

Five Year Transit Development Plan Update 2013-2018

Prepared for:



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Prepared by



with

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Acknowledgements

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Table of Contents

Acknowledgements.....	i
Table of Contents.....	ii
Tables and Figures	iv
Definitions and Acronyms	vi
Executive Summary.....	1
HATS Current Services	1
Successes, Challenges, & Opportunities.....	3
Challenges.....	5
Opportunity to evolve into a community service.....	8
Implementation Plan	8
1 Introduction	1-1
1.1 The Role of Public Transportation.....	1-1
1.2 Helena Area Transit Service	1-3
1.3 HATS Success, Challenges and Opportunities	1-4
2 Community Characteristics	2-1
2.1 Using Census Data	2-1
2.2 Helena Micropolitan Area and Urban Clusters	2-6
2.3 Transit-Dependent Population Characteristics	2-6
2.4 Employment and Economy	2-8
3 Community Planning	3-1
3.1 Planning Partners	3-1
3.2 Plans	3-3
4 HATS Existing Services	4-1
4.1 Service Description.....	4-2
4.2 Fares	4-6
4.3 Infrastructure	4-6
4.4 Capital Equipment.....	4-9
4.5 Cost Allocation Model.....	4-9
5 System Performance.....	5-1
5.1 Quality of Service.....	5-1
5.2 Peer Comparison	5-5
5.3 Cost and Benefits of Helena Transit	5-12
6 Other Providers	6-1
6.1 Human Service Transportation Providers	6-1
6.2 Intercity Bus.....	6-1

6.3	Other Modes	6-2
7	Public & Stakeholder Perspectives	7-1
7.1	Key Stakeholder Interviews	7-2
7.2	Rider Survey.....	7-2
7.3	Community Survey	7-17
7.4	Stakeholder Roundtable.....	7-33
7.5	Driver and Dispatcher Interviews.....	7-33
7.6	Public Open House	7-35
7.7	Key Responses and Themes	7-35
8	Coordination	8-1
8.1	Coordination & Mobility Management	8-1
8.2	Coordinated Service Planning	8-7
9	Marketing and Technology.....	9-1
9.1	A Marketing Framework.....	9-1
9.2	Assessment of HATS Marketing	9-2
9.3	ITS & Website	9-3
10	Funding Needs and Alternatives.....	10-1
10.1	FTA Funding	10-2
10.2	Changes to Federal Funding Under MAP-21	10-3
10.3	Funding Opportunities & Alternatives	10-5
10.4	Developing a Contract for Services: Fare for a ride vs. Contract for Services.....	10-8
11	Goals, Objectives and Implementation Actions.....	11-1
11.1	Summary	11-1
11.2	Implementation.....	11-4
11.3	One-Year Actions.....	11-6
11.4	Five-Year Actions.....	11-18
12	Bibliography	12-1
	Appendix A: Exiting Bus Schedules	A-1
	Appendix B: Stakeholders Interview Notes	B-1
	Appendix C: Surveys.....	C-1
	Appendix D: Maintenance & Operations Review & Assessment	D-1
	Appendix E: Contracted service samples	E-1
	Appendix F: Comments and Changes from the Draft Report	F-1

Tables and Figures

Table 1-1: HATS FY 2012 Services	1-4
Table 1-3: Fixed Route and curb-to-curb passengers per hour (FY 2010)	1-6
Table 1-4: HATS Costs by Route for Daily Services (FY 2012)	1-6
Table 2-1: 2011 American Community Survey, Population Characteristics, City of Helena	2-7
Table 2-2: American Community Survey 2011, Economic Characteristics – City of Helena	2-8
Table 2-3: Top 20 Private Employers in Lewis and Clark County	2-9
Table 4-1: HATS and HATS-Partner Transportation Services	4-1
Table 4-2: Partners on Current Services	4-2
Table 4-3: HATS Fare Structure	4-6
Table 5-1: Fixed-Route Service Area Coverage LOS and HATS Target	5-2
Table 5-2: Fixed-Route Hours of Service LOS and HATS Target	5-2
Table 5-3: Response Time LOS and HATS Target for Demand Response	5-3
Table 5-4: Fixed-Route On-Time Performance LOS	5-4
Table 5-5: Demand Response On-Time Performance LOS	5-5
Table 5-6: Demand Response Trips Not Served LOS.....	5-5
Table 5-7: Annual reported ridership	5-8
Table 5-8: FY 2012 Cost Performance Measures	5-12
Table 5-9: Description of potential benefits for quality transit	5-14
Table 7-1: Rider estimates of number of trips per week	7-9
Table 7-2: Summary of rider survey comments.....	7-16
Table 9-1: ITS User Services for Transit and Coordination.....	9-4
Table 9-2: HATS Website Assessment.....	9-10
Table 11-1: Implementation Actions	11-4
Table 11-2: Option A Service Changes - Rough Timetable for Select Stops	11-9
Table 11-3: Cost Estimates for New Services.....	11-11
Table 11-4: Proposed Rate Structure.....	11-12
Figure 2-1: Helena valley census tracts and block groups.	2-4
Figure 2-2: Population density map with HATS routes, stops, and east valley service area.	2-5
Figure 4-1: Regional view of routes, stops, and service area	4-4
Figure 4-2: Existing Checkpoint Route	4-5
Figure 4-3: Example of a stop with schedule and simple seating.	4-8
Figure 4-4: Cost allocation methodology for public transportation.....	4-10
Figure 4-5: HATS Costs by category	4-11
Figure 5-1: Early, on-time, and late arrivals from 11 days in October.....	5-4
Figure 5-2: Peer comparison of amount of fixed route service	5-6
Figure 5-3: Peer comparison of operating budgets	5-7
Figure 5-4: Ridership over time.....	5-8
Figure 5-5: Ridership by month for FY 2012	5-9

Figure 5-6: Ridership by route, calendar year 2010.....5-9

Figure 5-7: Miles by route, calendar year 20105-10

Figure 5-8: Boardings by Hour of Day5-10

Figure 5-9: Passenger Boardings - Checkpoint.....5-11

Figure 7-1: Survey Responses by Route7-3

Figure 7-2: Gender of riders.....7-3

Figure 7-3: Age of riders.....7-4

Figure 7-4: Reason for riding HATS7-5

Figure 7-5: How riders would make their trip if HATS were not available7-6

Figure 7-6: Trip Purpose.....7-7

Figure 7-7: Employment Status.....7-8

Figure 7-8: How riders accessed schedule information.....7-10

Figure 7-9: How Riders accessed the bus7-11

Figure 7-10: Travel time to access the bus7-12

Figure 7-11: Distribution of rider travel times from Bozeman Streamline on-board survey, 2012.....7-13

Figure 7-12: Rider level of satisfaction.7-14

Figure 7-13: Numbers of riders and non-riders who completed the survey7-17

Figure 7-14: Riders/non-riders in household.....7-18

Figure 7-15: Gender of respondents.....7-19

Figure 7-16: Age of respondents.....7-19

Figure 7-17: Household income7-20

Figure 7-18: Respondents with a disability7-21

Figure 7-19: Factors affecting ridership (1).....7-23

Figure 7-20: Factors affecting ridership (2).....7-24

Figure 7-21: Influence of gas price.....7-25

Figure 7-22: Most likely purpose for using HATS7-27

Figure 7-23: Communication preferences7-29

Figure 7-24: Use of cell phones.....7-30

Figure 7-25: Internet use.....7-30

Figure 7-26: Rating the value of transit7-32

Figure 8-1: The Complexity of Transportation Funding8-2

Figure 8-2: Mobility Management Concepts8-4

Figure 9-1: Diagram of technology uses.9-5

Figure 9-2: Sample Timetable from Flagstaff.....9-13

Figure 10-1: Approximate Distribution of Revenue (excludes Trolley, Intercity, Head Start and Rocky Mountain service)10-1

Figure 11-1: Proposed new service adds one bus to fixed route service, expands the coverage area, and should improve on-time performance.....11-8

Figure 11-2: Option B Proposed Routes.....11-10

Figure 11-3: N. Montana Ave. and many other commercial corridors are currently designed to accommodate bus stops within the lane of travel. (image source: Google Streetview).....11-14

Definitions and Acronyms

ADA	Americans with Disabilities Act of 1990. Landmark federal civil rights legislation that requires public transit systems to make their services fully accessible to persons with disabilities, as well as to underwrite a parallel network of paratransit service for those who are unable to use the regular transit system. In general, paratransit service must be provided within 3/4 of a mile of a bus route or rail station, at the same hours and days, for no more than twice the regular fixed route fare. The ADA further requires that paratransit rides be provided to all eligible riders if requested any time the previous day, within an hour of the requested time.
ADA paratransit eligibility	Eligibility for paratransit service is based on inability to travel to a bus or train, even if accessible, because of a disability. Eligibility can be situational, such as an inability to access a bus or train because of environmental or architectural barriers not under the control of the transit agency.
Choice rider	A rider who chooses transit over driving
Curb-to-curb	Demand response service where the rider meets the vehicle at the curb. This is more common than door-to-door service where the driver can assist the rider to the door.
HATS	Helena Area Transit Service
Demand response	Another term for paratransit service, and a more general term than curb-to-curb, door-to-door, or specialized transportation. Sometimes used as an umbrella term to include services not required by ADA, such as services for seniors and general public demand response service in low density areas.
Fixed route	Public transit service provided on a repetitive, fixed-schedule basis along a specific route, with vehicles stopping to pick up passengers at and deliver them to specific locations. This typically is used in reference to local transit service but can be applied to intercity and commuter bus and rail.
Deviated fixed route	Service that allows on-request, limited-distance deviation (usually up to ¼ of a mile) off a regular bus route for those who experience difficulty getting to bus stops. Also known as flex route. Deviated fixed routes can be used to meet ADA requirements without paratransit in low-demand areas.
Mobility management	A systems approach to manage transportation resources that involves creating partnerships with transportation providers in a community or region to enhance travel options, and then developing means to effectively communicate those options to the public

ADA	Americans with Disabilities Act of 1990. Landmark federal civil rights legislation that requires public transit systems to make their services fully accessible to persons with disabilities, as well as to underwrite a parallel network of paratransit service for those who are unable to use the regular transit system. In general, paratransit service must be provided within 3/4 of a mile of a bus route or rail station, at the same hours and days, for no more than twice the regular fixed route fare. The ADA further requires that paratransit rides be provided to all eligible riders if requested any time the previous day, within an hour of the requested time.
Operating expenses	Expenses associated with the operation of the transit agency. This excludes capital expenses for items with a useful life more than one year and with a capitalization level greater than \$5,000. Operating expenses in this TDP encompasses operating, administrative, and maintenance line items in FTA reports. Standard practice uses operating expenses and excludes capital expenses for performance measures.
Paratransit	Flexible passenger transportation that does not follow fixed routes or schedules, including shared taxis and services provided by public transit operators. Within the public transportation profession the term usually refers to transportation service required by ADA for individuals with disabilities who are unable to use fixed-route, public transit systems.
Public paratransit	Terminology used in Medicaid literature to differentiate service provided by public transportation from shared taxis and other private sector or non-profit paratransit services. Service may be open to people who are not ADA eligible, especially in low density areas and for service targeted towards seniors.
RMDC	Rocky Mountain Development Center
Transportation disadvantaged	People who cannot drive due to a disability, age, or income

