system was created by the voters in 1976. The proposed mill levy increase of 14.5 mills will raise approximately \$1.7 million, and will allow Mountain Line to increase bus frequency on two important routes, provide late evening bus service on four routes, and expand specialized transportation service for seniors and people with disabilities. Transit supporters formed Friends of Mountain Line⁹; hired expert campaign planners; and built a large and diverse coalition of 48 organizations, businesses and community leaders who joined forces to support the mill levy request. This success illustrates the importance of coalition building, fundraising and professional campaign planning and implementation.

The appeal of a UTD is clearly articulated by one of the communities that responded to our peer survey. U-trans¹⁰ is based in the community of Roseburg, in Douglas County, Oregon. With an operating budget of \$1.55 million (2012), they serve six cities along 50 miles of the I-5 corridor. The county population is 107,667 and 70% of residents live within two miles of the U-trans' bus

⁸ For more information see <http://www.mdt.mt.gov/research/toolkit/m1/ftools/fd.shtml>

⁹ For more information see <http://www.friendsofmountainline.org/>

¹⁰ For more information see www.umpquatransit.com

routes. Their local funding includes revenue from farebox, city and county general funds, and a contract with the local community college. Commenting on these funding sources they stated:

“All of these funding sources are unstable. The County reduces funding, the cities put the transit contribution through the budget process every year and we never know if we are going to have to cut or reduce service. We are hoping to form a district that would initially eliminate the middle entities to make operations smoother and more cost effective and then implement a tax that would stabilize the funding.”

Another option would be a custom designed city mill levy that could generate funding for transit along with other related needs such as sidewalk improvements.

Fuel taxes

Fuel taxes scored well in the VTPI study because they can provide a relatively stable, low cost per capita option for transit funding. At the same time, VTPI found that in general, fuel tax increases tend to be unpopular. Equity issues make it difficult to build public support necessary to implement gas taxes. This tax disproportionately impacts low income drivers, and larger impacts also fall on rural residents who drive significantly longer distances than urban residents. However, surveys and focus groups indicated moderate support for fuel tax increases that are dedicated to transportation improvements. Administering this revenue source is relatively easy and in jurisdictions where fuel taxes are already collected.

Local option gas taxes are authorized under Montana statute (MCA 7-14-303). The statute requires approval by voters countywide and offers different ways for cities and counties to split the revenue. The tax cannot be applied to diesel fuels.

For the Helena area, a local option gas tax would likely face a number of pitfalls, as illustrated by a recent effort in Missoula to implement a gas tax of 1 cent or 2 cents per gallon to fund sidewalk improvements. A City Council subcommittee estimated the tax could net as much as \$1 million a year. The city proposed splitting the revenue with the county on a 60-40 basis – roughly the ratio of city to out-of-town residents – and the county could choose to spend their share for any project they saw fit. However, the proposal faced strong opposition from rural county residents and the county commissioners refused to put it on the ballot.

A small amount of Montana’s state fuel tax goes to public transportation, totaling \$75,000 in 2010.

Vehicle levy

According to VTPI, communities that have implemented vehicle levies to fund transit have found this to be a stable funding source. However it is one of the lowest scoring options, in part because survey and focus group responses show that vehicle levies have less public acceptance than other transportation-related revenue options. Additionally, a vehicle levy would have a



disproportionate impact on low-income motorists, especially because they tend to drive their vehicles lower annual mileage than higher income drivers.

A 2007 study (Baxandall, 2007) found that in the United States, 33 states and 27 local jurisdictions have vehicle registration fees which help finance transportation improvements – often including public transportation. However, it was beyond the scope of this project to research whether this is a local option for Montana communities.

This mechanism is used for Montana’s state-level funding. The Montana Transportation Assistance for the Disabled and Elderly (TransADE) program funds are collected through a 25-cent fee on vehicle registrations, for a statewide total of \$372,000 in 2010.

Utility levy

Adding a public transportation funding fee to other city utility fees could potentially provide a small but stable revenue source, and would likely have relatively easy implementation logistics. In communities that have implemented such fees they usually range between \$5-20 annually per capita. However, like vehicle levies, this was a low scoring option in the VTPI study because a utility levy would likely be regressive and because survey and focus group responses showed that this option had the greatest level of public opposition of all options presented.

MDT’s transportation funding toolkit includes a webpage¹¹ that discusses transportation utility fees for funding road maintenance and improvements. It may be possible for Montana communities to use this funding option for transit infrastructure such as bus stops and pullouts. However it was beyond the scope of this project to research whether Montana statute allows for this option, and whether such funding could be used for transit operations.

Parking levy

A special property tax on non-residential parking spaces could potentially provide a relatively stable funding source that generates significant revenue, assuming communities typically average roughly two qualifying parking spaces per capita according to VTPI. Surveys and focus groups indicated relatively high support for parking taxes, and this tax could encourage reduced parking supply and therefore more compact development.

However, the VTPI report offers no examples of communities implementing this option in the United States, and it was beyond the scope of this project to research whether Montana statute allows for this option.

¹¹ For more information see <http://www.mdt.mt.gov/research/toolkit/m1/ftools/fd/tuf.shtml>

Expanded parking pricing

Expanded transit funding can be generated by establishing parking fees for on-street parking or public parking lots that are currently free; or by increasing rates where parking is already priced. This was one of the highest scoring options in the VTPI report. It is a widely used option that is relatively stable, and has the potential to generate moderate revenue. At the same time it can create an incentive for using public transportation. However, installing and administering parking fees tends to have relatively high implementation costs.

VTPI recommends implementing this option as part of a comprehensive parking management program that also includes improved pricing systems, user information and enforcement practices. A comprehensive program is important for ensuring that parking fees achieve parking efficiency, but do not have unintended negative consequences such as driving customers and commercial development away from the community core. VTPI found that public acceptance of this option is mixed.

During this project, a number of stakeholders and consumers suggested charging for parking in the capital area as a way to help fund transit service to this area.

Development cost charges

Development cost charges, such as impact fees allowed under Montana statute, are a widely used tool for funding transportation infrastructure. In Montana, impact fee funding could potentially be used for bus stop infrastructure but not for operations. This option scored relatively high in the VTPI report in part because surveys and focus groups indicated relatively high support for development fees. However, potential revenue from this funding source would likely be small to moderate and highly variable since it depends on the amount of new development.

MDT's transportation financing toolkit includes a web page¹² with a discussion of impact fees. The MDT toolkit also includes web pages with discussions of two additional types of development cost charges – density bonuses¹³ and trip credits¹⁴. Conceptually, through these options a developer could fund or install transit infrastructure in exchange for permission to build at a higher density, or a relaxation in permitting requirements to fund expanded roadway capacity. However, neither of these tools is widely used and it is not clear whether they are currently available as local options under Montana statute.

¹² For more information see <http://www.mdt.mt.gov/research/toolkit/m1/ftools/dei/if.shtml>

¹³ For more information see <http://www.mdt.mt.gov/research/toolkit/m1/ftools/dei/dab.shtml>

¹⁴ For more information see <http://www.mdt.mt.gov/research/toolkit/m1/ftools/dei/tc.shtml>



Advertising

Transit agencies can sell advertising on buses, bus stops, stations, hard copy brochures/schedules, and their websites. Many transit agencies collect revenue from one or more of these advertising venues. Advertising is one of the highest scoring options in the VTPI report because it presents no equity issues, and there are typically few if any public approval/political barriers to implementation, although the aesthetics of bus stop shelters/benches can be a significant issue for neighborhoods and nearby businesses. At the same time, revenue from advertising is generally small and can be unstable.

While advertising by itself is unlikely to generate significant revenue, when negotiated as part of a package in combination with a contract, advertising opportunities can help leverage substantial funding. The consultant team recommends seeking opportunities to combine contracts and “sponsorship” advertising. For example, Big Sky Resort has a contract with the Big Sky Urban Transportation District providing substantial funding for the Skyline bus service that runs shuttles within Big Sky as well as service between Big Sky and Bozeman. The service within Big Sky is fare free, and fares for the Big Sky to Bozeman service are minimal thanks in part to this sponsorship. In exchange for an annual payment, Big Sky Resort wraps the Skyline buses with an attractive graphic. The wrap provides effective, high visibility advertising but does not block passengers’ view. The resort also enjoys good public relations through frequent mentions in Skyline press releases and advertising.



Figure 5-3: A Skyline bus with advertising wrap promoting Big Sky Resort

Using vouchers as an implementation tool

While transit vouchers are not a funding source, some stakeholders suggested exploring voucher programs as a way to provide convenient, affordable transportation services to people with mobility limitations. Currently there are some limited voucher programs being used in the Helena area. For example, because of the loss of intercity bus service, God’s Love is struggling with the cost of providing taxi vouchers which can cost \$100 for a trip to Butte. If vouchers are explored further, the niches for which they may be particularly appropriate include guaranteed rides home, transportation in rural areas of the county, and weekend/evening transportation. The costs and benefits of implementing vouchers must be compared to those of investing in can/van pool, volunteer driver services, accessible taxis, expanded transit service, and changes in demand-response service. While vouchers can be provided for eligible Medicaid clients, they are Medicaid’s least preferred option.

5.3 State Funding

Montana currently provides minimal state funding for public transportation. Thus, state funding is not currently a viable revenue source for improving and expanding transportation services. A good resource for understanding state funding programs around the nation is the annual AASHTO Survey of State Funding for Public Transportation.

The 2012 AASHTO report (AASHTO, 2012) uses 2010 data and ranks Montana is 41st in the nation in per capita state funding for public transportation. Nationwide, the average investment is \$44 per capita, compared to \$0.46 in Montana. In 2010, Montana's two public transportation funding programs spent a combined total of \$447,258:

- **Gas tax** – A fixed contribution of \$75,000 was allocated to public transportation in 2010. This funding was allocated between six local public providers who could use it for FTA match and could choose to spend it on capital or operations.
- **TransADE** – This Montana program was established by the Legislature in the mid-2000s to provide funding for services to seniors and people with disabilities. Transit agencies as well as human service agencies are eligible. In 2013, HATS received approximately \$50,000 from this program, but received no funding in 2012. Funding allocations are determined annually, and totaled \$372,258 in 2010.

The Texas Transportation Institute's 2012 Transportation Funding Guide (Texas Transportation Institute, 2012) includes a discussion of vehicle registration fees as a significant state level transportation funding source. All states impose annual vehicle registration fees or other related fees. Vehicle registration fees are the second most common source of transportation program related revenues at the state level, as more than half of states raise more than a quarter of their dedicated transportation revenues with these mechanisms. The structure of these fees varies from state to state. Many impose a simple, flat fee per vehicle registered, while others vary the fee based on factors such as vehicle type, value, weight and age. This document does not include information about how many states fund public transportation through vehicle registration fees. It was beyond the scope of this project to research the potential for implementing such funding in Montana.

5.4 Federal Funding

Federal funding is critical for transit service in the Helena area – currently totaling 52% of HATS annual budget. This funding comes primarily from the Federal Transit Administration's (FTA) 5311 program, which provides formula-based grants to states to support public transportation in rural areas with population of less than 50,000. For Montana, under the current FTA 5311 formula, the program can cover up to 54% of the net operating costs, 70% of administrative costs, 80% of maintenance costs, and 86% of the cost of capital purchases.



While it is unlikely that federal funding for transit will increase in the next several years, HATS is not leveraging all currently available FTA funding. Specifically, if HATS was able to increase local funding through contracts, this revenue could be used as match to leverage increased FTA 5311 (rural) funding. Additionally, federal Older American Act Title III funding can be used as FTA match. Many communities, such as Bozeman, use Title III funding to match FTA funds when the Area Agency on Aging agrees to contribute towards the operating costs of demand response service or other services targeted towards seniors.

A final federal funding consideration is transportation funding available through the federal employees benefit package. Helena has a significant number of federal employees, and all are eligible for reimbursement of bus fares. Additionally, if a vanpool were created to serve federal employees, the federal employees benefit package could pay the full cost of that program. It was beyond the scope of this project to fully research opportunities for funding strategies involving the federal employees benefit package.

6 Conclusions

The extensive stakeholder and consumer participation in this project demonstrated a strong desire for ongoing inclusive planning efforts. Participants identified significant unmet needs for transportation services among people with people with mobility limitations, and they offered many suggestions for improving service quality and availability. This inclusive planning process, in combination with the recently completed TDP, produced goals and recommended actions described in Chapter 1, within the following objectives:

- Strengthen the role of the Helena Transportation Advisory Council (HTAC) for coordination and mobility management activities.
- Form a local Consumer Council.
- Form a “Transportation for All” Advocacy Coalition.
- Develop a Strategic Marketing Plan.

The goals, objectives, and activities are designed to increase the quality of service and to increase ridership, through:

- Better coordination and mobility management
- Improved public participation
- Improved on-time performance
- Increased funding and more efficient use of existing funding for more service
- Improved and better marketing, information, and bus stops

The following Program Outcome Model summarizes proposed outcomes for a Phase 2 Inclusive Planning Grant. If the community is successful in receiving Phase 2 funding, this will guide grant activities. Regardless, the County, HATS, and HTAC can use this as a roadmap to improve transportation services in the Helena area over the next year and continuing beyond.



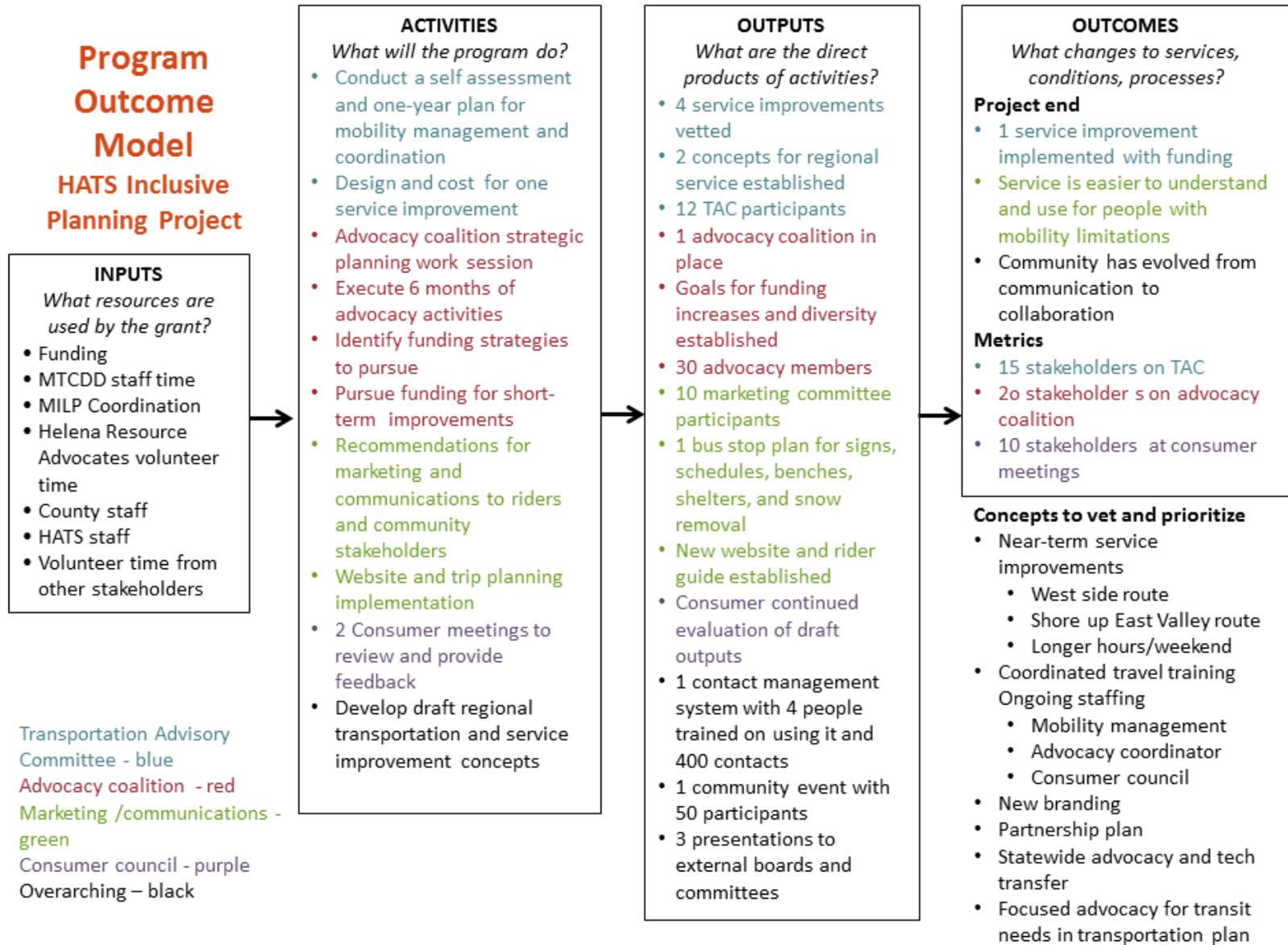


Figure 6-1: Project Outcome Model for Round 2 inclusive planning grant application

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Appendix A: Project Stakeholders & Team

Table A-1: Stakeholder participation in HITP project

Name	Organization	Senior/ Disabled	Project Workgroup	Interviewed	Group Meeting Attendee	Roundtable Attendee	Video Interview	County Commission Audience Member
Robert Allen	HTAC – Helena Transportation Advisory Council	X						X
Erik Amundson	HUD Helena Field Office				X	X		
Skeeter & Maggie Baertsch	community member	X			X			
Lois Bakovoy	community member	X			X			
Julie Banschback	community member	X			X			
Cyndy Baril	HTAC Vice Chair, RMDC - Senior Companion Program	X	X					
Peggy Barnacoff	community member	X			X			
Cathy Bennett	Helena Industries					X		
Vi Betts	community member	X			X			
Don Betts	community member	X			X			
Jean Bowlds	community member	X			X			
Charlie Briggs	Easter Seals/Goodwill-Montana, Idaho, Wyoming and Utah		X	X		X		
Ben Brouwer	Lewis & Clark County Health Department							X
Cathy Burwell	Helena Chamber of Commerce		X			X		
Melanie Bush	community member				X			
Lee Carper	MAB - MT Assoc for the Blind	X			X			
Grace Carruba	community member	X			X		X	
Lori Chamberlain	Public Affairs Officer, Army National Guard					X		
Les Clark	MILP - MT Independent Living Project	X	X		X	X		X
Janette Clark	Center for Mental Health					X		
Phyllis Clifford	Touchmark Resident	X			X			
Connie Conley	Touchmark				X			
Wendy Cook	St. Pete's Hospital			X		X		
Janet Coughlin	Rocky Mountain Development Council					X		

A-2 | Project Stakeholders & Team

Name	Organization	Senior/ Disabled	Project Workgroup	Interviewed	Group Meeting Attendee	Roundtable Attendee	Video Interview	County Commission Audience Member
Vivian Crabtree	MAB - MT Assoc for the Blind	X	X	X	X	X		X
Barbara DeBea	St. Pete's (Dialysis)					X		
Jeane Didriksen	community member	X			X			
Patti Diehl	community member	X			X			
Shawna Donaldson	RMDC - Rocky Mountain Development Council			X	X			
Jennie Ekwortze	community member	X						X
Matt Elsaesser	City of Helena		X			X		
Arlene Flynn	WestMont		X					
Theresa Gardner	community member	X			X			
Lucy Gengler	City of Helena					X		
Bev Gibson	MAB - MT Assoc for the Blind	X			X			
Susan Good-Geise	Lewis and Clark County Health Department					X		
Kelly Goodwin McBride	YWCA			X				
Vicky Greaney	MAB - MT Assoc for the Blind	X			X			
April Gregg	Our Place			X	X			
Vern Grey	community member	X			X		X	X
Bernie Grovom	community member	X			X			
Walter Hanley	RMDC - Rocky Mountain Development Council Home Deleivered Meals/HATS Advisory Board/IGTC		X	X	X			
Debbie Hanson	MAB - MT Assoc for the Blind	X			X			
Judy Harris	Helena TAC				X	X		
Jim Harris	community member	X			X			
Jacob Harrison	MTCDD Consumer Council	X				X		
James Herzog	community member	X			X		X	
Debbie Herzog	community member				X			
Carol Hugh	community member	X				X		
Will Hugh	community member	X				X		
Will Hughes	community member	X				X		
Carol Hughes	community member					X		
Andy Hunthausen	L&C County Commission/IGTC		X			X		
Jerry Hutch	MAB - MT Assoc for the Blind	X			X	X		