Executive Summary

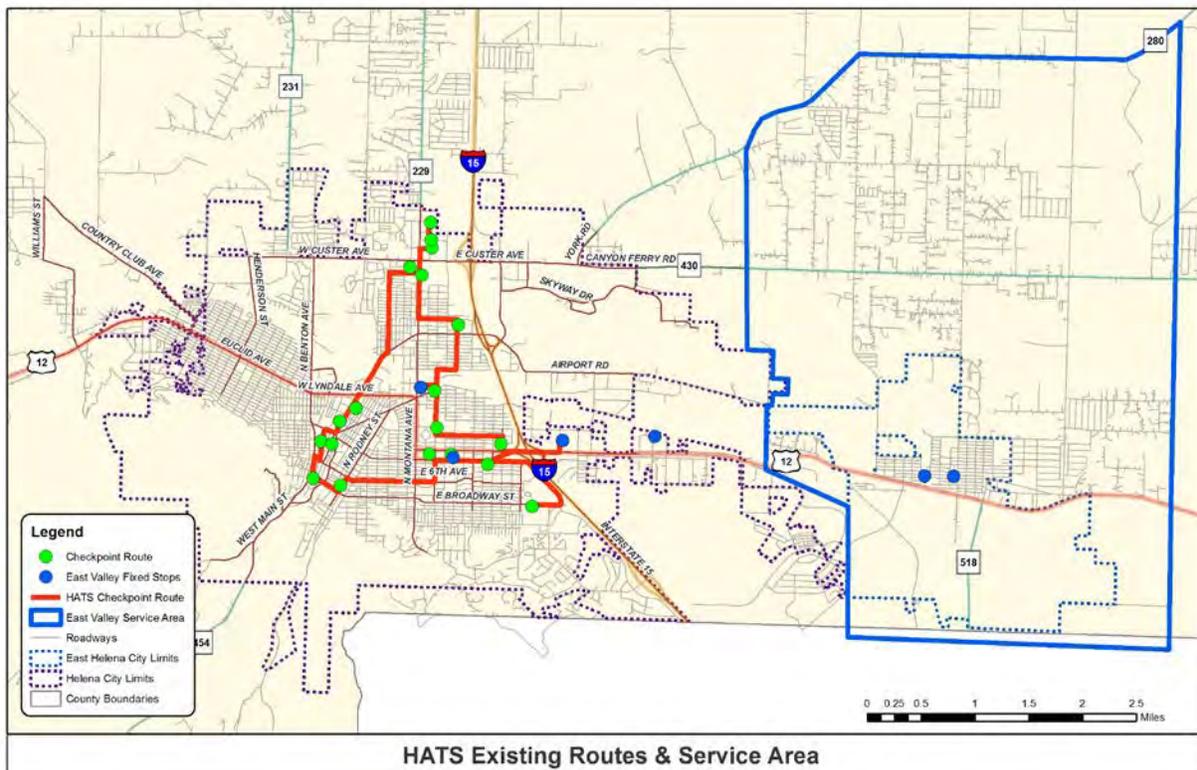
HATS Current Services

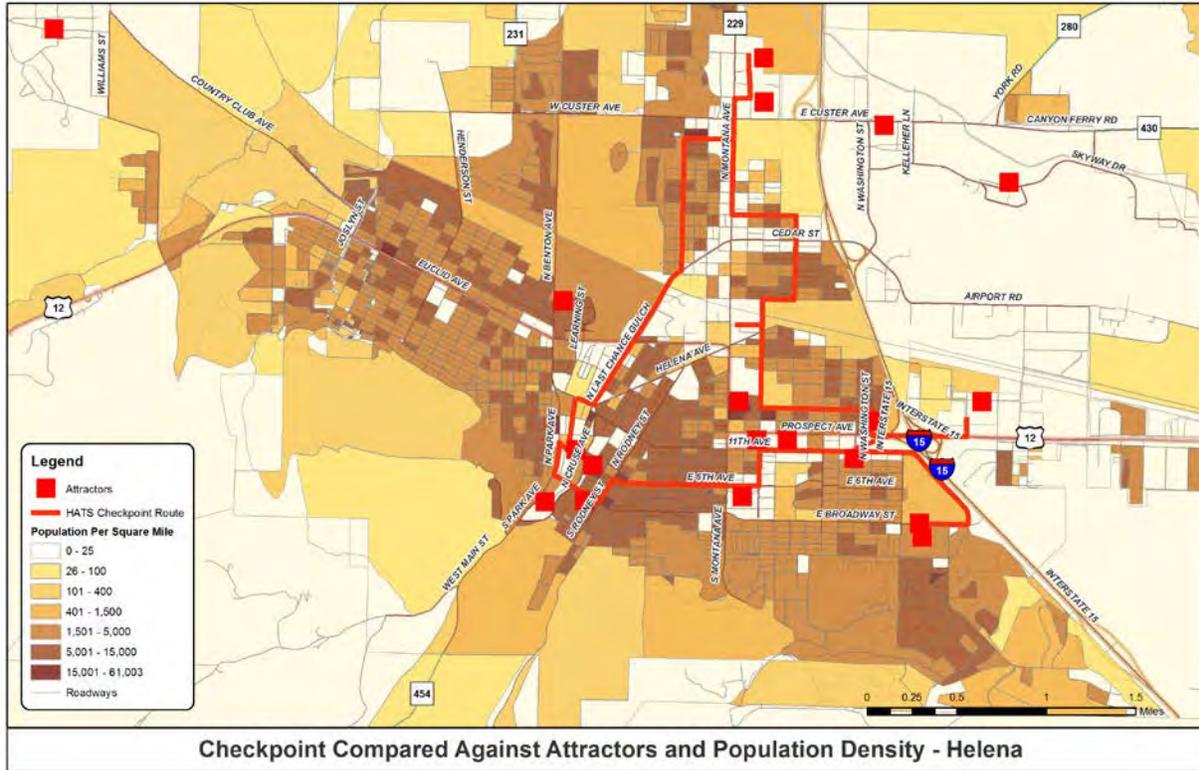
Helena Area Transit Service (HATS), a program of the City of Helena, offers general public curb-to-curb service, one checkpoint (fixed) route in town, and the East Valley route, which is a deviated fixed route. HATS started with its curb-to-curb service, adding the other service within the last ten years.

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.

Fiscal Year 2012 Services

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





As the Montana Department of Transportation (MDT) designated lead agency for the region, HATS serves as the applicant and responsible party for Federal Transit Administration (FTA) funds. In addition to its weekday service, HATS partners with other organizations to provide a variety of transportation options.

The curb-to-curb service became a focus of this study because of its high cost and its generous policies. Under HATS current policies, rides are provided to anyone who calls and makes a reservation by 4pm the previous day. In contrast, most peer communities limit curb-to-curb service to passengers who meet Americans with Disabilities Act (ADA) requirements, under which paratransit service must be provided within ¼ mile of fixed routes for people who cannot access fixed route service.

In total ridership, Helena ranks second among similar rural operators in Montana, while Helena’s rides per mile rank fourth. Thirty-two percent of Helena’s ridership is on its Checkpoint fixed route while only 17% of the miles are on this route.

Successes, Challenges, & Opportunities

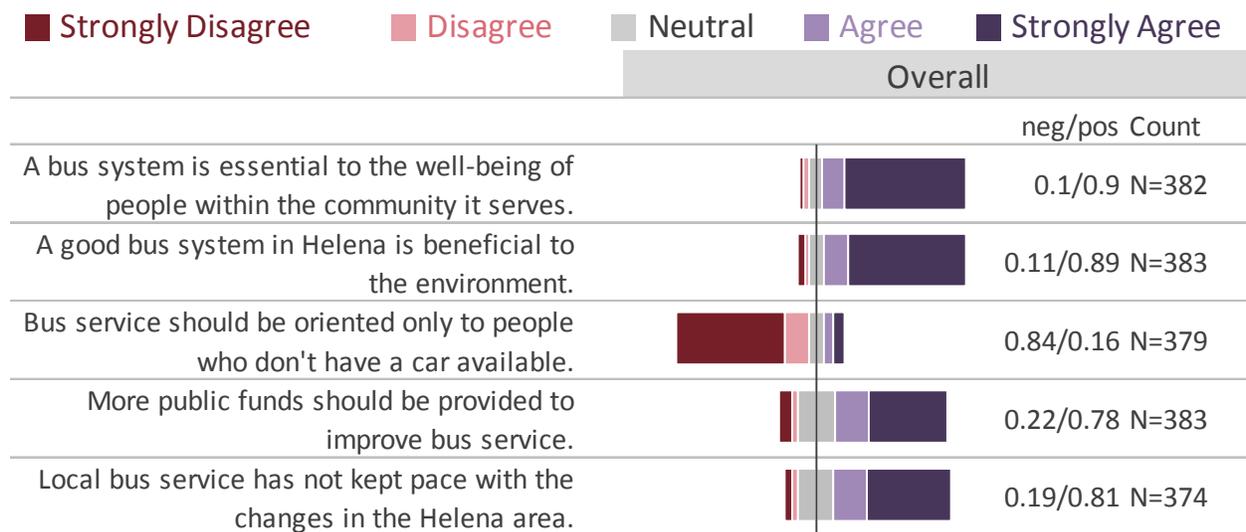
The following table summarizes the most significant issues and themes that emerged from this TDP update.

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

Success: highly valued safety net

HATS services are achieving important benefits for transportation disadvantaged populations and are highly valued by current riders, a large percentage of whom have few other transportation options. When riders were surveyed about how they would make their trip if HATS were not available, overall only a small percentage would drive a personal vehicle (5%). A significant percentage had no other option and would not be able to make the trip (27%). By far the highest percentages would walk (41%) or ride with a friend or family member (32%). These answers illustrate that currently HATS is primarily providing a “safety net” service for transportation disadvantaged populations.

The Value of Transit



The service enjoys strong community support. Overwhelming majorities of both riders and non-riders who completed the community survey strongly agreed that “a bus system is essential to the well-being of people in the community it serves” and that it is “beneficial to the environment.” Both groups also strongly supported more public funding to improve bus service and agreed that “local bus service has not kept pace with the changes in the Helena area.”

Success: Important community benefits

Public transportation can benefit the Helena area in multiple ways. The economic vitality of communities such as Helena can benefit greatly from improving connectivity for all residents to achieve goals including:

- Strengthening the economy by improving access to jobs.
- Helping to support and improve the vitality of the downtown area.
- Facilitating independent living for seniors and people with disabilities by providing more options to access health care, social services, shopping, and educational opportunities.

Bus service is also an essential component of multi-modal transportation networks which provide significant healthy living and environmental benefits to air quality, energy use, carbon emissions, view sheds, water quality and wildlife corridors. At the community level and beyond a well-designed, well-integrated system that includes transit, bicycle and pedestrian facilities can greatly improve quality of life, increase property values and attract new businesses and investments.

Some of the community benefits of transit are much easier to quantify than others. A Wisconsin DOT study (HDR/ HLB Decision Economics, 2006) calculated values for the socio-economic benefits of different types of trips. Originally calculated in

2002 dollars, we adjusted the model to 2012 dollars per the Consumer Price Index (CPI). Applying these values to HATS ridership and trip purposes, we have conservatively estimated that HATS weekday services provide at least \$1.4 million of socio-economic benefits to the Helena area. The actual value is much higher because of benefits that are difficult to quantify and are not captured in the Wisconsin model such as quality of life factors.

Quantified benefit per ride to government, business, rider (2012 dollars)	
Work:	\$8.98
Service (shopping, recreation):	\$8.02
Education:	\$5.16
Medical:	\$23.71
HATS 2012 \$1.4 million socio-economic benefit	
Plus non-quantified benefits	
<small>Benefits calculated with model developed for Wisconsin DOT, 2002 dollars adjusted per Consumer Price Index, using data for HATS 2012 ridership and ride categories from on-board survey</small>	

Success: New transit center and a willingness to try new things

HATS is operating out of a new transit center which provides good space for customers, administration, and maintenance. This facility provides a high quality base for HATS future growth, elevates HATS visibility in the community, and sends a positive message projecting stability, professionalism and the sense that HATS is an important community institution.

HATS and the Transportation Advisory Committee have shown a pattern of trying new things to meet community needs. For example a Capital Commuter, which ran in 2009 and 2010 before funding was cut

from the state budget, was widely praised in our surveys and public outreach as an example of service stakeholders would like to see.

Challenges

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

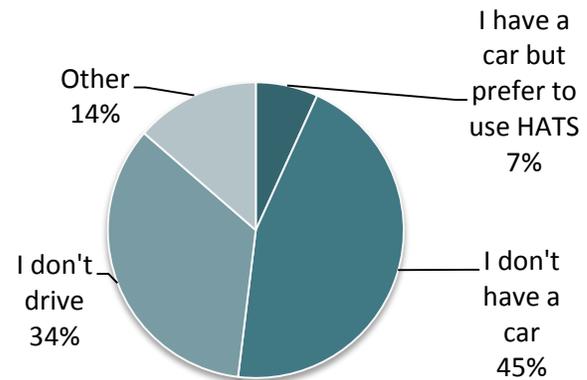
The results of our rider survey show that 92% of current riders do not own a car and/or cannot drive. This low level of use by commuters and other "choice riders" is a reflection of the lack of convenient fixed route service, poor on-time performance, long travel times and limited marketing.

Lack of Funding Diversity

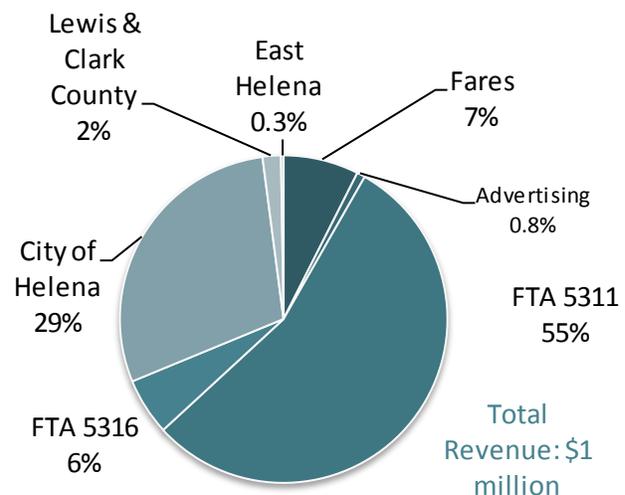
The lack of diversity in HATS local funding is a significant challenge. The City of Helena is by far the largest local contributor, with contributions from the City of East Helena, Lewis & Clark County, and human service agencies less than the local portion of the East Valley route costs. In Montana, 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.

Automobile Access

What is your primary reason for using HATS?