Name	Organization	Senior/ Disabled	Project Workgroup	Interviewed	Group Meeting Attendee	Roundtable Attendee	Video Interview	County Commission	Audience Member
Brian Johnson	United Way of the Lewis and Clark Area			X		X			
Rob Karsah	community member	X			X				
Jenny Kelly	C4MH					X			
Jeff Key	Robert Peccia and Associates					X			
Stephanie Killian	Veterans-VA				X				
Paul Kindt	PEERS				X				
J.J. Kocher	community member				X				
Tirle Lakmer	community member	X			X				
Karen Lane	Lewis and Clark City-County Health Department					X			
Erin Lavender	Helena Food Share				X				
Sandra Lowry	Area IV Agency on Aging, RMDC	X	X	X		X			
Bob Maffit	MILP - MT Independent Living Project/IGTC	X	X	X	X	X			
Michael Mahoney	Family Outreach			X		X			
Sue Mannix	community member	X			X				
Kate McCombs	YWCA			X	X				
Joyce McDonald	community member	X			X				
Erin McMahan	YWCA			X					
Rita McNees	community member	X			X				
Emily McVey	Rocky Mountain Youth Resources				X				
Alison Munson	United Way of the Lewis and Clark Area				X				
Isabelle & Walter Nelson	MAB - MT Assoc for the Blind	X			X				
Ann Nix	Veterans-VA				X				
Paul Ohr	community member				X	X			
Greg Olsen	Helena Industries, Helena Non-Motorized Travel Advisory Council				X	X	X		X
Paul Olsen	community member					X			X
Michael Oneil	Montana Home Choice Coalition					X			
Brian Persons	community member	X			X	X	X		X
Susan Pesta	WestMont		X	X		X			
Nancy Pierce	St. Pete's Hospital			X					
Kim Pillen	community member				X				
Melanie Reynolds	L&C City-County Board of		X			X			

Name	Organization	Senior/ Disabled	Project Workgroup	Interviewed	Group Meeting Attendee	Roundtable Attendee	Video Interview	County Commission Audience Member
	Health							
John Rundquist	community member	X				X		
Patrick Sanders	DPHHS-Disability Employment Transitions					X		
Fred Sergent	community member	X			X		X	
Jaymie Sheldahl	RMDC Head Start				X	X		X
Barb Sheridan	HATS TAC		X			X		
Kim Sickerson	The Friendship Center				X			
GeorgAnn Snyder	community member	X			X			
Carole Solomon	YWCA	X	X		X			
Trish Sorenson	RMDC Head Start	X			X		X	X
Lloyd Sparks	MILP - MT Independent Living Project	X	X		X			
Javid Spaulding	community member	X				X		
Peggy Stebbins	St. Pete's Hospital		X		X	X		
Twylar Stratton	community member	X			X			
Tom Stuber	MDOT/HATS TAC					X		
Sonjia Swicord	Helena Industries					X		
Deborah Swingley	Montana Council of Developmental Disabilities		X	X	X	X		
Shirley Thennis	Touchmark Resident	X			X			
David Thurnstrom	Veterans Transportation Service		X			X		
Tracey Tillinger	Veterans-VA				X			
David Torgerson	community member	X					X	
Roger Trumper	Veterans-VA		X	X		X		
Vicki Van Meter	Family Promise					X		
Lucille VanDiest	Touchmark Resident	X			X			
Joyce Vashro	Touchmark Resident	X			X			
Jim White	community member	X			X			
Joe Wojton	God's Love				X			

Table A-2: Project Team

Name	Organization	Senior/ Disabled	Project Workgroup	Interviewed	Group Meeting Attendee	Roundtable Attendee	Video Interview	County Commission Audience Member	Project Team
Elizabeth Andrews	EA Community Engagement		X		X	X		X	X
Lisa Ballard	Current Transportation Solutions		X		X	X		X	X
Matthew Cramer	SAVE Foundation, Americorps Vista		X		X	X		X	X
Laura Erikson	Lewis and Clark County		X		X	X		X	X
Ted Lange	Current Transportation Solutions		X		X	X			X
Steve Larson	Transit Supervisor, City of Helena		X		X	X			X

Appendix B: Review of Transit Development Plan

The HITP project built on the work of the 2012 Transit Development Plan. The most relevant components of the plan are included in this document as a point of reference. All Inclusive Planning Grant findings are in line with the TDP findings. The entire document can be found on the City of Helena web site.

HATS Current Services

Helena Area Transit Service (HATS), a program of the City of Helena, offers general public curb-to-curb service, one checkpoint (fixed) route in town, and the East Valley route, which is a deviated fixed route. HATS started with its curb-to-curb service, adding the other service within the last ten years.

Within the city limits, the current Checkpoint route structure serves most of the high-density areas and major attractors except the west side and some areas south of the hospital area. Outside the city limits the East Valley bus struggles to serve a geographically large area. The Veteran’s Administration Hospital has no service, nor does the north valley.

Table B-1: HATS Services and Costs

Services	Key Characteristics
HATS Weekday Services (focus of this plan) <ul style="list-style-type: none"> • Checkpoint • Curb-to-curb • East Valley 	<ul style="list-style-type: none"> • Monday-Friday 7am-6pm • \$1 million operating • \$190,000 capital (new transit center) • 85,550 rides
Additional Services <ul style="list-style-type: none"> • Trolley to the Trails • Youth Connection • Rocky Mountain senior transportation • Head Start • Intercity agent 	<ul style="list-style-type: none"> • Mixed hours and days of service • \$0.3 million operating • 21,938 rides
Total	<ul style="list-style-type: none"> • \$1.46 million operating & capital • 107,448 rides

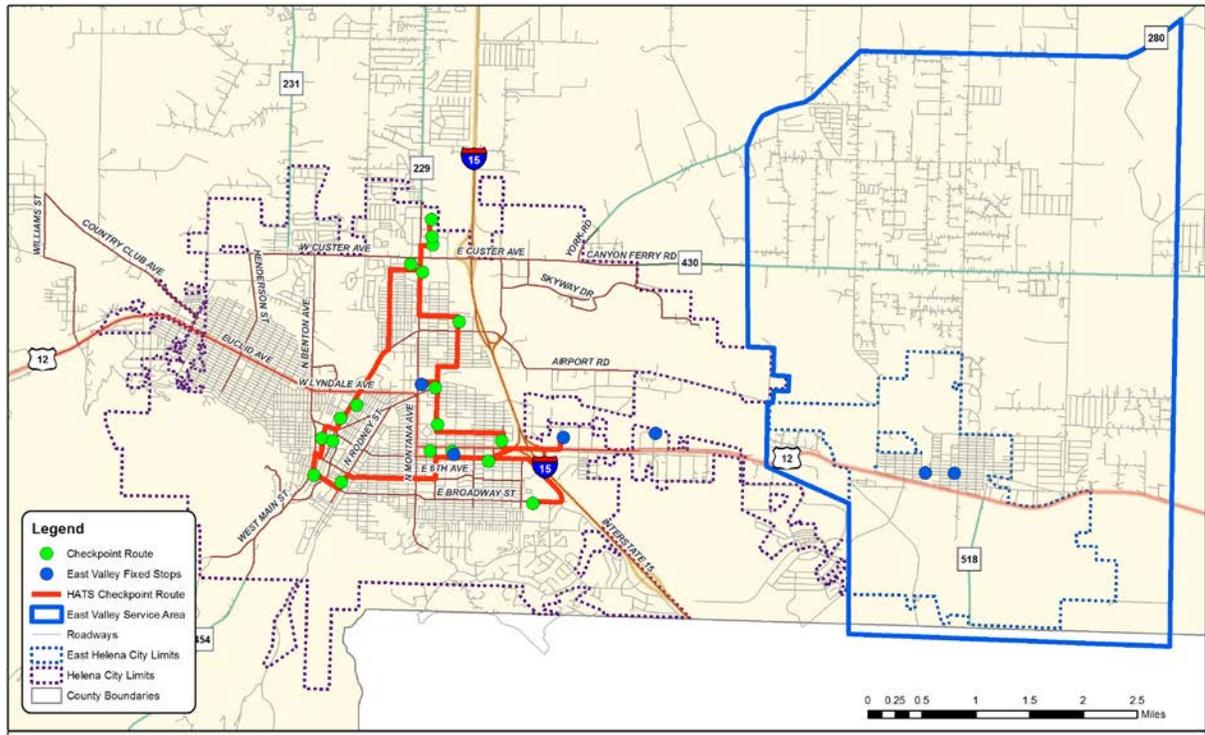


Figure B-1: HATS Existing Routes and Service Area

Successes, Challenges, & Opportunities

The following table summarizes the most significant issues and themes that emerged from this TDP update.

Table B-2: Summary of HATS successes, challenges and opportunities

Successes	<ul style="list-style-type: none"> • Important safety net service that is highly valued by riders and supported by the community • Important community benefits • New transit center • Willing to try new things, e.g. Capital Commuter
Challenges	<ul style="list-style-type: none"> • Low use by commuters and choice riders • Lack of diversity in local funding and no state funding • High cost per ride, low boardings per hour • Poor on-time performance • Limited service availability
Opportunity	<ul style="list-style-type: none"> • Evolve into broader community service while maintaining safety net

Implementation Plan

The project team has developed an action plan focused on helping achieve the HATS 2020 Vision Statement and three overarching goals. The vision statement and goals reflect the fact that HATS is at a significant stage of its growth as a public transportation provider. Our team broadly classifies community transportation systems as “safety net” services or “community services”. A safety net service primarily serves those with no other transportation options including low income populations, people with disabilities and seniors. Most transit systems start as safety net services. As they mature, many systems grow to take advantage of opportunities to serve a much broader cross section of the community while still providing a safety net function. A major focus of this planning project has been to explore the potential for HATS to take the next steps to evolve from a safety net service into a broader community service. Public and stakeholder input as well our analysis all indicate that both HATS and the Helena area community are ready to take these steps. To meet this challenge, management will need to be creative and will need to engage the community to expand its resources and ensure that opportunities are not missed.

Mission Statement

Helena Area Transit Service provides quality transportation options to access work, education, service, and recreational opportunities.

2018 Vision

HATS will continue to meet the needs of those who cannot drive or cannot afford to drive, but will also be a viable option for commuters, students, and people who have the choice to ride.

Goals

1. Improve performance, cost effectiveness, and community awareness (at or near current funding levels)

More people use HATS because buses run on time, community members are aware of HATS services, and high quality information about the services is easily available. Curb-to-curb service is available for those who need it, but doesn’t consume too many resources that can be directed towards more effective fixed routes for everyone. Bus stops are marked with signs and schedules; some have benches and shelters. Current and potential riders, and those who assist them, can easily plan trips and find other information about services. HATS is active in Helena Valley discussions including transportation; community planning; sustainable economic development; community health; human services; and housing. Good

customer service makes HATS a more convenient and more enjoyable experience, earning repeat customers.

2. Expand and evolve into a more robust service by diversifying funding sources

Helena area residents use HATS to travel to work, school, shopping and recreation. Seniors, people with disabilities, and others who are transportation disadvantaged are better served because the entire community is better served. HATS has strategically expanded routes, hours, and days of service while improving performance measures. Local funding sources have expanded beyond the City of Helena General Fund to include contributions from all local government entities or an Urban Transportation District as well as service agreements with a variety of local entities and large employers.

3. Improve management resources and continue to practice good fiscal management

HATS is running smoothly and efficiently, enabling the business to respond to community needs and market changes. HATS procures and maintains appropriate vehicles that are safe and support quality service. Good data drives good decisions. Staff is invested in their jobs because HATS offers a positive and productive work environment.

Recommended Actions

The TDP identified one-year and five-year actions in six categories that will help HATS achieve its 2020 vision and goals. Page numbers refer to the Transit Development Plan.

Table B-3: HATS 2013 TDP Implementation Plan

#	Action	Timeline	TDP Page Number
Objective 1	Implement service changes		
Action 1.1	Add a route and make route and schedule adjustments to improve on-time performance, better meet commuter needs, and improve safety.	Year 1	11-6
Action 1.2	Update fare structure to direct curb-to-curb towards people who need it.	Year 1	11-11
Action 1.3	Restrict East Valley (north of East Helena) curb-to-curb service to align with demand, density, and funding sources.	Year 1	11-12
Action 1.4	Expand fixed route and ADA paratransit to 12 hours per weekday.	Year 1	11-12
Action 1.5	Implement 2-5 year service improvements to the extent funding allows	Years 2-5	11-18
Objective 2	Improve infrastructure		
Action 2.1	Move bus stops out of parking lots and onto roads whenever possible.	Year 1	11-13
Action 2.2	Establish designated stops with bus stop signs	Year 1	11-13
Action 2.3	Begin addressing issues with bus stop infrastructure and facilities to better serve riders.	Year 1	11-13
Action 2.4	Establish designated stops with signage, ADA access, benches, shelters and schedules.	Years 2-5	11-19
Action 2.5	Parking management	Years 2-5	11-19
Action 2.6	Park & Rides	Years 2-5	11-19

#	Action	Timeline	TDP Page Number
Objective 3	Implement fleet upgrades and improve maintenance supervision		
Action 3.1	Improve maintenance documentation and procedures	Year 1	11-14
Action 3.2	Implement a financially sustainable phased vehicle replacement and fleet expansion plan	Years 2-5	11-19
Action 3.3	Work with MDT to ensure that HATS operates with vehicles that provide safe, efficient, and quality service	Years 2-5	11-20
Objective 4	Improve coordination with human services providers to minimize duplication of services and improve overall service to transportation disadvantaged populations.		
Action 4.1	Work with human service providers to develop strategies to coordinate services and funding to improve efficiency and service quality.	Year 1	11-14
Action 4.2	Continue working with human service providers to implement coordination strategies and contracts to improve and expand efficiency, funding and service quality.	Years 2-5	11-20
Action 4.3	Expand participation in the TAC to include other organizations in addition to transportation providers and health and human services agencies.	Years 2-5	11-20
Objective 5	Expand funding & partnerships to provide effective commuter service.		
Action 5.1	Engage stakeholders in TDP implementation	Year 1	11-14
Action 5.2	Consider developing a communications plan	Year 1	11-15
Action 5.3	Pursue ideas for additional revenue	Year 1	11-15
Action 5.4	Position HATS to meet growing demand for services and to become more integrated into the community.	Years 2-5	11-20
Action 5.5	Consider creating an Urban Transportation District (UTD) within the Helena area.	Years 2-5	11-21
Objective 6	Strategically implement data management and technology to improve management capabilities as well as service to customers.		
Action 6.1	Streamline data tracking through interim improvements to spreadsheets and sampling stop-by-stop ridership	Year 1	11-16
Action 6.2	Develop an Intelligent Transportation Systems (ITS) plan following a systems engineering process	Year 1	11-16
Action 6.3	Implement General Transit Feed Specification (GTFS)	Year 1	11-17
Action 6.4	Purchase and implement demand response management software	Year 1	11-17
Action 6.5	Implement the data management and ITS plan	Years 2-5	11-21
Objective 7	Create and implement a marketing, outreach and promotion plan to significantly increase fixed route ridership by commuters and other choice riders, as well as seniors.		
Action 7.1	Replace current website with a new site that meets standards for peer services	Year 1	11-17
Action 7.2	Improve and update maps and schedules	Year 1	11-17
Action 7.3	Create a brochure	Year 1	11-17
Action 7.4	Continue to improve website	Years 2-5	11-22
Action 7.5	Take advantage of opportunities for free media coverage and other free publicity	Years 2-5	11-22
Action 7.6	Develop a marketing plan with a dedicated budget	Years 2-5	11-22
Objective 8	Continue to improve management and staffing		

#	Action	Timeline	TDP Page Number
Action 8.1	Improve management of curb-to-curb through policy changes and up-to-date tools	Year 1	11-18
Action 8.2	Improve training and procedures as recommended in Maintenance & Operations Review	Year 1	11-18
Action 8.3	Practice sound and sustainable financial management	Years 2-5	11-23
Action 8.4	Provide customer service that produces highly satisfied riders and respects the needs of people with disabilities.	Years 2-5	11-23
Action 8.5	Continually monitor rider satisfaction and HATS performance, make modifications where necessary.	Years 2-5	11-23

Year 1 recommendations include major route changes for the fixed route service combined with important policy changes for curb-to-curb. By implementing these steps, HATS should improve on-time performance and service coverage while also improving two of the systems most important performance measures – cost per ride and rides per hour. Changes in Years 2-5 would expand hours or frequency of fixed route service depending on budget and community priorities.

This fixed route service expansion can be accomplished with no or minimal additional funding if HATS changes its curb-to-curb service so that it operates under policies that are standard in most peer communities – either limit the service to seniors and people with disabilities who cannot access fixed route service, or keep the service open to the general public but charge a premium rate for riders who do not qualify for the ADA rate. Following either of these changes there will be an initial adjustment phase during which there will be complaints from some current riders. However, most current riders will find that an on-time fixed route service with expanded coverage is more convenient than having to call a day ahead of time to schedule a curb-to-curb ride. At the same time, new riders will be attracted to the improved fixed route service. If HATS chooses to maintain its generous but costly open door policy for curb to curb, the existing Checkpoint and East Valley services would only be able to adequately improve on-time performance with additional funding or by cutting these routes by 25%. It also would not be possible to add a Westside-Capital route within existing budget.

Appendix C: Peer Research

Environmental Scan Inclusive Practices Factsheet

The project team developed the following factsheet summarizing inclusive practices identified through the Transit Planning for All Environmental Scan. This factsheet was used as an outreach tool to facilitate discussion at the ten stakeholder interviews and five stakeholder meetings.



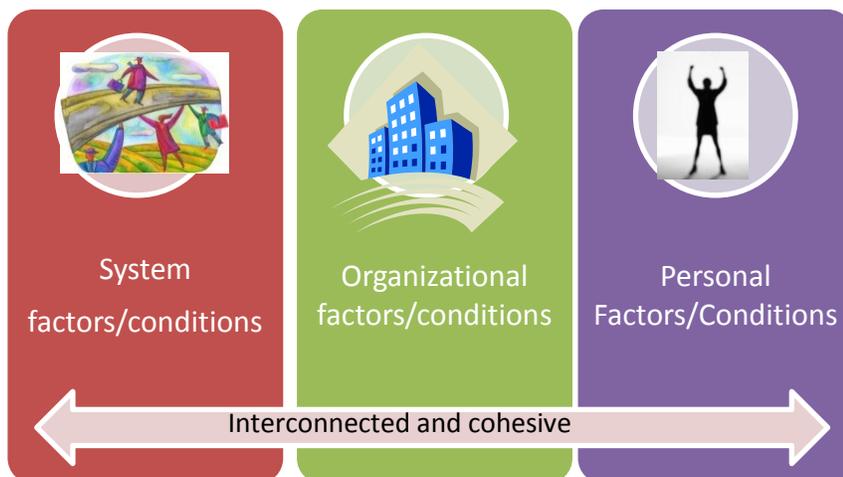
Environmental Scan Outcomes to Support the Strengthening Inclusive Transportation Partnerships Small Demonstration Grant Program

Easter Seals, in its role as subcontractor to CTAA, took the lead on the environmental scan phase of the *Strengthening Inclusive Transportation Partnerships to Promote Community Living Project*. The environmental scan process included interviews with program representatives of transportation-related organizations and human services organizations who were part of a coordinated transportation system. Interviews also took place with people with disabilities and older adults who participated in coordinated transportation systems.