Operations Funding for HATS Weekday Service* Fiscal Year 2012



*Checkpoint, Curb-to-Curb, East Valley

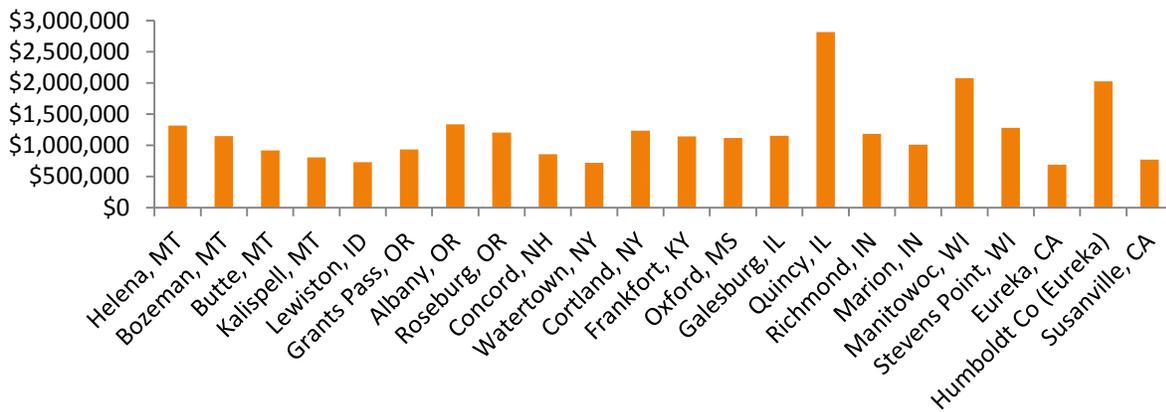
High Cost per Ride and Low Rides per Hour

As shown in the following 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 as well.

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%

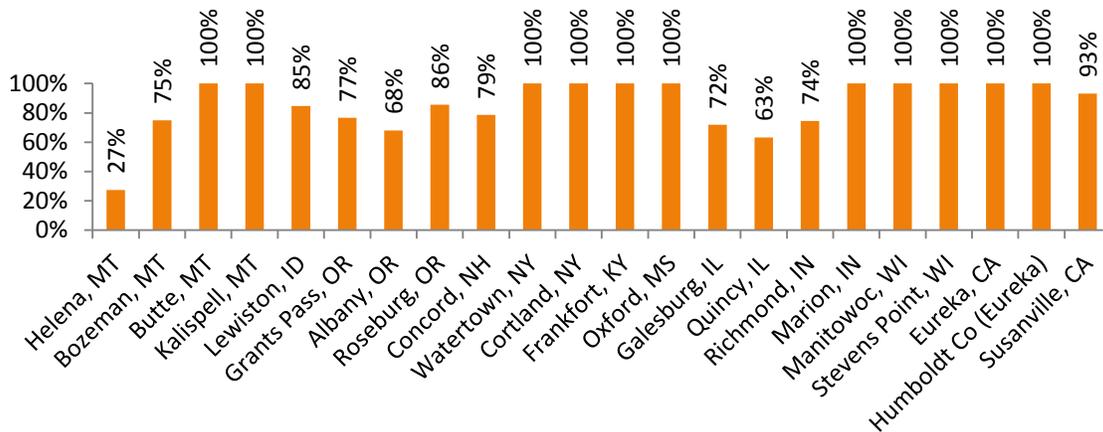
Annual Operating Budget (2010)

Helena's budget is adequate to provide services comparable to Bozeman and Butte. Many top performing rural systems have much larger budgets than shown in this group.



Percent Miles in Fixed or Flex Route Service (2010)

Peers operate primarily fixed or flex route



Communities of approximately the same population and transit budget as Helena selected from the rural National Transit Database (NTD). Potential errors, omissions, and explanation of differences: communities of similar size with much larger budgets, such as Port Washington with a \$7.9 million budget, were filtered out of these graphs. California counties often operate countywide service in addition to city services, such as peer Humboldt County, where Eureka and Arcata have city services and Humboldt Transit Authority operates county wide. Many communities meet ADA requirements through use of flex routes; some contract ADA paratransit; some may have misreported.

On-Time Performance

HATS fixed route and deviated route services perform poorly¹ in the area of on-time performance:

- 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

This occurs 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. A related issue is that many riders surveyed indicated that travel times on the fixed route bus are too long to meet their needs. The East Valley Bus, with its expansive service area, performs far worse than the in-town Checkpoint route.

On Time Performance (October 2012 Sample)

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

		Checkpoint	East Valley
Early	11 min +	0%	2%
	6-10 min	1%	10%
	1-5 min	15%	18%
	On Time 0 -5 min	49%	35%
Late	6-10 min	18%	17%
	11-15 min	11%	8%
	16 +	6%	10%

Limited availability

To achieve a target LOS D, HATS should have a goal of providing fixed route service within one-quarter of a mile of 60-69% of the service area population. Currently, 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.

No west side service

- 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

- Target LOS D: 12-13 hours of service
- Actual LOS E: 11 hours for Checkpoint and 8 hours for East Valley
- No weekend service

¹ Based on levels of service published in the Transit Capacity and Quality of Service Manual (Kittelson & Associates et.al., 2003)

Marketing and Bus Stops

The responses to our 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. HATS has many tools at their disposal 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 as 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.

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.

Helena Five Year Transit Development Plan Update

We have identified one-year and five-year actions in six categories that will help HATS achieve its 2020 vision and goals.

#	Action	Timeline	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
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

#	Action	Timeline	Page Number
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 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.

Our public outreach (Chapter 7 and Appendix B) and our system analysis (Chapter 3) strongly support additional fixed routes in general, and specifically for the west side of Helena. The team has developed two alternatives for route concepts. Option A can operate with 3 buses and consists primarily of linear routes. Option B can operate with 3 buses or 4. Because it uses loop routes a larger percent of the population would have access to bus service – meeting the 65% target. The tradeoff is that the Option B loop route would have longer travel times, reducing attractiveness to commuters. If funding permits, this can be mitigated by putting a second bus on a loop route, traveling in the opposite direction.

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.

An updated fare structure is an important element of the transition to expanded fixed route service. The goal is to encourage use of fixed route instead of curb-to-curb. HATS fare structure has not been updated for at least 10 years. To manage costs, HATS can strictly limit curb-to-curb services to ADA-qualified riders, or as an alternative HATS can keep this service open to the general public with a premium rate. The curb-to-curb fare structure must follow the ADA requirement that ADA-qualified riders pay no more than twice the adult fixed route fare. We propose setting the general public curb to curb premium rate at twice the ADA rate.

Cost Estimates for New Services in Years 2-5

Annual Fixed Route Operating Costs

Design Parameter	Value*
12 hours per day, weekdays	
1 bus	\$221,000
3 buses	\$664,000
4 buses	\$885,000
Saturday (12 hours)	
1 bus	\$45,000
3 buses	\$135,000
4 buses	\$180,000

Additional hour, weekdays

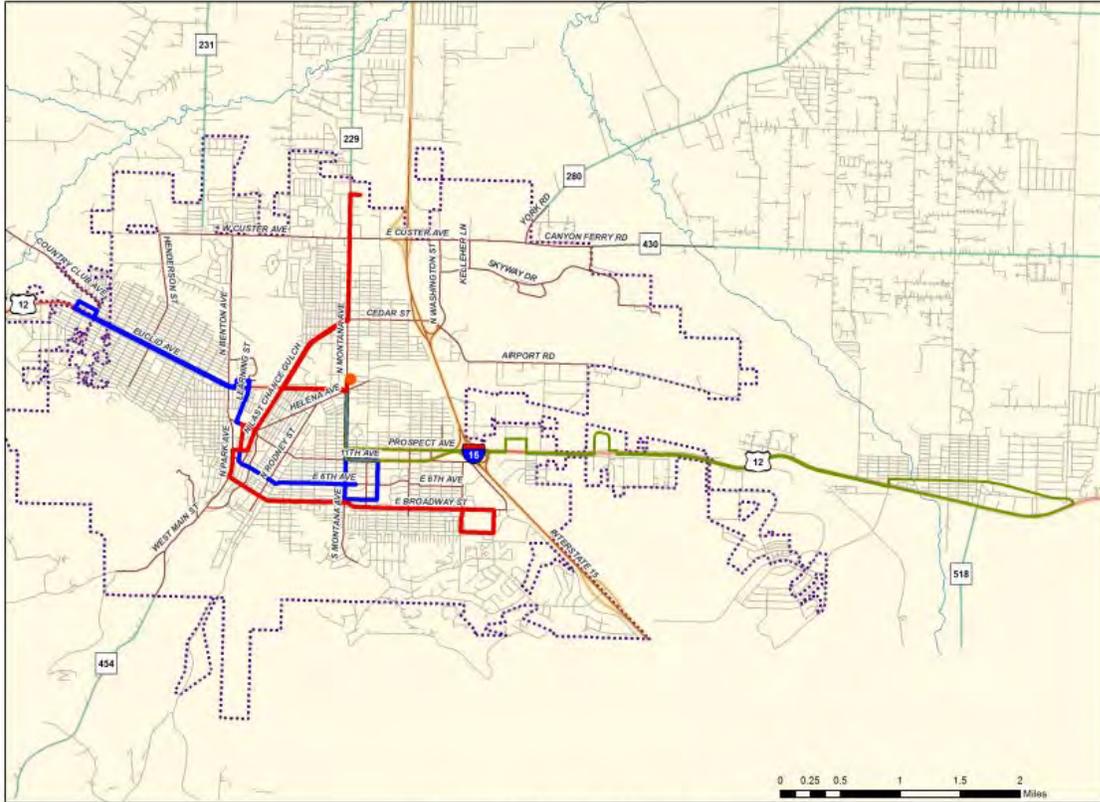
Design Parameter	Value*
1 bus	\$18,000
3 buses	\$55,000
4 buses	\$74,000

* Mathematical variation due to rounding

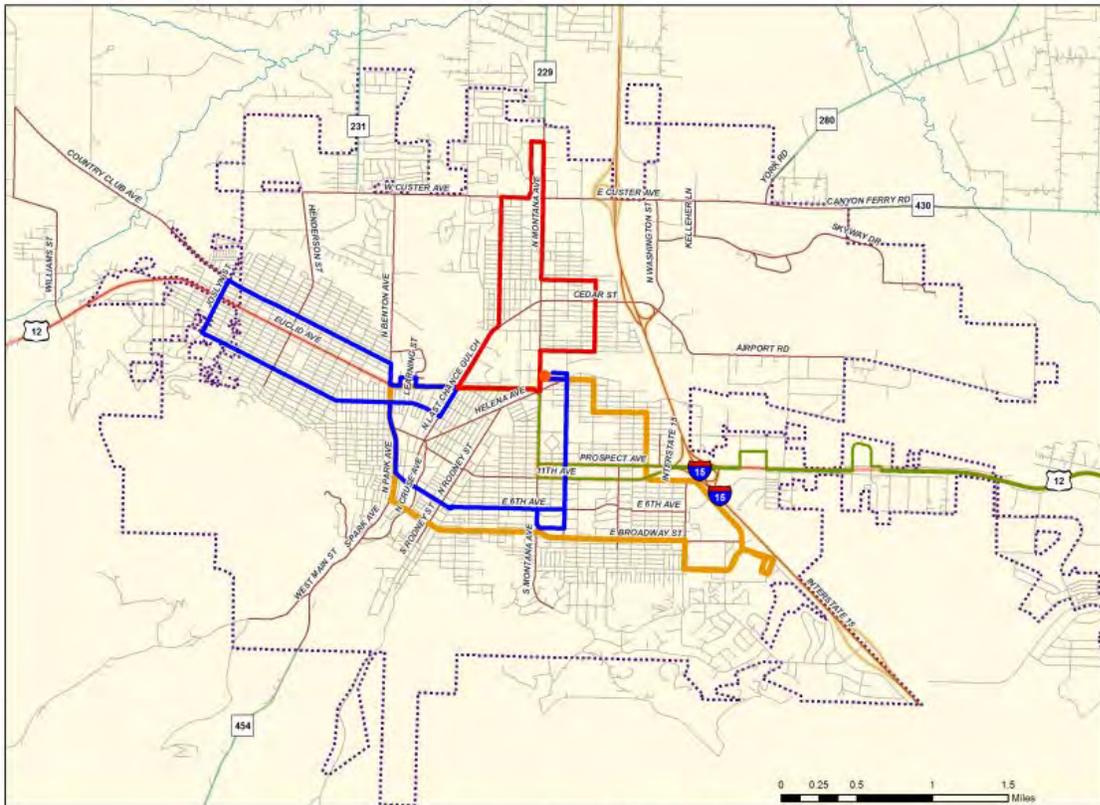
Example Rate Structure

	Fixed Route			Curb to Curb	
	Adult	Student	Senior/ disabled	ADA Eligible	Premium
<i>multiplier</i>	1	0.85	0.85	2	4
Zone A: In-town					
One ride (w/ transfer)	\$1.00	\$0.85	\$0.85	\$2.00	\$4.00
15 rides-10% savings	\$13.50	\$11.00	\$11.00	\$27.00	\$54.00
Unlimited monthly pass	\$32.00	\$27.00	\$27.00	\$64.00	\$128.00
Zone B: East Helena city limits					
One ride (w/ transfer)	\$1.50	\$1.30	\$1.30	\$3.00	\$6.00
15 rides-10% savings	\$20.00	\$17.00	\$17.00	\$40.00	\$80.00
Unlimited monthly pass	\$32.00	\$27.00	\$27.00	\$64.00	\$128.00
Zone C: Unincorporated East Valley					
One ride (w/ transfer)	\$1.75	\$1.50	\$1.50	\$3.50	\$7.00
15 rides-10% savings	\$24.00	\$20.00	\$20.00	\$48.00	\$96.00
Unlimited monthly pass	\$56.00	\$48.00	\$48.00	\$112.00	\$224.00
Fort Harrison					
One ride (w/ transfer)					\$3.00
15 rides-10% savings					\$40.00
Unlimited monthly pass					\$64.00

Children 6 and under ride free. Rates and multipliers could be adjusted higher or lower depending on policy decision, except by law the ADA-eligible paratransit fare cannot exceed twice the fixed route fare.



Proposed Routes Option A



Proposed Routes Option B

1 Introduction

The purpose of this Transportation Development Plan (TDP) is to create a document that will guide the direction of the City of Helena’s transportation program, the Helena Area Transportation Service (HATS). It assesses the current situation, identifies short and long-term goals, and provides a context for business decisions to be measured.

HATS management, the Transportation Advisory Committee (TAC) and the City Commission will use this document to identify opportunities for improving both internal and public elements of HATS operations. The people responsible for financial management will use the data and goals in this plan to evaluate fiscal reports, set budgets, and prioritize expenditures under the guidance of management. Finally, this document will support HATS’ requests for operating assistance from MDT, as well as helping other potential funding partners understand HATS’ value to the community. The projections contained in this plan should be updated as changes are made, when new data becomes available, and when new issues and opportunities arise.

The goals, objectives and implementation alternatives proposed in this TDP reflect the primary issues and opportunities for improvement identified through the needs assessment process. The document:

- Establishes the community’s existing conditions in terms of demographic trends, growth patterns, and current services and needs.
- Identifies organizational, management, and administrative alternatives
- Outlines service improvement options
- Develops goals, objectives, and performance measures
- Develops service and implementation plans
- Estimates costs and revenues
- Defines system performance metrics
- Develops a strategy for modifying and updating the TDP

1.1 The Role of Public Transportation

“We cannot truly evaluate the value of community and public transportation if we never take into account the positive economic outcomes it engenders. Looking beyond mere ridership statistics, this value is rooted in data that is far more challenging to collect and interpret than traditional transit measurements.” – Scott Bogren, in “Reframing Value – Transit’s New Playbook”

Serving the Entire Community

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.

To successfully mature into this broader role, a transit service needs to invest in providing convenient fixed route service for commuters and other populations who have the option to drive personal vehicles, but who will choose to use transit if it is reliable and provides a positive experience that meets their transportation needs. Throughout the industry, the term “choice riders” is used to describe these target populations who use transit services by choice rather than out of necessity. As it evolves from a safety net service into a community service, a public transportation provider needs to invest in effective marketing strategies to attract choice riders.

Through this maturing process, a transit service will ideally achieve the goal of providing significant economic benefit to employers, employees and commercial areas. By maximizing ridership it should also achieve meaningful reductions in traffic congestion and carbon footprint. To do this, a service must:

1. Be affordable.
2. Have a mix of services with routes and schedules that are designed using good data and stakeholder input to effectively serve a broad range of community needs.

To achieve these goals, public transit providers in communities of all sizes are moving away from a narrow focus on just running buses and are transitioning to a focus on helping people get where they need to go. They are thinking more like a business. They are also embracing public transportation’s potential role in community building. This means a strong emphasis on marketing and an organizational structure that incorporates three key elements: management that focuses on running the organization efficiently on a day to day basis; technicians who do the actual work of the organization; and entrepreneurs who plan and build the partnerships needed to meet the needs of the future.

To meet these challenges, management will need to be creative and engage the community to improve services, find new resources, and ensure that opportunities are not missed.

Transportation as an Essential Element of Livable Communities

The federal Sustainable Communities Partnership describes the role of transportation as an integral element of a “livable” community. The Sustainable Communities Partnership describes a livable community as one that:

- Provides more transportation choices that are safe, reliable, and economical
- Promotes equitable, affordable housing options
- Enhances economic competitiveness
- Supports and targets funding toward existing communities
- Values communities and neighborhoods

USDOT recommends the following to improve the transportation in a livable community:

- **Provide more transportation choices** to decrease household transportation costs, reduce our dependence on oil, improve air quality and promote public health.
- **Expand location and energy-efficient housing choices** for people of all ages, incomes, races and ethnicities to increase mobility and lower the combined cost of housing and transportation.
- **Improve economic competitiveness of neighborhoods** by giving people reliable access to employment centers, educational opportunities, services and other basic needs.
- **Target federal funding toward existing communities** – through transit-oriented development and land recycling – to revitalize communities, reduce public works costs, and safeguard rural landscapes.
- **Align federal policies and funding** to remove barriers to collaboration, leverage funding and increase the effectiveness of programs to plan for future growth.
- **Enhance the unique characteristics of all communities** by investing in healthy, safe and walkable neighborhoods, whether rural, urban or suburban.

1.2 Helena Area Transit Service

Helena Area Transit Service (HATS), a program of the City of Helena, has served the community as a public transportation bus system since 1979. Today HATS offers general public curb-to-curb service, one check-point (fixed) route in town, and the East Helena route. Service runs Monday to Friday, 7am to 6pm, except holidays. The entire fleet is equipped with wheel chair lifts and 2-way radios, all vehicles meet ADA regulations. HATS operates out of a new transit center, opened in 2011, which also serves as Helena’s intercity bus station. For Fiscal Year 2012, based on operating costs reported to the Montana Department of Transportation and the Federal Transit Administration, HATS had an operating budget of \$976,488¹ for its daily service.

In addition, as the MDT-designated lead agency, HATS partners with other organizations to provide transportation options and serves as the applicant and responsible party for FTA funds. HATS and the City partner with Rocky Mountain Development Council for senior transportation and Head Start transportation. HATS also serves as the ticket agent for intercity bus service. The City budget shows \$292,772 in expenditures for these services.

HATS is one of 34 general public transportation systems in Montana.

Table 1-1 shows that HATS provided 107,448 rides in FY 2012, including fixed route, paratransit, and all coordinated services. In total ridership, Helena ranks second among similar rural operators in Montana, while Helena’s rides per mile rank fourth in Montana. Thirty-two percent of Helena’s ridership is on its Checkpoint fixed route while only 18% of the miles are on this route.

¹ The City of Helena budget shows \$978,403, leaving \$1,915 in unreported costs.

Table 1-1: HATS FY 2012 Services

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

1.3 HATS Success, Challenges and Opportunities

This section presents a summary of the most significant issues and themes that emerged from this TDP update. The goals, objectives and implementation plan for addressing these issues are presented in Chapter 11.

Public transportation can benefit the Helena area in multiple ways. The economic vitality of communities such as Helena can benefit greatly from improving connectivity for all residents to achieve goals including:

- Strengthening the economy by improving access to jobs.
- Helping to support and improve the vitality of the downtown area.
- Facilitating independent living for seniors and people with disabilities by providing more options to access health care, social services, shopping, and educational opportunities.

Finally, bus service is an essential component of multi-modal transportation networks which provide significant healthy living and environmental benefits to air quality, energy use, carbon emissions, view sheds, water quality and wildlife corridors. At the community level and beyond a well-designed, well-integrated system that includes transit, bicycle and pedestrian facilities can greatly improve quality of life, increase property values and attract new businesses and investments. For example, a recent study of six Rocky Mountain communities found that homebuyers were willing to pay a premium, an average 18.5 percent, to live in walkable neighborhoods. Ninety percent of survey respondents in these communities said living within an easy walk of other places and attractions was an important factor in thinking about where they would like to live. ((Sonoran Institute, 2013).

Success

HATS is currently operating a successful “safety net” service as described in Section 1.1 above. HATS services are achieving important benefits for transportation disadvantaged populations and are highly valued by current riders, a large percentage of whom have few other transportation options.

HATS is operating out of a new transit center which provides good space for customers, administration, and maintenance. This facility provides a high quality base for HATS future growth, and sends a positive message to the community, projecting stability, professionalism and the sense that HATS is an important community institution.

HATS and the Transportation Advisory Committee have shown a pattern of trying new things and meeting community needs. For example a Capital Commuter, which ran in 2009 and 2010 before funding was cut from the state budget, is widely praised as an example of service stakeholders would like to see.

Challenges

Overall, there is a low level of use by commuters and other “choice riders” – populations who are not transportation disadvantaged. Both our system analysis and stakeholder input points to the need to improve on-time performance and serve the west side of Helena. There is also consensus around the need for better marketing and bus stops.

HATS funding is not as robust or stable as desired. There is no dedicated mill levy (or sales tax) at the local level. Instead, HATS depends primarily on City of Helena general fund. State investment in public transportation ranks in the bottom five in the country. This leaves HATS highly reliant on Federal Transit Administration, which receives funding from the Highway Trust Fund and the General Fund. While Federal funding for rural transit has historically grown over time, there is a potential risk that Congress will cut transit expenditures in the future.

Opportunities

A major focus of this planning project has been to explore the potential for HATS to take the next steps in the maturing process described in in Section 1.1 above, to evolve into a broader community service while maintaining the important safety net benefits that are currently being achieved.

Existing riders and the community at large have different perspectives on how to expand service. Existing riders want longer hours and Saturday service, and the community at large wants more commuter-oriented service. We recommend implementing policies that focus curb to curb service on people who need it, but reduce availability of this high-cost service for the general public. We believe this approach would make it possible to redirect budget resources to add a fixed route, which can operate at a much lower cost per ride. Fixed route service would be expanded and redesigned to improve on-time performance, cover the west side of Helena, and expand hours to match typical commute times. Funding and implementation decisions will dictate the ability to further expand hours, days of service, frequency, and coverage outside city limits.

As shown in the following two tables, HATS current focus on demand-response service results in a relatively low number of rides per hour and a high cost-per-ride.

Table 1-2: Fixed Route and curb-to-curb passengers per hour (FY 2010)

	Rides per hour	% fixed route hours
Helena	7	31%
Bozeman	14	66%
Butte	10	100% reported

Source: Rural National Transit Database (NTD), costs allocated between fixed route and demand response by hours.

Table 1-3: HATS Costs by Route for Daily Services (FY 2012)

	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%

Source: HATS financial and ridership data.

Calculations are based on ridership by route, miles per route, and service hours per route. Costs are assigned to the route based on the cost allocation model described in Section 4.5.

$2012 \text{ Operating Cost} = 1.45 \left(\$34.90 \times \# \text{ of Hours in Service} + \$1.16 \times \# \text{ of Miles in Service} \right)$
--

2 Community Characteristics

Helena is the state capital of Montana and the county seat of Lewis & Clark County. The 2010 census put the population at 28,180 and the Lewis and Clark County population at 63,395. Helena is the principal city of the Helena Micropolitan Statistical Area, which includes all of Lewis and Clark and Jefferson counties; its population is 74,801 according to the 2010 U.S. Census. The Federal Transit Administration classifies Helena as a rural community since it is outside of a metropolitan area with a population of at least 50,000.

Founded as a gold mining boom town in the 1860s, the denser street grids in the older part of town are well-suited to transit but with some irregularly sized blocks and different grids producing a number of challenges for service design. The areas of the city and the valley developed after 1960 are generally more difficult to serve by bus, with larger block sizes, many roads lacking sidewalks, and parking lots separating roads from the front doors of shops.

As the state capital, Helena has a long record of economic stability. Its status as capital makes it a major hub of activity at the county, state, and federal level, with 31 percent of the city's workforce made up of government jobs, and private sector jobs comprising 62 percent. The biannual legislative sessions between January and April generate a spike in population and economic activity while also creating a large increase in congestion and parking problems in some areas.

The city has two colleges, two high schools, and two middle schools:

- Carroll College, a Catholic liberal arts college which opened in 1909, enrolls 1,500 students.
- Helena College University of Montana, a two-year affiliate campus of The University of Montana, provides transfer and career and technical education for more than 1,600 students. It opened in 1939.
- Helena High School (1,674)
- Capital High School (1,416)
- C R Anderson Middle School (994)
- Helena Middle School (720)

2.1 Using Census Data

The US Census Bureau is the primary source of information about population numbers and social, economic, and housing characteristics. The decennial census provides basic information on 100 percent of the nation's population. Beginning with the 2010 census, the decennial survey of all persons is much shorter than in previous censuses. It provides information on numbers, sex, age, race, and limited information on households.

Additional detail for the decennial census used to be obtained through "long form" surveys sent to a sample of the total population at the same time as the shorter form for the entire population. The Census Bureau no longer obtains detailed information in this way. In 2005, the US Census Bureau initiated the American Community Survey, which provides detailed information with on-going surveys

sent to a random sample of the population. Data is released in one-year, three-year, or five-year cycles depending on population size. Communities with population of 60,000 or more have annual data; those with population of 20,000 or more have three-year cycle data, and all other units are on the five-year cycle. Helena and countywide data are on a three-year estimate cycle.¹

The census geographies relevant to Lewis and Clark County are blocks, block groups, census tracts, place, and county. Blocks are the smallest geographic census unit. In the urbanized areas, blocks are the same or similar to city blocks. Block groups are the next largest geographic unit and they are indeed groupings of blocks. Census tracts are comprised of block groups. A census place is typically a municipality but can be any area designated by the Census as a statistically relevant definitive place. The study area has several census-designated places: Helena Valley Northeast, Helena Valley Northwest, Helena Valley Southeast, Helena Valley West Central, Helena West Side, and the City of Helena and town of East Helena.