Organizations may want to consider these findings as they prepare their applications for the Small Grants Demonstration Program. The strategies described in this document can be used by applicants in multiple ways:

- Learn about some of the strategies used by organizations to engage people with disabilities and older adults in coordinated transportation systems.
- Identify the factors important to people with disabilities and older adults themselves that facilitate their participation in coordinated transportation systems.
- Use these strategies/conditions to assess your own practices and convey this information in your application.
- Incorporate these strategies into your project goals and plans.
- Develop an understanding of a theoretical model to help you assess and organize strategies (at the system, organizational, and personal levels).
- Investigate outcomes (such as increased access to funding) identified in environmental scan data that indicated that the participation of people with disabilities and older adults in coordinated transportation systems results in improved transportation services for seniors and person with disabilities.

Theoretical Model Underpinning Work



Findings

What are some ways that people with disabilities and older adults participate in coordinated transportation systems?

- Participate in voluntary meetings/planning sessions;
- Provide input regarding appropriate services for people with disabilities and/or older adults;
- Serve on appointed advisory groups/steering committees;
- Encourage others to participate in coordinated transportation systems;
- Offer advice on engaging diverse stakeholders in planning and implementation of transportation services;
- Offer guidance on best practices related to specific participatory activities in coordinated transportation services;
- Attend training and provide professional development and expertise to help drivers and staff understand the needs of people with disabilities;
- Communicate and advocate through an organizations' and community legislative and policy;
- Reach out to key legislators on issues affecting the provision of accessible transportation services for people with disabilities and older adults;
- Participate in data gathering forums and complete surveys and requests for information to ensure the voice of people with disabilities and older adults informs issues.

What are some characteristics of a Coordinated Transportation System that encourage the participation of people with disabilities and older adults?

- Strong leadership structure that affirms the value of participation by people with disabilities and older adults;
- High level commitment for participation of people with disabilities and/or older;
- Needs and resource assessment processes which specifically identify gaps and needs around including people with disabilities and/or older adults;
- Diverse coalition of organizations, some of whom represent people with disabilities and/or older adults, involved in planning, decision-making;
- A formal action plan in place that identifies opportunities and activities for the participation of people with disabilities and/or older adults;
- Shares information describing the coordinated transportation system with various human services organizations whose membership represents people with disabilities and/or older adults;
- Uses various funding sources, including those that support programs for people with disabilities and/or older adults;
- System includes Medicaid trips and/or paratransit services, taxi voucher programs, mileage reimbursement program for targeted populations;
- Combines resources with organizations whose memberships are comprised of people with disabilities and/or older adults;
- Has payment systems across customer populations that are seamless;
- Includes common service standards across populations;
- Offers one-call – one click methods in its transportation service delivery.

What are some characteristics of an organization that encourage the participation of people with disabilities and older adults in the coordinated transportation system?

- Creates an environment that accommodates the physical needs of people with disabilities and/or older adults (e.g., accessible meeting facilities, flexible meeting times, availability of communication assistance);
- Establishes partnerships with external organizations that represent people with disabilities and/or older adults;
- Fosters an environment that is respectful to people with disabilities and/or older adults (e.g., using non-biased language);
- Employs people with disabilities and/or older adults;
- Engage people with disabilities and older adults in feedback mechanisms and involve them in outreach and awareness efforts;
- Has in place an accountability system to ensure that participation of people with disabilities and/or older adults is at desired level.

What personal characteristics of a person with a disability or older adult may lead to their participation in coordinated transportation systems?

- Commitment to community volunteerism.
- To influence policy.
- To stay socially engaged.
- To encourage environmental responsibility (livability – green issues).

What Outcomes Resulted from the Participation of People with Disabilities and/or Older Adults in the Coordinated Transportation System?

Environmental Scan respondents noted a variety of positive outcomes that they associated with having a coordinated transportation system that included participation of older adults and/or people with disabilities. These outcomes were:

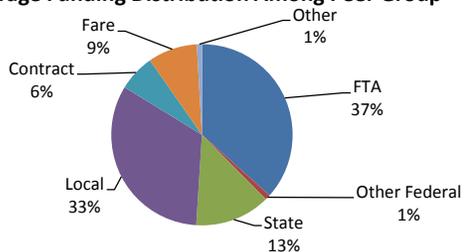
- Greater and more effective access to legislators and lobbying efforts;
- Increases in receiving grant funding;
- The creating of transportation programs;
- Decisions from governing boards that are more in line with the needs of the coordinated transportation system;
- Changes in policy that improve transportation services;
- Website accessibility for screen readers;
- Increased community awareness and support.

Funding in Similar Communities

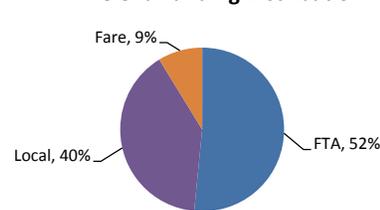
Per National Transit Database Reporting Year 2012

SUB-RECIPIENT NAME	STATE	Spent on Operating - Total Annual Expenses	%FTA	% Other Federal	% State	% Local	% Contract	% Fare	% Other
Clallam Transit System	WA	\$7,377,844	6%	0%	0%	78%	0%	14%	0%
New Castle Area Transit Authority	PA	\$7,026,719	36%	0%	48%	2%	0%	11%	3%
Marble Valley Regional Transit District	VT	\$5,340,712	46%	17%	18%	15%	0%	3%	0%
City and Borough of Juneau	AK	\$5,198,075	15%	0%	2%	63%	0%	15%	3%
Mendocino Transit Authority	CA	\$3,753,881	11%	2%	9%	60%	2%	14%	2%
Advance Transit, Inc. NH	VT	\$3,711,529	60%	3%	2%	10%	0%	0%	24%
Chillicothe Transit System	OH	\$2,830,254	38%	0%	6%	14%	40%	2%	0%
Humboldt Transit Authority	CA	\$2,526,068	10%	0%	0%	49%	0%	41%	0%
Central West Virginia Transit Authority	WV	\$2,278,168	22%	0%	0%	71%	0%	6%	0%
Incorporated County of Los Alamos	NM	\$2,220,045	52%	0%	0%	48%	0%	0%	0%
City of Manitowoc	WI	\$2,086,126	44%	0%	21%	26%	0%	9%	0%
Basin Transit Service	OR	\$2,073,843	19%	0%	15%	54%	0%	12%	0%
Twin Transit	WA	\$1,908,331	6%	0%	11%	76%	0%	7%	0%
City of Durango	CO	\$1,781,636	52%	0%	0%	34%	7%	8%	0%
Fairmont Marion County Transit Authority	WV	\$1,775,591	27%	0%	0%	63%	2%	8%	0%
OCCK, Inc.	KS	\$1,715,432	47%	0%	14%	29%	0%	9%	0%
Ketchikan Gateway Borough	AK	\$1,678,416	53%	0%	0%	34%	0%	12%	0%
Douglas County	OR	\$1,552,053	41%	0%	11%	30%	1%	18%	0%
Crawford Area Transportation Authority	PA	\$1,524,927	18%	0%	31%	2%	36%	13%	0%
Human Resource Development Council (Bozeman)	MT	\$1,482,177	58%	0%	4%	36%	0%	1%	0%
City of Stevens Point	WI	\$1,392,709	46%	0%	21%	28%	0%	6%	0%
City of Galesburg	IL	\$1,319,227	23%	0%	65%	7%	0%	4%	0%
First Transit-Cortland	NY	\$1,280,594	16%	0%	33%	4%	33%	13%	0%
City of Roswell	NM	\$1,265,034	53%	0%	0%	40%	0%	7%	0%
First Transit - Clinton	NY	\$1,262,175	12%	0%	62%	2%	15%	10%	0%
Rose View Transit & Paratransit System	IN	\$1,242,970	42%	0%	29%	12%	0%	17%	0%
Frankfort Transit System	KY	\$1,242,551	49%	0%	0%	48%	0%	3%	0%
City of Helena - Helena Area Transit Service	MT	\$1,228,670	52%	0%	0%	40%	0%	9%	0%
Northwestern CT Transit District	CT	\$1,202,621	55%	0%	24%	9%	6%	5%	0%
City of Oxford	MS	\$1,193,113	52%	0%	0%	42%	4%	2%	0%
Bluefield Area Transit	WV	\$1,141,240	39%	0%	16%	22%	3%	20%	0%
MARION TRANSPORTATION SYSTEM	IN	\$1,096,275	50%	0%	25%	25%	0%	0%	0%
Butte Silver Bow Transit	MT	\$1,043,950	55%	0%	0%	41%	0%	4%	0%
Belknap-Merrimack CAP/Concord Area Transit	NH	\$939,510	63%	0%	0%	23%	2%	12%	0%
Flathead Area IX Agency on Aging (Kalispell)	MT	\$926,895	55%	7%	0%	33%	0%	6%	0%
City of Eureka dba Eureka Transit Service	CA	\$888,753	19%	0%	0%	0%	81%	0%	0%
VNA Home Healthcare, Hospice & Community Service	NH	\$666,480	39%	8%	0%	32%	17%	3%	2%
Watertown Citibus	NY	\$408,820	9%	0%	44%	41%	0%	6%	0%
Average		\$2,094,300	37%	1%	13%	33%	7%	9%	1%

Average Funding Distribution Among Peer Group



Helena Funding Distribution



Notes:

- Assignment of funds to categories can be subjective.
- California systems include contracts in fares to meet minimum farebox requirements to get state funds.
- Bozeman includes contracts in local funding. Categorized to maximize local match dollars for federal funds.
- Non-FTA federal funds can be used in contracts for services.
- State legislation can set minimum local tax level (e.g., California), or offer local option tax (e.g. Washington).
- Lower FTA % usually relates to more transit per capita or per square mile.
- 3 operators (Humboldt Transit Authority, Eureka Transit Service, and Arcata Transit) serve Humboldt County.