The Helena transit study area for purposes of demographic information is the area previously identified as a potential Urban Transportation District. It includes parts of census tract 2, 3, 7, 10, and 12; and all of census tracts 4, 5, 6, 8, 9, and 11. A map of the census tracts is shown in Figure 2-1.

Historically, Helena and Lewis and Clark County both have enjoyed a steady growth rate. However, in the mid-1990s, the City's growth rate surpassed the County's for the first time, reflecting a statewide trend of urban population growth. Incorporated areas are growing faster than unincorporated areas, and annexation will be an important factor for forecasting population numbers. The rate at which the City of Helena grows in the future will depend primarily upon how fast annexation occurs.

Between 1970 and 2010, Lewis and Clark County's population increased 86.1% from 33,281 to an estimated 63,395, according to the U.S. Census Bureau 2010 Demographic Profile. Those estimates indicate that from 1970 to 2010, the unincorporated areas of the County grew at a much faster percentage than the incorporated areas of Helena and East Helena.

The 2010 Census estimated the city's population at 28,190, making Helena Montana's sixth most populated city. Population is expected to increase to about 39,268 residents by 2030 based upon a projected annual growth rate of approximately 1.3%.

¹ Because the American Community Survey is a survey of a sample of the population, results are extrapolated by the US Census Bureau to the entire population. In doing so, the extrapolated numbers are not an exact representation for the entire population and are "off" by some amount, which is referred to as the "margin of error." The margin of error is included on most American Community Survey reports and can be quite large in some cases. The decennial census "long form" sample survey also had margins of error, but these were not typically displayed in the standard reports. Because the sample population is smaller in the American Community Survey than the decennial "long form" sample survey, it is likely that the margins of error will be greater in the American Community Survey. For purposes of this report, the American Community Survey results are generally displayed as the estimate number without the margin of error information, but readers are cautioned that these numbers may have large variations.

Most Helena residents over age 25 (94.7%) have a high school diploma, and 42.8% have a college degree. On average, families living within the city have higher earnings and income than families living outside the city.

Helena's median age increased from 38.8 in 2000 to 40.3 in 2009. With 63.3% of the population between ages 20-64 and 14.5% age 65 or older, this aging trend is expected to continue. The segment of population age 65 and older is expected to continue to increase over the next twenty years as the "baby boomers" reach retirement age. 5.4% of the population is under age five, compared to 17.8% age 5-19 years old

Since 2000, the City of Helena has grown to the north and east with the annexation of approximately 1,497.749 acres or 2.34 square miles. Subdivisions annexing to the city range from 3.9 acres to 131 acres and from 3 to 104 lots, increasing the number of residential lots in the city by 974 lots by 2009.

More people live in single-family homes than any other type of structure. Single-family homes account for 54.3% of the city's housing units. Other prevalent housing types include duplexes, homes converted to apartments, or other small apartment buildings (19.8%), large apartment complexes or multi-family apartments (15.8%), mobile homes or trailers (6.1%), and a few row houses and other attached homes (4.0%).

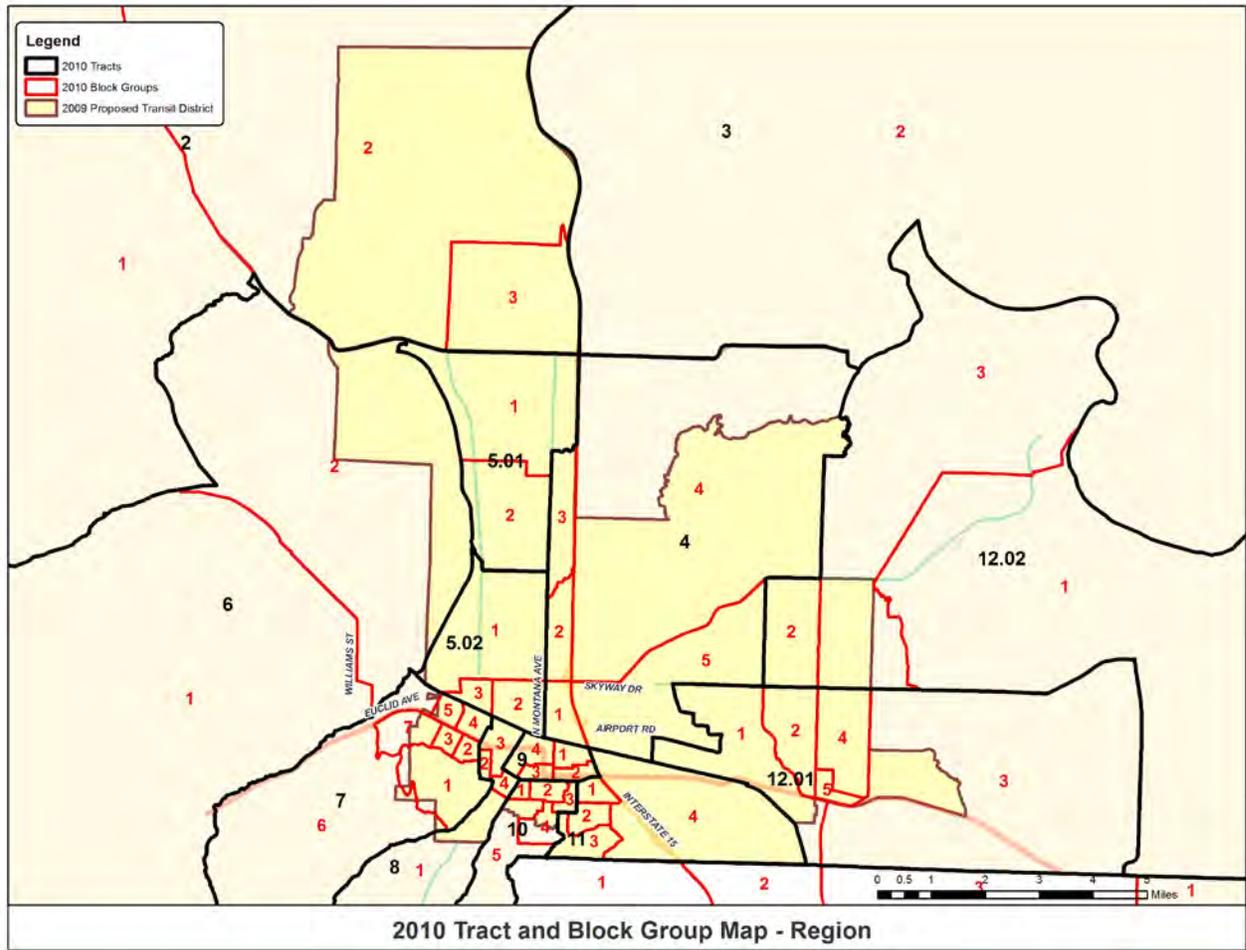
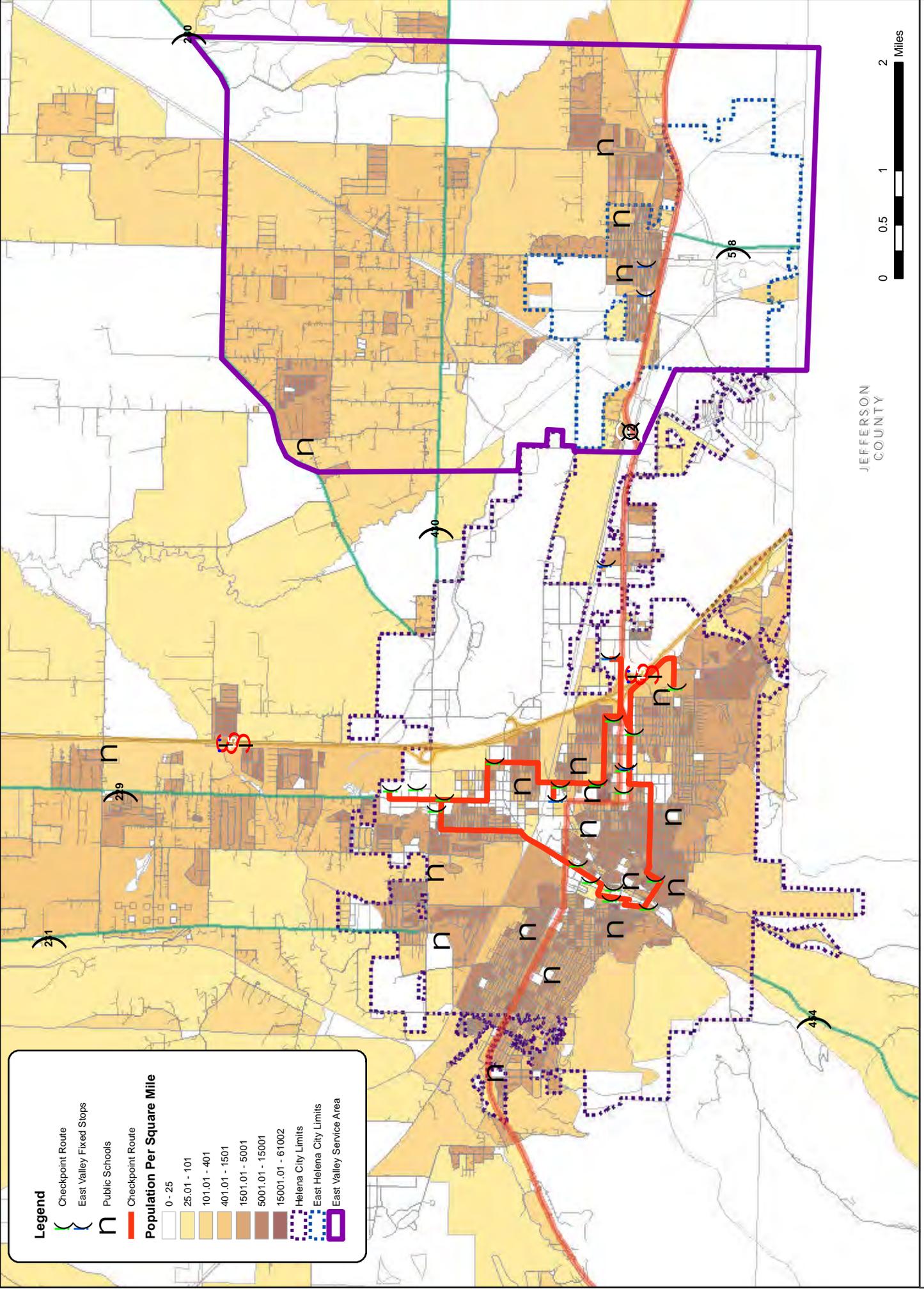


Figure 2-1: Helena valley census tracts and block groups.



Legend

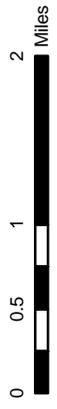
- Checkpoint Route
- East Valley Fixed Stops
- Public Schools
- Checkpoint Route

Population Per Square Mile

- 0 - 25
- 25.01 - 101
- 101.01 - 401
- 401.01 - 1501
- 1501.01 - 5001
- 5001.01 - 15001
- 15001.01 - 61002

- Helena City Limits
- East Helena City Service Area

JEFFERSON COUNTY



Helena Area Population Density (Census Blocks 2010)



2.2 Helena Micropolitan Area and Urban Clusters

The U.S. Office of Management and Budget (OMB) defines a micropolitan area as a geographic area containing an urban core of at least 10,000 (but less than 50,000) population and including the county containing the core urban area as well as any adjacent counties that have a high degree of social and economic integration with the urban core (as measured by commuting to work). Under current law, once a decennial census count exceeds 50,000 people and meets continuous population density requirements, the area will become urbanized, a Metropolitan Planning Organization will form, and the transit system will report directly to FTA instead of the state.

The micropolitan area consists of all of Lewis and Clark County and Jefferson County. The urban cluster includes persons living within the City of Helena, the Town of East Helena, unincorporated areas of southern Lewis and Clark County (Helena Valley), northern Jefferson County, and the northern area of Broadwater County west of the Missouri River. These areas are very closely related with the social, employment, commercial, and public services located in Helena. Many persons living outside Helena make daily trips into the City for work, shopping, services, and recreation. The Helena micropolitan area had approximately 51,966 people in 2011, for an estimated population increase of 9% from the year 2000. Continuous density requirements have not been met.

Residents of outlying, unincorporated areas contribute to Helena's culture and economy, but they also are major users of public services, adding to the cost of public services and increased environmental effects within the City.

By 2030, approximately 90,365 people could reside in the Helena Valley area. The population of Helena, East Helena, and the adjacent unincorporated areas is projected to continue to grow steadily, by approximately 65%-66% between 2010 and 2030. The population of the City of Helena is projected to increase from 25,780 in 2000 to 39,268 by 2030 based upon an estimated annual growth rate of 1.3%.

Using an annual growth rate of 1.33%, the 2011 Growth Policy calculated Lewis and Clark County's population would increase from 55,716 people in 2000 and 61,942 in 2009, to 80,591 by 2030.

There is a chance in the next transportation authorization act that federal law will change to raise the population threshold for new urbanized areas to 200,000, which would leave Helena in the non-urbanized, non-MPO classification.