Appendix D: Summary of Stakeholder Input

The first section of this appendix includes insights and comments from the stakeholder group leaders we interviewed. The subsequent sections include quotes and comments collected from consumers and organizational staff throughout the project – primarily from the group meetings. Many are direct quotes, others are paraphrased comments from project team members' notes.

Summary of themes and needs from Interviews and Group Meetings

Theme 1 – Expand the geographic coverage of transit service.

The strongest interest in expanded service focused on the north and west valley areas. All stakeholders involved in serving veterans stressed the need for service to Fort Harrison. Overall, stakeholders prioritized expanded service in and immediately adjacent to the city over expanding service further into the county. At the same time, there was extensive discussion of the significant need for service in the county and what forms of service could be most achievable and effective.

Theme 2 – Explore implementing and expanding non-transit transportation services.

Some participants pointed out that neither fixed route nor curb-to-curb service will be viable or appropriate for meeting the needs of all people with mobility limitations, especially those living outside city limits. They commented and made suggestions about several non-transit options that could be explored:

- **Park & Ride** – Park and ride locations should be explored in East Helena, the valley and other outlying areas.
- **Taxis** – While many participants commented on the prohibitively high cost of taxis, they also identified a need for accessible taxis. Some suggested exploring whether subsidized rates would be possible for people with mobility limitations.
- **Volunteer Drivers** – Some volunteer driver programs currently exist, but they are very limited and not meeting community needs. Numerous participants at different events commented that they currently rely heavily or entirely on family and friends for transportation.
- **Car and Van Pooling** – There was some interest in exploring carpool and van pool options.

Theme 3 – Improve the quality and availability of fixed route service.

For most stakeholders, top priorities for improved fixed route service were improved on-time performance, shorter wait times, longer operating hours, and weekend service. One consumer suggested running buses in opposite directions on loop routes to reduce travel times.

Two specific suggestions were offered for East Helena. Participants suggested putting a bus stop on Main St. at the library, because currently the bus stops at City Hall which is too far for seniors to walk to the Senior Center/Fire Station. They also noted that on the two days per week that the Senior Center is open it would be best if the bus stops directly at the Senior Center, especially during icy conditions.

Theme 4 – Quicker Curb-to-Curb response time.

Many participants commented that the current requirement of calling 24 hours in advance to reserve a Curb-to-Curb ride often does not meet consumer needs. Medical appointments and other unplanned necessities come up that require transportation on much shorter notice. Some suggested changing the policy to two hours, or creating a policy allowing shorter wait times for reasonable emergencies.

Theme 5 – Improve intercity bus service between Helena and other Montana communities.

During this project, as well as the interviews for the HATS TDP, a number of stakeholders cited intercity bus service as severely lacking in our state. This poses significant barriers and hardships for people with mobility limitations when they need to travel to other communities. Some participants cited communities such as Billings, Butte and Missoula as important destinations, while others highlighted the need for transportation services to other towns in the county like Lincoln and Augusta, and towns in adjoining counties like Montana City, Boulder, and Townsend.

Theme 6 – Change and consistently apply policies to improve bus riding experience and better meet consumer needs.

Some participants cited inconsistent policies and policy enforcement under which HATS rigorously enforces a policy limiting consumers to transporting only one bag of groceries, but does not enforce policies about personal behavior on buses – people under the influence of alcohol and drugs, and people who are filthy (“covered in urine and feces”) are allowed to ride. Many suggested allowing consumers to bring more baggage on the bus – especially because the current one-bag policy is a barrier for people using the bus to access the Food Share.

Theme 7 – Improve communication and marketing for HATS’ services.

Many participants said it is currently difficult to find up-to-date, accurate and easy-to-use information about existing services. While we found that people with mobility limitations use technology less than the general population, human service agency staff and some consumers suggested improved web-based information, as well as technology

such as real time bus location tracking that could help riders minimize the time they wait for buses in bad weather. Additionally, as discussed below, numerous suggestions were offered for places to post hard copy information such as bus schedules.

Theme 8 – Improve and maintain pedestrian and bicycle infrastructure to ensure safe ADA access to bus stops.

Gaps in the sidewalk system and poor snow removal on existing sidewalks were cited as significant problems. The North Valley was cited as an area that is extremely hazardous, and in many cases impossible, for people with mobility limitations to travel by foot or wheelchair.

Theme 9 – Construct bus stops with shelters, and benches.

Though secondary to issues such as on-time service and geographic service coverage, the lack of bus stop amenities was cited as a barrier to using existing fixed route service.

Theme 10 – Implement travel training programs.

A number of stakeholders such as the Montana Association for the Blind felt that travel training would be very beneficial for their members/clients/consumers.

Theme 11 – Implement driver and staff training for working with people with disabilities.

There were a number of comments about the need for more sensitivity and knowledge on the part of drivers and phone operators.

Theme 12 – Ensure that community leaders that represent seniors and people with disabilities are invited to the table.

While some of participants felt they have had a voice in planning transportation services, none felt that stakeholders have a voice that is united, strong and/or successful. There was strong support for a strengthened TAC and a stakeholders advocacy coalition to address this issue.

Theme 13 – Design planning opportunities that are inclusive of individual consumers as well as stakeholder organization leaders.

Some participant commented that planning opportunities are generally more inclusive of organizational leaders rather than consumers. Most feel that the greatest planning barriers are challenges to getting true engagement of people with mobility limitations in the planning process. Many felt people with mobility limitations have a much better understanding of transportation challenges in our community than elected officials and city staff. However, in order to be engaged and ultimately make a difference, people with mobility limitations will need to be more aware of planning opportunities and key decision points.

Specific suggestions included creating a consumer council; collecting input at locations and times where people with mobility limitations are already gathering; holding planning meetings at times and locations where people with mobility limitations could use transit to access the meeting; and providing opportunities for participation that don't require travel – such as using an online forum to solicit comments. As an alternative to the idea of a new consumer council, some commented that they don't want a new meeting to attend, and suggested adding transit as an agenda item for the Helena Resource Advocates meeting through RMDC. There was lots of support for this idea at the HRA meeting attended by project team members.

Theme 14 – Identify and develop more sustainable sources of transit funding. Possible funding sources suggested included a UTD and/or parking fees. There was one suggestion for an employee tax.

Most felt that currently the greatest barrier is that funding is not adequate, sustainable or reliable. Some felt there is a need to supplement governmental funds with other sources of funding and at a level high enough to meet the growing demand both in the city and in key areas of the county. They expressed concerns about depending solely on city and/or county general budget funds each year for transit “match” each year as those funds can be uncertain. Some felt it would be valuable to hear from Missoula, where there was recently a successful ballot issue to increase the existing transit district. Several suggested that raising parking costs in lots and using meters in key places like the capital could provide revenue for funding expanded city service (e.g. west side route) while also creating an incentive to use transit.

Theme 15 – Develop voucher/mileage reimbursement services for people with mobility limitations.

Voucher programs appealed to stakeholders because they could offer the flexibility to provide transportation options to people in diverse geographic locations and on weekends and evenings.

Theme 16 – Strengthen the HATS Transit Advisory Committee (TAC) and give the TAC a more active role in transit planning.

Several stakeholders commented that the TAC played a key role in establishing the East Helena service, but has been less effective and engaged since then.

Theme 17 – Conduct outreach and develop partnerships with human service transportation providers, and community partners that have large numbers of customers and employees who could benefit from improved transportation services.

Most stakeholders felt HATS could do a better job of coordinating (and perhaps even consolidating) some services with other transportation providers, as well as seeking out and cultivating public-private partnerships with major employers and other business

community members. One commented that lack of awareness on the part of business leaders is perhaps the most significant barrier to improving HATS. Another suggestion was to have a transit representative give regular reports to the business community.

Theme 18 – Consider periodic, short consumer surveys that are more frequent than the TDP needs assessments that are conducted every five years.

Theme 19 – Conduct an in-depth assessment of where people with mobility limitations live, work and access services in the Helena Area, and plan for safely and effectively moving that demographic.

Theme 20 – Whenever possible, transportation service improvements should be designed to benefit all residents, not just people with mobility limitations; and whenever possible services should not segregate people with mobility limitations.

Many Working Group member as well as interview participants felt that this should be a guiding principal.

Stakeholder Interview Comments

The stakeholder organization leaders interviewed had many questions, but also had a strong understanding of their constituents' needs and of many aspects of the current situation as summarized in the following comments:

- Most perceived HATS as a positive asset to the community with room for improvement, particularly for people with mobility limitations like seniors, those with disabilities and people with low income. Many think the time is right for Helena area citizens and local elected officials to consider sustainable funding options for expansion of services.
- Transportation is a priority for all group leaders interviewed. Most serve members/clients/consumers who live in both the city and the county.
- Most stakeholders said that their members/clients/consumers use the following transportation options (often in combination) to get around the Helena area: walking, public transit, private carriers, biking, wheel chairs and carpooling with family members.
- Examples of destinations important to people with mobility limitations include work places and essential services like healthcare and places for education, childcare, shopping, recreational, social and faith based opportunities.
- Most said HATS' Curb-to-Curb service is more heavily used and more important than HATS' Checkpoint route for their members/clients/consumers. Checkpoint's poor on-time performance, long travel times and limited service coverage are all reasons for this current situation.
- Initially most focused the interview discussion on the need for improved city service, utilization and strengthening of the HATS Transit Advisory Committee and/or the need

for more funding, then went on to talk about the need for expansion of service to the North Valley and West Valley. Many were not aware of the funding issues around the East Helena Service, and those that were expressed concern about that situation. A few mentioned the need for some kind of service to and from other towns in the county like Lincoln and Augusta and towns in adjoining counties, like Montana City, Boulder, and Townsend.