2.3 Transit-Dependent Population Characteristics

This section provides information on individuals considered by the transportation profession to be dependent upon public transit. Financial limitations, disabilities, and age are the characteristics most likely to result in an individual being transit-dependent. Younger persons who are not old enough to drive and students who cannot afford a vehicle are more likely to use public transit, walk, or bike. Seniors may be more likely to use public transit for a variety of reasons, including lack of access to a vehicle or inability to drive. People with physical or mental disabilities are more likely than the general population to be unable to drive and thus more reliant on public transportation. Table 2-1 below provides statistics for age and employment.

The 2011 Growth Policy also provides good summary information for some of these populations. In 2000, 14.9% of Helena and non-City residents of Lewis and Clark County had a disability. This disability rate was lower than state and national norms. Approximately 12.3% of City residents had incomes below the poverty level in 2009, a greater percentage of persons living within Helena than for non-City residents of the county. The poverty rate for all of Lewis and Clark County was 10.4%, which is lower than the state norm. As the regional population grows, its low-income population also is expected to grow.

Table 2-1: 2011 American Community Survey, Population Characteristics, City of Helena

Subject	Helena city, Montana			
	Estimate	Margin of Error	Percent	Percent Margin of Error
SEX AND AGE				
Total population	27,978	+/-34	27,978	(X)
Male	13,687	+/-284	48.9%	+/-1.0
Female	14,291	+/-288	51.1%	+/-1.0
Under 5 years	1,620	+/-270	5.8%	+/-1.0
5 to 9 years	1,407	+/-221	5.0%	+/-0.8
10 to 14 years	1,381	+/-220	4.9%	+/-0.8
15 to 19 years	1,724	+/-248	6.2%	+/-0.9
20 to 24 years	2,463	+/-247	8.8%	+/-0.9
25 to 34 years	3,437	+/-326	12.3%	+/-1.2
35 to 44 years	3,193	+/-240	11.4%	+/-0.9
45 to 54 years	3,927	+/-337	14.0%	+/-1.2
55 to 59 years	2,156	+/-248	7.7%	+/-0.9
60 to 64 years	2,319	+/-261	8.3%	+/-0.9
65 to 74 years	2,061	+/-237	7.4%	+/-0.8
75 to 84 years	1,556	+/-244	5.6%	+/-0.9
85 years and over	734	+/-199	2.6%	+/-0.7

Table 2-2: American Community Survey 2011, Economic Characteristics – City of Helena

Subject	Helena city, Montana			
	Estimate	Margin of Error	Percent	Percent Margin of Error
EMPLOYMENT STATUS				
Population 16 years and over	23,364	+/-368	23,364	(X)
In labor force	15,712	+/-541	67.2%	+/-2.2
Civilian labor force	15,683	+/-548	67.1%	+/-2.2
Employed	14,840	+/-534	63.5%	+/-2.2
Unemployed	843	+/-206	3.6%	+/-0.9
Armed Forces	29	+/-33	0.1%	+/-0.1
Not in labor force	7,652	+/-527	32.8%	+/-2.2
Civilian labor force	15,683	+/-548	15,683	(X)
Percent Unemployed	(X)	(X)	5.4%	+/-1.3
Females 16 years and over	12,185	+/-278	12,185	(X)
In labor force	7,844	+/-386	64.4%	+/-2.9
Civilian labor force	7,844	+/-386	64.4%	+/-2.9
Employed	7,586	+/-387	62.3%	+/-2.8
Own children under 6 years	1,894	+/-296	1,894	(X)
All parents in family in labor force	1,404	+/-265	74.1%	+/-9.7
Own children 6 to 17 years	3,155	+/-317	3,155	(X)
All parents in family in labor force	2,604	+/-328	82.5%	+/-6.1
COMMUTING TO WORK				
Workers 16 years and over	14,633	+/-546	14,633	(X)
Car, truck, or van -- drove alone	10,242	+/-589	70.0%	+/-2.8
Car, truck, or van -- carpoled	1,931	+/-369	13.2%	+/-2.4
Public transportation (excluding taxicab)	88	+/-80	0.6%	+/-0.5
Walked	1,057	+/-205	7.2%	+/-1.4
Other means	685	+/-194	4.7%	+/-1.3
Worked at home	630	+/-228	4.3%	+/-1.6
Mean travel time to work (minutes)	13.6	+/-1.0	(X)	(X)
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL				
All families	(X)	(X)	7.2%	+/-2.4

2.4 Employment and Economy

As HATS works to design new services to meet the needs of commuters, it will be essential to use employment and economic information as a basis for strategic planning decisions. The following

information from the 2011 Growth Policy describes a wide variety of important employers and business organizations. All of them are potentially valuable partners for HATS.

The service sector, which includes medical services and education, will continue to grow significantly and will remain the largest economic sector, with a projected increase from 17,300 jobs in 2010 to 22,300 jobs by 2030. The government sector is the second largest employer, with state and local government (City of Helena, Lewis and Clark County, Helena School District) expected to increase employment from 8,100 jobs in 2010 to 10,400 jobs by 2030. Fort Harrison is the primary military training site for the National Guard in Montana. Nearly 900 military and civilian employees are employed at the facility.

Helena has a highly educated work force. Helena also has a variety of training programs through the school system and other organizations, such as the Laborers AGC Training, that provide a skilled workforce.

Helena is home to several groups and civic organizations that promote business interests in the area. The Chamber of Commerce, the Business Improvement District, unions, Montana Business Assistance Connection, and several service groups and non-profit organizations support both business and employees.

Table 2-3: Top 20 Private Employers in Lewis and Clark County

Employer	Code
St. Peter’s Hospital	A
Blue Cross/Blue Shield	B
Carroll College	C
Rocky Mountain Dev. Council	C
Wal-Mart	C
Albertson’s	D
American Chemet Corporation	D
Costco	D
Family Outreach	D
Heritage Propane	D
Independent Record	D
Intermountain Children's Home	D
Mountain West Bank	D
Shodair Hospital	D
Student Assistance Foundation	D
Summit Aeronautics	D
Town Pump	D
Valley Bank	D
Vans Thriftway	D
West Mont	D

(Based on 4th Quarter 2009 Data – Class D= 100 to 249 employees
 Listed in Alphabetical Order by Employment Class Code)
 Class A = 1000+ employees
 Class B = 500 to 999 employees
 Class C = 250 to 499 employees
 Class E = 50 to 99 employees
 Class F = 20 to 49 employees
 Class G = 10 to 19 employees

3 Community Planning

To achieve sustainable, livable communities requires engagement in multi-modal planning by all appropriate government agencies, decision-makers and other stakeholders. It is important for HATS to be an integral part of this process because HATS' services are affected by a variety of county, community and neighborhood-level planning decisions. In some communities, mobility managers and other public transportation officials play leadership roles in these efforts. At a minimum, HATS need to be broadly engaged in promoting and planning improved and expanded options for transit and carpooling; walking and biking; and transit oriented development.

The planning partners and planning documents summarized below indicate many opportunities for HATS to coordinate with a broad range of community stakeholders to improve transit services and better integrate transit with non-motorized transportation infrastructure.

3.1 Planning Partners

Following is a summary of the most important partners in planning efforts affecting HATS.

Transportation Coordinating Committee (TCC)

www.helenamt.gov/services/boards-and-committees/transportation-coordinating-committee-tcc.html

The TCC works closely with the City, County, and State to develop and keep current urban transportation planning, design and construction in the Helena area. The committee adopts and recommends implementation of long and short-range transportation programs for the Helena urban area. Committee meets monthly and its members include 2 City Commission members, 2 County Commission members, 1 Montana Highway Department Representative, 1 Federal Highway Administration Representative, 1 Helena Citizens Council, 1 Planning Board, 1 City Staff Contact, 1 County resident and 2 City residents (1 City resident is a non-voting member).

In many communities, TCC members are often primarily focused on road transportation and see transit as a social service program. There may be a lack of engagement and knowledge concerning public transportation. It is always important for transit providers to be proactive about engaging with their local TCC to ensure that transit needs are fully incorporated into transportation planning decisions.

Helena Area Transportation Council

In a number of planning documents and on the HATS website, The Helena Transportation Advisory Council (HTAC) is referred to as the Helena Area Transportation Council. As described in its bylaws, the HTAC is the locally represented group that cooperatively participates and assists the local transit agency in planning, assessing, prioritizing and coordinating transit services in Helena and designated area. The purpose of the HTAC is to:

1. Provide information and referral exchange among other agencies providing transportation in Helena and the greater Helena Area.
2. Encourage and provide opportunities for volume purchasing of transit goods and services among other agencies.

3. Provide leadership in the coordination and advocacy for the improvement and provision of transportation services in Helena and the greater Helena area.
4. Secure local, state, federal, and private funding for the purpose of maintaining and increasing coordination and operation of public transportation services.

City of Helena Community Development Department

Working in partnership with Helena citizens, businesses and organizations, the City of Helena Community Development Department provides professional staff assistance in planning, development and construction to maintain public health, safety and welfare and create an attractive and sustainable community for all to live, work and play.

The Department assists members of the community with zoning, land use and development questions. Staff also provides information and assistance to developers, the business community and the public relating to any planning, zoning, and land use or development matter. The City continues to consider transit, bicycle, and pedestrian needs as part of the review process for subdivision newer construction and street projects. The City has adopted a Complete Streets policies and has adopted Engineering Standards and Subdivision Regulations that take into consideration bus stop infrastructure and all modes of transportation in the community.

Non-Motorized Travel Advisory Council (NMTAC)

<http://bikewalkhelena.blogspot.com/>

In 2008, the City of Helena established a Non-Motorized Travel Advisory Council (NMTAC). The general purpose of the Council is to advise the City Commission and the Neighborhood Transportation Program. The Council may have up to 7 citizen voting members that represent the biking and walking community, traffic calming experts, and citizens at large, and will include one (1) City Commissioner and one (1) Helena Citizens' Council representative as voting members.

The NMTAC would be an important partner for coordinating transit stops with bicycle and pedestrian facilities.

State and Federal Agencies

Livability and sustainability are undermined along with the safety net for economically disadvantaged populations when federal, state, and local government facilities such as schools and offices for social security, motor vehicle departments, veterans' facilities and unemployment offices are located in areas with poor transportation access. Transit officials can play an important role in preventing bad facility siting decisions if they are engaged in their communities and willing to speak out early in the facility siting process.

Lewis and Clark County Sustainability Coordinator

Lewis and Clark County has a sustainability coordinator who may be a valuable partner for projects such as establishing park and ride lots and rideshare programs.

3.2 Plans

The following plans include useful information for transit planning, as well as a number of recommendations that present opportunities for coordination beyond the current TAC membership to achieve multi-modal planning objectives.

The most directly relevant plans are the previous TDP and the City of Helena's Transportation Plan. As described in the 2011 City of Helena Growth Policy these two plans coordinate with the land use element of the Growth Policy by planning for the provision of transportation facilities that are required for land use development. They support the development of a multi-modal transportation system to provide a functional and safe alternative to automobile dependence.

Helena Area Transit Development Plan (2007-2011)

<http://www.lscs.com/projects/helenatdp/final.htm>

Specific recommendations from HATS 2007-2011 TDP are discussed in more detail in other sections of this update. In summary, recommendations in this plan included ambitious service expansions and vehicle acquisitions; the need for a new transit facility; a strong focus on increased marketing with an extensive implementation recommendations; a fare increase; coordination opportunities with human services transportation providers as well as park and ride coordination with local governments; bus stop infrastructure and signage; and funding recommendations that emphasized the benefits of negotiating contracts with large employers and Carroll College, and establishing a transportation district.

Greater Helena Area Transportation Plan (2004 Update)

<http://www.helenamt.gov/departments/public-works/engineering/transportation-plan.html>

The Helena area's comprehensive transportation plan was last updated in 2004. The study area is bounded by Birdseye Road (western boundary); the base of North Hills (northern boundary); Spokane Creek Road & Hauser Lake (eastern boundary); and the Lewis & Clark County line (southern boundary). Although Jefferson County is not included in the Study Area Boundary, residential and commercial considerations have been incorporated into the Travel Demand Model used to project future traffic conditions. The study area does not include the city of East Helena.

Transportation Plan updates and implementation are governed by the Transportation Coordination Committee (TCC), which includes representatives from local government as well as the Montana Department of Transportation. The plan includes the following transit-related elements:

Transit Goal:

Goal #2: Make transit and non-motorized modes of transportation viable alternatives to the private automobile for travel in and around the community. Pay special attention to the needs of low-income riders by evaluating the full usage potential, and importance, of transit for all income levels.

It is important to recognize that transit service in our community is for some citizens the only mode of transportation utilized. This is especially true for many of our community's elderly and disabled citizen population. The primary goal of the transit system should be to provide reliable service to its users and make that service available to all members of the public. A secondary goal is to make mass transit work

for the community, by reducing parking demand, traffic congestion, and the need for roadway expansion wherever possible.

Transit as an element of Transportation Demand Management:

Objective: Identify and incorporate, as applicable, Transportation Demand Management (TDM) strategies to provide alternatives to private vehicle travel.

The anticipated traffic demand in the year 2025 will produce considerable traffic congestion and excessive vehicle delays at approximately 46 major intersections. In order to efficiently respond to the traffic demands identified within the community, a Traffic Demand Management (TDM) strategy is provided. Possible TDM strategies include ride-sharing, carpools, non-motorized forms of transportation, and public transit. Another possible strategy is to encourage local businesses to allow employees to use flex-time to help shift traffic demand away from the peak hours.

Specific short-term and long-term transit improvement recommendations:

Chapter 2 of the 2007 Transportation Development plan includes a comprehensive list of short-term and long-term recommendations for improving transit recommendations. Overall, these recommendations called for expanding service and marketing, and included a strong emphasis on establishing park and ride lots and ridesharing programs in outlying communities, including communities in Jefferson County.

City of Helena Complete Streets Policy (2010)

<http://www.helenamt.gov/public-works/engineering/complete-streets-policy.html>

In December 2010, the City of Helena adopted a Complete Streets policy (Resolution #19799). The policy calls for streets that have “appropriate street features to accommodate and coordinate all modes of transportation, both motorized and non-motorized, and people of all ages and abilities, with special consideration to optimize safety, interconnectivity, compatibility, and convenience.” It defines “complete street features” to include “public transportation stops and facilities and transit priority signalizations”.

The 2011 Growth Policy references the Complete Streets Policy and states that “complete streets could save money, promote a more physically active community (which has health benefits), save or reduce direct and indirect costs associated with transportation, reduce greenhouse gas emissions, and make a more livable community.”

The policy also directs city staff to “make a recommendation to the Commission of changes to City Code and engineering and design standards that are necessary to implement this policy into the design and construction of new streets as complete streets.” To ensure that appropriate transit elements are incorporated into new streets as well as upgrades of existing streets, it will be important for HATS staff to work with city planning and engineering staff on an ongoing basis.

City of Helena 2011 Growth Policy

www.helenamt.gov/community-development/planning/2011-growth-policy-adopted.html

This is a comprehensive planning document for the city. It includes detailed analyses of socioeconomic trends (population, housing, economics, crime, etc.), local services and public facilities (law

enforcement, fire protection, transportation, education, etc.), and land uses. The Growth Policy includes goals, objectives and implementation strategies addressing a wide variety of topics.

A number of goals and objectives align with the concept of transit oriented development, encouraging infill, mixed-use development, and the development of housing located in proximity to physical, technological, social, and economic infrastructure. Issues related to public transportation in the Growth Policy include a) a possible increase in demand for public transit as people look for alternatives for getting to work; particularly in the areas of downtown and at the Capitol complex; b) a need to create a better east west bus route system, and park and ride facilities to help access the transit system; c) the input indicated the use and expansion of public transit and pedestrian/bicyclist access to those services and d) the primary choice of travel is the individual automobile.

The plan's transportation chapter (Chapter 6), includes a brief overview of existing transit services, a discussion of funding challenges, and discussions of transportation challenges created by growth patterns and pedestrian and bicycle connectivity needs. Issues related to public transportation in the Growth Policy include a) a possible increase in demand for public transit as people look for alternatives to getting to work; particularly in the areas of downtown and at the Capital complex; b) a need to create a better east-west bus route system and park-and-ride facilities to help access the transit system; c) the input indicated the use and expansion of public transit and pedestrian/bicyclist access to those services; and d) the primary choice of travel is the individual automobile.

The plan includes a goal that supports transit, calling for a multimodal transportation system that:

- A. meets the current and future transportation needs of the greater Helena area including, but not limited to, travel by automobile;
- B. minimizes demand for petroleum products and emissions of green-house gases by promoting transportation choices and efficient land use patterns;
- C. promotes public health by facilitating non-motorized transportation;
- D. meets the unique transportation needs of the area's elderly, disabled, and disadvantaged populations;
- E. respects the area's natural and historic context and minimizes adverse impacts to the environment and existing neighborhoods;
- F. provides for transportation choices in the community to allow safe and efficient travel;
- G. minimizes vehicle miles traveled;
- H. promotes a development pattern that is more compact and less dispersed;
- I. connects to regional transit

It also includes the following objective that aligns with the Complete Streets Policy, "Include appropriate facilities that are safe, comfortable, integrated and convenient for travel by persons of all ages and abilities, automobile, foot, bicycle, and public transit in major street improvement projects and developing areas."

Lewis & Clark County Growth Policy (2003)

www.lccountymt.gov/community-development-planning/county-growth/growth-policy.html

The transportation chapter of Lewis and Clark County’s 2003 Growth Policy mentions HATS but does not include any transit recommendations. It does include a transportation demand management recommendation that states, “One solution to increasing the systems capacity is by seeking to reduce demands on the system (i.e., the number of trips taken) through a variety of transportation demand management (TDM) programs. Many larger communities have been required to implement TDM programs at significant cost after conditions (congestion, air quality, etc.) became substandard. Taking an early, proactive approach with carefully selected, cost-effective TDM measures can sometimes reduce the need for large and costly infrastructure expansion projects. The opportunities are enhanced when transportation and land use planning efforts have been closely coordinated.”

Helena Climate Action Plan

Helena’s Climate Action Plan supports the expansion of public transportation. Specifically, it includes a recommendation supporting formation of an urban-Area Transportation District. “The goal of this recommendation is to decrease vehicle miles driven in the Helena area for commuting and non-work related travel, and to increase the mobility of elderly, disabled, low-income, student and visitor populations. The Task Force urges the City Commission to support the formation of an Urban Area Transportation District (UATD) in order to establish a consistent base-funding source for capital costs, operation and maintenance of an expanded Helena-area public transportation system. The Task Force believes that a UATD would be the most effect way to build and maintain high-quality public transportation with regular service to Helena commuters, elderly, disabled, low-income, student, and visitor populations.”

The plan also includes a list of stakeholders that would be valuable partners in working to achieve complete streets goals and helping promote using transit for commuting. These stakeholders include the Non-Motorized Travel Advisory Council NMTAC, Helena Area Transportation Council, City Parks and Recreation Department, Helena Chamber of Commerce, MDT, Helena Bicycle Club, Plan Helena, Try Another Way State Employees (TAWSE), Helena Vigilante Runners, and Helena bike stores.

4 HATS Existing Services

This chapter provides a comprehensive summary of HATS' existing services, providing a baseline for discussion of system performance and potential changes in the following chapters.

HATS currently offers general public curb-to-curb service, one check-point (fixed) route in town, and the East Helena route. In addition, HATS partners with other organizations to provide transportation options. A summary of services are shown in Table 4-1. Scanned copies of the brochures for these services are included in Appendix A.

Table 4-1: HATS and HATS-Partner Transportation Services
(HATS weekday services shown in first three rows)

Service	Hours/Days of Service	Fare	Notes	Operating Expense (FY 2012)
Check Point	M-F 7am-6pm*	\$0.85 all riders	Daily service	\$215,542
Curb to Curb	M-F 6:30am-5:00pm*	see fare structure table	Daily service	\$586,785
East Valley Bus	M-F 7am-11am & 1pm-5pm*	see fare structure table	Daily service	\$174,162
Trolley to Trails	Sat & Sun, Jun 2-Sept. 30; 3 morning runs departing 8am-9:20am	free	Operated by HATS, funded through Downtown Business District	Not Analyzed
Summer Youth Trolley	Jun 11-Aug 10 9:20am-2:00pm; restricted to youth age 8-18; under 8 with caregiver; adults with child	free	Operated by HATS, funded through Youth Connections	Not Analyzed
Head Start	When school is in session	N/A	Operated by HATS, funded by Head Start	\$76,485
RMDC Senior Transportation	M-F	Free for RMDC participants within city limits	Operated by RMDC, included in HATS budget per MDT consolidation plan	\$130,000
Intercity Bus**	365 days/year	Sample round trip Helena-Missoula: \$32	HATS serves as ticket agent	\$86,287

* No service on state and federal holidays

** As of the time of this writing Montana's intercity bus service lacks clarity due to March 2013 Rimrock shutdown.

A variety of local partners work together to leverage local dollars towards federal and private grant programs. Table 4-2 shows the local partners and the services they help fund or staff.

Table 4-2: Partners on Current Services

Partner	Website									
		Checkpoint	East Valley Bus	Curb to Curb	Trolley to Trails	Summer Youth Trolley	Head Start	RMDC Senior Transportation	Intercity Bus	Bike Walk Bus Brochure
HATS	http://www.ci.helena.mt.us/index.php?id=393	x	x	x	x	x			x	x
City of Helena	http://www.ci.helena.mt.us	x	x			x				
Intercity bus	** As of the time of this writing Montana’s intercity bus service lacks clarity								x	
Lewis & Clark County	http://www.co.lewis-clark.mt.us/					x		x		x
Helena Parks & Recreation	http://www.ci.helena.mt.us/departments/parks-recreation.html					x				
Youth Connections	http://www.youthconnectionscoalition.org/					x				
The Helena Business Improvement District (BID), Downtown Helena, Inc. (DHI)	http://www.downtownhelena.com/				x					
Rocky Mountain Development Corporation							x	x		
Bike Walk Helena	http://bikewalkhelena.org/									x

4.1 Service Description

HATS fixed route service is open to the general public, as is the curb-to-curb service. All vehicles currently in service are wheelchair accessible, are equipped with lifts, and are air-conditioned. Fixed route vehicles have bike racks, while some curb-to-curb vehicles do not. HATS operates the following weekday services, the focus of the majority of analysis in this report.

Checkpoint

The Check Point Bus is a fixed route operating within city limits that runs every hour with set stops along the route. No call in is required for service.

East Valley

The East Valley bus service functions as a commuter bus service from East Valley, Eastgate, East Helena, Capitol Hill Mall, and downtown Helena. The service began operating in early 2006. It operates as a deviated route, picking up passengers within a vast area of coverage that has become highly difficult to keep on time.

Curb-To-Curb

The Curb-to-Curb bus runs weekdays within the Helena city limits. Service is open to the general public but targeted to seniors, people with disabilities or riders not near a checkpoint bus stop. Passengers are picked up at the closest curb to their location and delivered to the closest curb location. Rides are arranged by calling and scheduling service at least 24—but no more than 48—hours in advance. Some urgent requests are handled on a same-day basis.

ADA Eligibility

HATS Curb-to-Curb eligibility exceeds the requirements of the Americans with Disabilities Act (ADA). Under ADA, HATS is required to provide paratransit only to riders if they live within $\frac{3}{4}$ of a mile of a fixed route bus stop and cannot travel to the stop because of a disability. Eligibility can be situational, such as an inability to access a bus or train because of environmental or architectural barriers not under the control of the transit agency. ADA paratransit service must be available at the same hours and days, and payment by ADA eligible riders cannot be more than twice the regular fixed route fare. The ADA further requires that paratransit rides be provided to all eligible riders if requested any time the previous day, within an hour of the requested time.

Additional services

The HATS budget and ridership statistics includes the following services.

Trolley to Trails

Trolley to Trails picks up at the Women's Mural at the corner of Last Chance Gulch Walking Mall & Broadway. Shuttle picks up at 8:00 am, 8:40 am and 9:20 am. Trolley accommodates bikes. The service brings bike riders and hikers to the top of Mount Helena Ridge Trail, which ends at Mount Helena City Park near downtown and the shuttle origin. Service is free but donations are appreciated. Trolley to Trails operates only during summer months.

Summer Youth Trolley

Responding to community input, HATS started the Summer Youth Trolley in 2012. This service accesses 17 summer recreation destinations.