- Most felt that infrastructure like sidewalks and bike lanes in and around existing and future transit stops needs to be addressed as there are sometimes no sidewalks or the existing sidewalk is hazardous and people with mobility limitations need to be able to safely access a bus stop if they are able. Timely removal of snow from sidewalk infrastructure was mentioned by many as a major concern for seniors and people with disabilities.
- Most envisioned a transit system that will continue to prioritize meeting the needs of those who cannot drive, while also expressing an understanding that creating more commuter opportunities that will benefit all who use the system.
- Most felt that the role of local government when it comes to transportation is to be aware of and develop plans that address the needs of all community members, as well as, construct, maintain and repair infrastructure, with all users in mind.
- Several stakeholders emphasized the fact that transportation plays an important role for people with mobility limitations not only from an “access to services, educational and social opportunities” perspective, but also from a workforce development perspective. People with mobility limitations often have jobs after five and on weekends when no transportation services are currently available.
- Most felt the quality of communications about and marketing around HATS current services is poor.
- Most felt that service needs to be improved and expanded.
- Many felt the existing Curb-to-Curb service is working, but there is need to expand some kind of similar service to key areas of the county.
- Most felt that the existing Checkpoint fixed route service just barely meets the needs of the senior and disability communities and significant service improvements and expansion are needed.

Consumer and Stakeholder Comments

Both consumers and stakeholder group leaders offered a wide range of comments and suggestions during the group meetings. These comments fell into the following broad categories.

Value of Public Transportation



Many comments focused on the value of transportation services and the important role that HATS plays in the Helena community:

- People with mobility limitations use HATS to access basic needs such as employment, shopping, childcare, medical, education, community events, and recreation.
- “For a person with a mobility limitation to get a job, it must be on the bus line.”
- The rapidly aging population will require transit into the future.
- Approximately 80 percent of God’s Love clients ride HATS. God’s Love requires clients to get jobs, but many clients have had to refuse jobs because the bus didn’t run late enough. For instance, they couldn’t return from Walmart in the evening.
- Approximately 70 percent of YMCA residents use HATS and would love to see the system expanded. YMCA clients ride HATS, but they have to supplement the trip with extensive walking. One person has an additional 30 minute walk to work at Costco.
- Transportation is key to success for seniors living both in the city and in the county. Many who no longer drive need help getting to services and healthcare appointments, but also for social opportunities.
- County government has an essential role to play to help people with mobility limitations achieve self-sufficiency, independence and integration into the community.
- One rider has regularly ridden HATS for six years since being diagnosed with cancer.
- Several participants who work at Fort Harrison (VA) commented that the lack of transportation options, including the lack of bike lanes, is a barrier to hiring disabled veterans, to people who would like to volunteer, and to residents and clients.
- One rider who lives at Leisure Village (East Valley), depends on the bus because he does not have a license. However HATS only has one stop at 1pm, making it difficult to keep appointments.
- Riders use HATS to get out into the community – as simple as Chinese food or McDonald’s for lunch.
- “HATS is needed for people to be independent, if people want to go somewhere.”
- “My grandmother used to use curb-to-curb and wouldn’t have been able to live independently without the service.”
- “I would use HATS to access the Capital Complex to avoid the hassles of parking and wintry conditions.”
- HRA meeting attendees unanimously felt transit is important to their clients.
- The biggest risk for people with mobility limitations is not being able to access the community, which significantly impacts their quality of life.
- The cost to the rider must remain affordable.
- Non-riders lack the awareness of the unmet needs

However some participants, especially some senior drivers and rural residents, do not value HATS.

- “We are country people who are used to driving everywhere. Even a block away. There is not a system here like the city. Don’t turn Montana into California. If you want to move to Montana, move for Montana values...Roundabouts are about the only good city import.”
- “People in our community want to drive their cars. They do not want to convert to bus riding. Cultural change is tough to overcome.”

Needs

Many comments focused on unmet needs. One participant summarized it best: “Better hours, more stops, sheltered bus stops, weekend service, clear pedestrian access to bus stops, GPS tracking for fixed route and curb-to-curb so users are not waiting in the elements for extended amounts of time.”

Increased service within the city

Weekends

- “The bus dies on the weekends and arises on the weekdays”
- “I am on lockdown in the evenings and on weekends.”
- Top priority for weekends is Saturday mornings. Need the time to run the typical Saturday errands people with private vehicles do, such as going to the bank, and doing laundry.
- Currently must walk or rideshare to Our Place on the weekends.
- On Sundays cannot go to church

Longer hours

- Limited hours = limited access to jobs.
- Ten Montana Association for the Blind (MAB) meeting participants would be interested in Curb-to-Curb in the evenings.
- There is an interest in transit to enjoy Helena’s “nightlife”; social things and to help prevent drinking and driving.

Westside

- It is a long walk to ride HATS part way and walk the remainder to access the West side.
- State Capital Commuter Route should be resurrected.

Higher frequency

- Want more frequent bus service and appropriate shelter to wait for the bus. This is especially true during inclement weather.
- If a bus is missed the wait time for the next bus is a burden, because of the infrequent service.

- An infrequent rider only uses HATS when he has to. He arrives extra early so not to miss his appointments. “To put it bluntly, this transit system is kind of sad.”

Higher demand in the winter

- October through May transit is most important due to icy conditions that impede biking and walking

More service, in general

- The need for more stops; broaden the route
- Increase stops
- More convenient

Shorter travel times

- Two buses circulating opposite directions would improve travel times

Resource for fixed route planning

- The school district has done extensive analysis of bus routing, so may want to piggy back on their research.

Service suiting the capital city

- “Helena as the Capital City with poor bus service is a crime.”
- “With Helena being the capital city our transit system should be a showcase”
- “HATS is not a real bus system. It is a lousy system with a screwed up schedule.”
- “Transit is important to all our member organizations and crosses all our issue areas. Not enough in the city and none in county is a problem for a capital city with many social services.”

Service outside the city

In general

- From a non-rider: “It would be nice for the North Valley and the VA to have similar service as East Helena. Why not Boulder and Townsend for that matter? Any town that relies on Helena for services.”
- City resident wants to visit areas outside of the city. Other places people want to go: the fairgrounds (currently dropped off at Henderson, use the shared use path, cross Custer into unpaved driveway into the Fairgrounds), Spring Meadow Lake, Farm in the Dell.
- Transit service in city and county are key to success for family's dealing with disabilities.
- Jefferson County has fastest growing senior population and no transit.

North Valley

- Park and rides in the Valley, East Helena and outlying areas to get into town.
- Six MAB attendees said they would use Curb-to-Curb if it was available in the North Valley.
- Increase coverage area to include the North Valley
- Several North Valley residents commented that a fixed route in that area would be of little use to them because Montana Ave. is not safe to cross for a person with disabilities and because there are no sidewalks on Montana Ave. or on the streets that feed into it.
- A non-driver used to ride the curb-to-curb out to the North Valley to visit friends. Would like to see this return. Some of his friends currently living in the North Valley are home bound.

East Valley

- Transportation in the East Valley is one direction; if you live on York, Wiley, Tizer, etc. you have to go out to East Helena to get back to town.
- East Helena bus stop on Main St. at the library/ City Hall is too far for seniors to walk to the Senior Center/Fire Station. Especially when icy, add a stop at the Senior Center. Senior center is open two days/week, on Wednesday and Friday.

Veterans Affairs

- Would like to take HATS to the V.A. and not use a DAV van. (Has issues about DAV).
- Transit important to disabled vets and employees. Can get to doctor appointments under VA service but not everything else.

Reinstate intercity bus service

- The intercity bus shutdown has been big for seniors. They are unable to go to Billings and Missoula.
- God's Love is struggling with taxi vouchers, paying \$100 to Butte, because of the absence of intercity bus service.
- Lack of bus service to Butte and Great Falls
- "Bring back intercity bus service"

Sidewalks/Infrastructure

Infrastructure and Maintenance Needs

- Sidewalks need to be in place for full inclusion; narrow and incomplete.
- East Helena sidewalks not contiguous
- Sidewalks narrow and tilt in East Gate. People walk in the street.
- "Montana Avenue is the worst road we have in the city. " Have to walk on a combination of sidewalks, parking lots, and the street, risking getting hit by a car! And this is a major street!

- Bike routes and bike racks key component
- Snow removal priority routes for sidewalks would be beneficial

Travel distance

- Our Place clients are used to walking; under half a mile is ideal.
- In the winter, some people said they were afraid to walk any distance to a bus stop because of snow and ice and the fear of falling. In the summer, a little walking is okay.
- Many seniors need curb-to-curb. “If I can’t drive I likely can’t walk very far.”

Related Issues

- Some clients have a barrier to biking and walking due to mental health issues.
- Issue of police officers potentially ticketing wheelchairs users for riding in the street when sidewalks weren’t accessible.

Curb-to-Curb

- Many expressed that calling in 24 hours in advance doesn’t meet many needs. Medical appointments and other unplanned necessities come up that require immediate transportation. Would prefer two hours to request a pick up. Perhaps limit immediate pick-up to a reasonable emergency, then HATS should accommodate the need.
- Some felt that HATS accommodating same day notice is not realistic.
- Tightening who is eligible for Curb-to-Curb may help achieve timelier scheduled stops.
- “HATS should create a normal bus system, not the taxi-like service we currently have.”
- “There is a lingering sentiment that expanded fixed routes won’t work. This is tough to overcome for a real system.”
- “My biggest pet peeve is riders who abuse the openness of Curb-to-Curb. In my eyes Curb-to-Curb ought to be reserved for people with disabilities and seniors.”

Bus stops

There was universal, broad-based support for the importance of marked stops, benches, and shelters:

- All Our Place attendees felt the existence of bus shelters increases use.
- Need clearly marked stops
- Bike racks coupled with bus shelters would be a good idea, acting as trip extenders.
- There was much support for the concept of an “Adopt a shelter” program. Some felt this could be a first step toward increasing awareness and private investment in transit from the business community
- Need more communication for identifying where to wait and shelter from the elements. For example when the stop was moved from Good Sam’s the Office of Public Assistance,

people would miss the bus for weeks. There has been confusion about the stop at Our Place due to the presence of a “smoking shelter” on the property.

Information / Communication

HATS has the opportunity to better design their information

- HATS webpage is difficult to understand so “we might as well call in to find out the route.”
- Schedule is not user friendly
- RMDC Head Start employee (non-rider) finds the service and schedules confusing to use for families and clients.
- College educated advocate in his 30’s with no disability cannot locate bus stops or information about HATS.

Where to post schedules

- At bus stops and the transit center.
- A new resident would like to see high visibility maps at marked bus stops and bus stops and a transit center located downtown like Missoula.
- Provide a large map for the agencies. Bozeman produces poster schedules for key organizations.
- Put schedules at East Helena Senior Center and East Helena Fire Hall.
- Email agencies and retirement homes with updates and they will notify clients. For example, the recent route update, they will print the new schedule.
- Our Place clients prefer verbal communications better than handouts.

Majority of consumer participants reported no access to computers and cell phones, but some among every user group have access to technology and use is growing.

- Utilize GPS, so riders can track bus location.
- Get info on the bus system for HRA participants: cell phones with texting (7/14); computer access (2/14); brochures (majority);
- Our Place participants: 4 use cell phones, 3 use computers. Personal communication is the best communication option.
- We noticed high use of smart phones among younger people with developmental disabilities.

The quality of the ride

- The bus should be on time
- Many felt consumers should be allowed to bring baggage on the bus
 - Difficult to access the Food Share, especially with only being able to have one armload of groceries on the bus.

- One rider would feel safer with seatbelts.
- Availability to transport strollers, bikes, etc. on the bus
- Bike racks on all buses
- Many people mentioned an uncomfortable, bumpy ride
 - Caused by drivers diverting from the set route with extra speed bumps?
 - One homeless person who doesn't own a vehicle is not able to ride Curb-to-Curb any longer due to back issues and the bumpy ride (get better shocks).
 - North Valley resident rode HATS once years ago as a learning experience for her young son. Found the ride uncomfortable.
- Temperature varies with individual driver preference.
- Seniors often don't mind if it takes a long time. They don't often need it first thing in the morning or for it to be fast and direct.
- Interest in laminated bus passes that would last longer.
- Concerned about the prerelease clients (formerly incarcerated) riding the bus.

Service Schedule

- New fixed route schedule of 1:15 hour increments is confusing.
- A frequent HATS rider has issue with the frequent schedule changes and extended waiting times (is used to the transit system in Denver, CO).
- Lack of reliability. The bus may stop or may not. The times are inconsistent. This is from experience with a child going to school in East Helena four years ago when living in the valley.
- Burdensome requirement to arrive at the Curb-to-Curb pick up location 10 minutes beforehand, which leaves people out in the elements waiting.

Travel Training

- Two non-rider older adults from East Helena said they might take advantage of travel training
- Seven MAB attendees said they would be interested in Travel Training.
- Resource: The Summer Orientation Program (SOP) is a month long training program for adult Montanans who have recently experienced vision loss. It offers an introduction to those skills and strategies, which make it possible for those new to blindness to remain active and independent. It is held each summer at Carroll College in Helena, Montana. <http://mtblind.org/programs.htm> They don't do any training on using buses. If a bus were provided they would be interested in incorporating that into their travel training.
- Resource: Montana Independent Living Project provides travel training on HATS to its clients.

Customer service from staff

HATS bus drivers are mostly perceived as friendly.

- Reported that a HATS driver doesn't want to load the wheel chair (on fixed route?).
- All Our Place attendants feel welcome on the bus.

Phone service needs improvement

- "Calling in at HATS staff can be nasty!"
- Calling in a day in advance is not working. Sometimes needs to get somewhere the same day, such as unforeseen medical appointments.
- "HATS is rude and puts me on hold. Sometimes it is easier to use a wheelchair than to deal with HATS on the phone."
- Bus phone lines close at 4:30 (used to be 5:00pm). Missed opportunities to schedule a ride the next day.
- Staff need customer service training for working with people with disabilities. They need a better understanding of customers with special needs. "Staff need to care, help, and teach."

Rider etiquette

- One rider is degrading to bus drivers and other passengers.
- "Need consistent policy enforcement. Filthy individuals (covered in urine and feces) are allowed to ride the bus. Also, people under the influence of alcohol and drugs. However, people are only allowed to carry one armload of groceries."

Welcoming and Respectful Environment

A number of comments addressed issues concerning the inclusiveness of HATS' current service and details of ADA requirements.

- "Short buses have short comings... Separate is not equal."
- "I don't want to ride a special bus because I have a special need. I want to ride a bus to get to work.... Treated like a human not a toy."
- Disability etiquette would go a long way. Need to train bus drivers
- Story from someone in wheelchair riding the fixed route. Took extra time to be "anchored in". Next boarder complained, HATS driver empathized with the boarder. Rider in wheelchair felt like a barrier to others traveling and the prejudice of others on the bus.
- A hurry up attitude from drivers to people with mobility limitations. "I'm not an athlete."
- One person felt paratransit should be temporary, full inclusion is the goal.
- Federal ADA regulations require ADA paratransit (i.e. curb-to-curb) with fixed route.
- Curb-to-Curb is more expensive than fixed route

Transportation Options

In addition to commenting on HATS' services, a number of participants discussed other transportation options that are currently available.

Taxi

- Vision impaired individual who works part time at VA said it is very expensive for him to travel by taxi to and from Fort Harrison.
- One participant commented on the high cost (\$20) for someone staying at Touchmark and taking a taxi to attend the MAB summer orientation program at Carroll College.
- "Taxis are outrageously expensive; can they lower rates for certain riders or subsidize the rates?"
- Accessible taxis are needed in Helena.

Transportation Assistance Currently Available

- RMDC Senior Companion provides rides to elderly clients. Rocky is currently not meeting the demands with the supply of volunteer Senior Companions; this impacts transportation.
- Eagles has bus service to special events which is appreciated.
- Disabled American Veterans Vans for Veterans Administration appointments – but not to go to work at the VA or other reasons to go to Fort Harrison.
- Rocky Mountain Youth Resource uses two vans for transport, paid for with grant funding. Clients don't do well in large groups of strangers. Used HATS in the past but drivers weren't always accommodating (driver training would be of benefit).
- Many participants help each other with driving, carpooling and picking each other up if unable to drive.
- Many people with vision impairments rely heavily or entirely on family and friends for transportation.

Personal Vehicles

- Many seniors still drive and never use the bus.
- One senior drives herself but does not like driving on ice. She would use transit during inclement weather to access the Neighborhood Center.
- "I still drive. If I didn't I have family such as children and many grandchildren in the area I'd be in trouble. I'm lucky."
- One mental health client rode HATS years ago. His family gave him an unreliable car (a private vehicle is a precious privilege); he knows the day is coming when he will need to ride the bus again.
- The cost of driving is a problem for consumers with lower incomes.
- One senior said she would like help at the gas station, cannot pump her own gas.

Organizations that pay for transportation

- God’s Love hands out 10 bus tokens per month. Limited to 5 trips (uses one token each way).
- God’s Love used to provide taxi vouchers, but they have become too expensive. Example, \$100 to Butte, because of the absence of intercity bus service and \$20 per person to go to Walmart. Majority of God’s Love clients are not originally from Helena, so they are unfamiliar with the system and layout upon arrival.
- St. Peter’s uses Medicaid to pay for transportation for eligible clients. Federal requirements are to use the cheapest form of transportation. Fixed route transit if available, then curb-to-curb, then mileage voucher, then taxi. Because of loop routes, fixed route can take a long time for people just finishing dialysis or cancer treatments. Other funds are often tapped for transporting people who don’t qualify for Medicaid transportation.
- Other organizations use Medicaid, other federal funds, and non-federal funds to pay for bus passes, provide mileage reimbursements, or provide taxi vouchers.

Public Participation

The project’s focus on inclusive planning generated many comments, often expressing strong opinions about public participation and whether people with mobility limitations have adequate access and a strong enough voice in the process.

Current situation

- One participant wrote a letter to Mayor Smith about the bus service (or lack thereof). Tired of voicing his opinion and no follow through by the City to improve service.
- “Currently it’s just the minimum, and it’s not enough.”
- One participant expressed frustration that City Commission meetings to consider the HATS TDP were held in the evening when it was difficult for them to find transportation to attend.

Comments and ideas for improving public participation

- Good times for meetings – Most feel the best times for meetings are afternoons, during transit hours, although one person said “if you want more people to come to meetings then hold them at different hours, like after work”. Good place: come to established meetings.
- All Our Place attendees would participate in the Greater Helena Transportation Plan if informed and transit is provided.
- Participation in consumer surveys: stamped envelopes, survey while on the bus, will participate if the survey is personally relevant to their personal concerns, brevity is best without compromising relevant data.
- Our Place participants would like the HTAC and NMTAC meeting schedules.

- Anyone can join the HTAC. Need better communication/marketing about the TAC and how to be involved.
- Many are interested in a coalition. Some don't want a new meeting to attend, and suggested than an alternative would be to add transit as an agenda item for the Helena Resource Advocates meeting through RMDC. Lots of support for this from the HRA participants.
- Other ideas
 - Advertise on TV or radio (would be less expensive than T.V.), have a call-in feature at meetings. Get the word out through nontraditional channels.
 - Hold an event to bring more community involvement around the bus system.
 - Butte is completing a bus art project. Artists submit design for bus wrap and community votes on design. Supports community art and achieves buy in from those formerly disinterested in transit.
 - Elected officials could ride the fixed route to observe the limitations and examine ridership. They also can walk to the service. Malfunction junction" and the roundabout was mentioned as a good place to start.

Funding

Stakeholders and consumers identified funding as a central issue that needs to be addressed.

- Bozeman vs. Helena discussion: Bozeman utilizing funding sources that Helena doesn't. Non-municipal entities paying in such as university and the hospital. Helena has higher costs due in part to better driver wages.
- The system needs more funding and "not by stealing from the poor and giving to the rich." The funding issue has to be addressed.
- Voucher systems and/or better coordination with the Medicaid transportation funding are sometimes useful and work well.
- Additional funding sources should be pursued
- Eugene, Oregon pooled all human service and transit resources and everyone uses a unified system (fully inclusive). Oregon and Washington statewide excel at coordinated transportation and non-emergency medical transportation.
- Most felt the community should pursue additional funding sources.
 - Many suggested increased local tax funding, usually through an Urban Transportation District
 - A few suggested pursuing grants
 - Almost all felt HATS should approach local partners for funding.