Discontinued Service: Capital Commuter

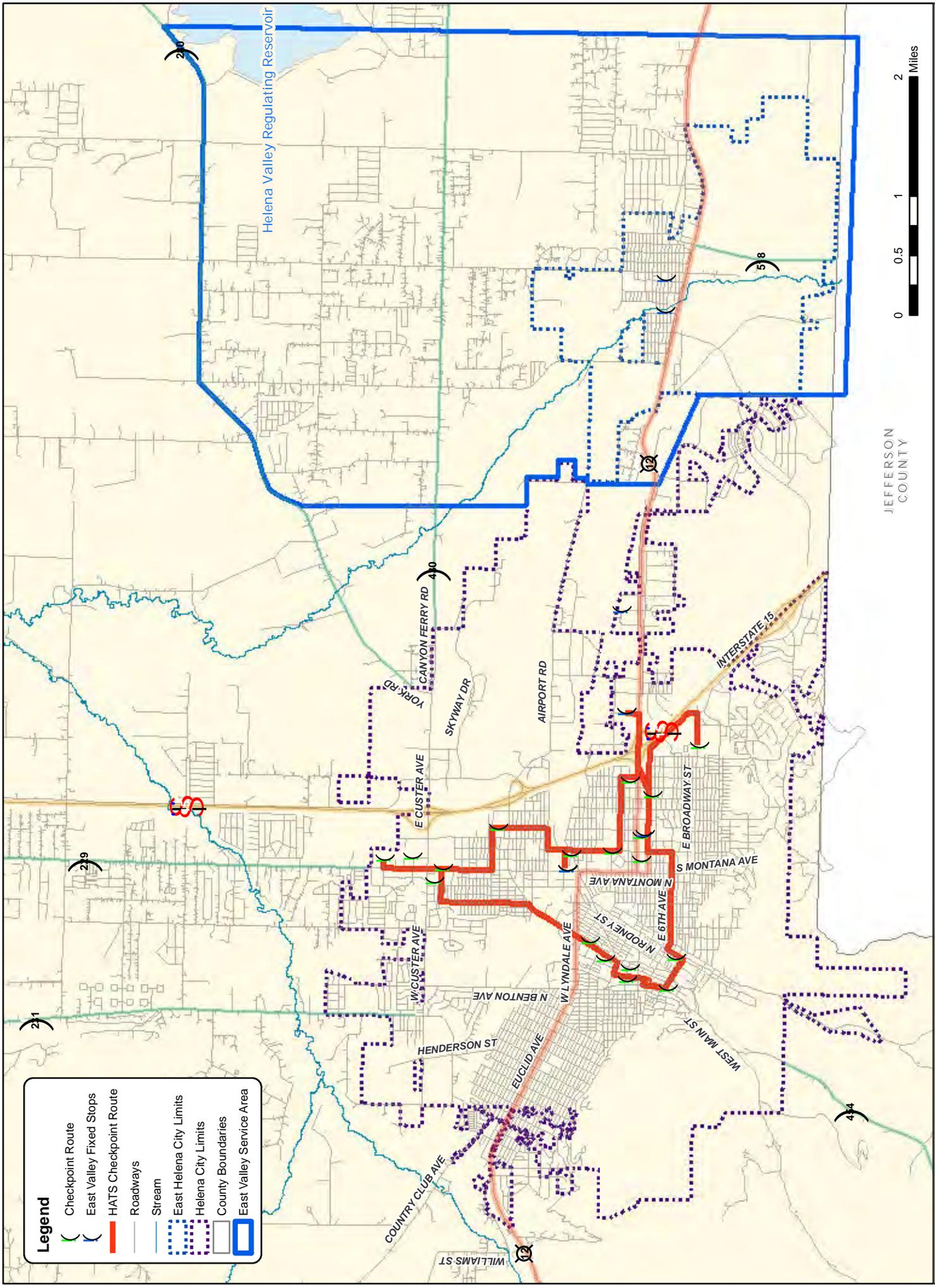
From July 2008 to June 2010 HATS operated a Capital Commuter route tailored to state employees. The service was discontinued when the Governor's Office cut funding as part of cuts during the recession.

Discontinued Service: Downtown Trolley

Trolley ran on a 20-minute circuit connecting downtown with the Great Northern Town Center and capital complex during the summer. It ran from 2003 until 2011.

Contracted Services

The City of Helena also includes Head Start and Rocky Mountain Development Council transportation in its budget in compliance with its MDT-designated role as the lead transportation agency for the county. These services are described in Chapter 6.



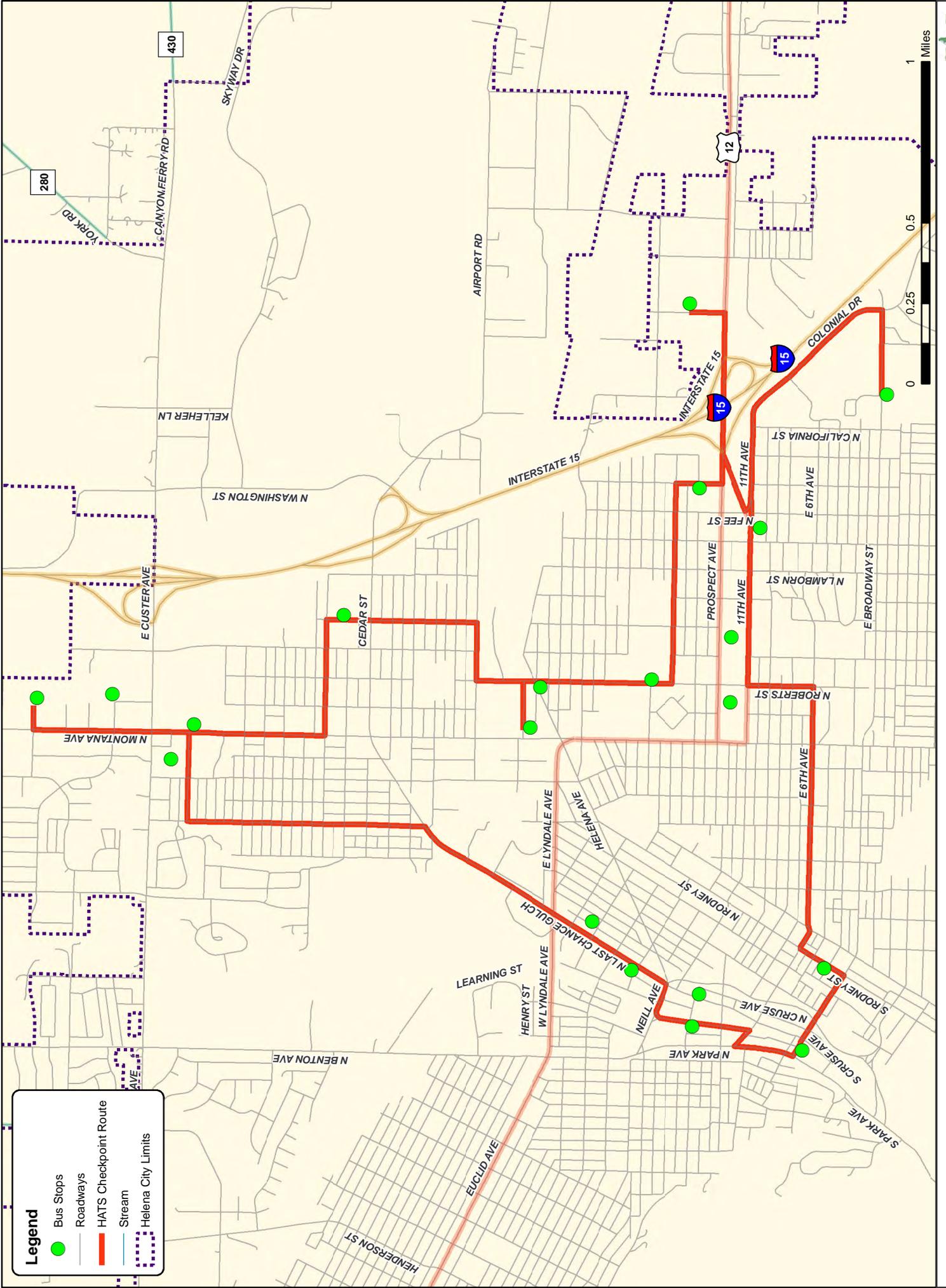
Legend

- Checkpoint Route
- East Valley Fixed Stops
- HATS Checkpoint Route
- Roadways
- Stream
- East Helena City Limits
- Helena City Limits
- County Boundaries
- East Valley Service Area

JEFFERSON COUNTY

Helena Area Transit Existing Routes





Checkpoint Route



4.2 Fares

HATS is a fare-based system. Tokens and passes can be purchased from the drivers and at the HATS Office located at 1415 North Montana Avenue. Drivers also take cash but do not make change. HATS has an agreement with Youth Connections for kids to ride free in the summer but does not currently have contracts or agreements with schools, large employers, or other organizations to provide rides at no cost to the rider.

Fares cover 7% of the total cost of HATS service. A good target for rural systems is 10% farebox recovery ratio.

Table 4-3: HATS Fare Structure

		Fixed Route	Curb to Curb		Curb to Curb pickup or drop off at fixed route (Green)
		Adult	Senior/ Disabled (Red)	General Public (Blue)	
In-town					
	Daily	\$0.85	\$0.85	\$1.50	\$1.00
	10 rides		\$8.00	\$14.25	\$9.50
	21 rides		\$16.00	\$28.50	\$19.00
East Helena/East Valley					
	Daily	\$1.50	\$0.85	\$1.50	\$1.00
	10 rides		\$8.00	\$14.25	\$9.50
	21 rides		\$16.00	\$28.50	\$19.00

Children 6 and under ride free; Helena youth can ride free in summer through the HEY Ride program.

4.3 Infrastructure

Transit Center

HATS recently opened a new transit center. This facility is HATS’ headquarters, housing administrative offices and a conference room, as well as a bus garage, wash bay and maintenance facility. There is room to expand the garage and maintenance facility in the future. Additionally, the site has a separate garage for the trolley.

The transit center also serves the public as a location where riders can access both HATS and intercity busses and buy tickets and passes for bus services. The facility includes a waiting room with seating for 20 people and restrooms, as well as a covered area outside that provides shelter for riders waiting for buses. The waiting room includes a video monitor that displays information about intercity bus services. The video monitor does not display any information about HATS services. If HATS adopts technology to provide customers with real-time information about bus locations, an electronic display with this information should be installed in the facility.

Intercity bus passengers who arrive at 1:00 pm often need food and currently the only option is a vending machine in the waiting room. To better meet this need in the future, it may be worth exploring the potential to contract for a lunchtime food cart.

The transit center is located in a commercial area in the center of the community's east side, near important arterials that provide good vehicle access. A downside of this location is the lack of safe, convenient bicycle and pedestrian access. Currently, the facility only has sidewalk access from the south and much of the surrounding area lacks a sidewalk system. Over time, HATS should work with the city's Public Works and Planning departments, BikeWalk Helena and other partners to install and improve pedestrian and bicycle facilities in the area.

Bus Stop Infrastructure

HATS has 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. The following sections present an overview of bus stop infrastructure elements.

Bus Stop Signs

Bus stop signs are an important element of a transit system, making the system easier to use for customers, especially new riders. Bus stop signs are also one of the most cost effective forms of marketing. Unlike advertisements or brochures, they provide permanent visibility with minimal ongoing cost. Moreover, they target potential customers in a specific area served by the bus. Stop signs, wherever possible, should be placed even with the front door of the bus to let riders know where to stand and to serve as a guide for the operator. Trash receptacles may be mounted on the sign posts as well.

Bus Pull-outs

HATS operates on high traffic roads but has no pull-outs that can remove buses from the travel lane as people board and debark. We recommended working with MDT, the City, and the County to include bus pullouts in safe locations when road are redesigned.

Seating at Bus Stops

Seating is an important infrastructure at bus stops. For many elderly and disabled riders they are essential, and overall they make a bus system more convenient, more visible, and more enjoyable.

Many low-maintenance, vandal-proof designs have been developed in communities around the country. HATS has identified a low-cost, compact seating system that attaches to a pole. This could be a good fit for low volume bus stops.



Figure 4-3: Example of a stop with schedule and simple seating.
(www.simmeseat.com)

Shelters

The need for shelters at high-use bus stops was frequently cited in our public and stakeholder input. We recommend budgeting to install shelters at HATS' most important bus stops as well as locations that receive high use by seniors and locations that are more exposed to wind. More than any other bus stop infrastructure, attractive bus shelters provide effective high-visibility marketing, creating awareness of the bus system and sending the message that public transportation is an important part of the community.

Nine or ten shelters should be provided in the first year of service followed by additional shelters in future years. Costs can vary significantly; low-cost shelters are estimated to cost approximately \$8,000 per shelter. Larger shelters, shelters with protection on three sides, and shelters with an architectural design to tie into a development's architecture or a historical district can cost more than twice that amount.

Lighting at Bus Stops

Lighting is an important consideration for high-use bus stops with benches or shelters. Lighting is important for customer safety, and is also important for marketing as it improves visibility and public awareness and helps create a welcoming atmosphere at bus stops.

Bike Racks

Transit systems nationwide are seeing increased use by bicyclists, leading to the common occurrence of demand for on-board bike racks exceeding capacity. Besides using 3-bike racks instead of 2-bike racks on the front of the bus, bike racks should be installed at stops with high bicycle use.

4.4 Capital Equipment

The Maintenance & Operations Review (Appendix C) includes a number of recommendations for HATS buses. These include the need for HATS to have greater input into bus specifications MDT develops for purchase of new equipment; the idea of making changes in the appearance of the buses so that the public can differentiate between the fixed route and curb-to-curb services; installation of surveillance equipment; and installing better advertising racks.

4.5 Cost Allocation Model

Cost allocation provides a mechanism to assess performance, estimate costs for new services, and assign payment to various partners. It allows comparison between varying types of service, such as a commuter service that covers a longer distance at a higher speed, and an in-town route that travels at a lower average speed. It can also be used for negotiations with partners such as Lewis & Clark County, East Helena, RMDC, human service agencies, and large employers. The standard cost allocation methodology used in transit is a tool for fair payment of costs when the provision or payment for service is shared.

Developing a cost allocation model requires a budget or statement of operating funds from the service provider, the miles of service, and hours of service for a year. The steps shown in Figure 4-4 are standard practice within the transit industry. Capital costs usually are excluded because of high year-to-year variability.

The following equation shows the cost allocation model for HATS from the costs, categorization, and variables shown in Figure 4-5.

$$\text{2012 Operating Cost} = 1.45 \left(\$34.90 \times \begin{array}{l} \# \text{ of Hours} \\ \text{in Service} \end{array} + \$1.16 \times \begin{array}{l} \# \text{ of Miles} \\ \text{in Service} \end{array} \right)$$

The average cost per hour of service is \$72.31. This value can be used when estimating costs for services that have similar characteristics. The average cost per mile of service is \$5.58.

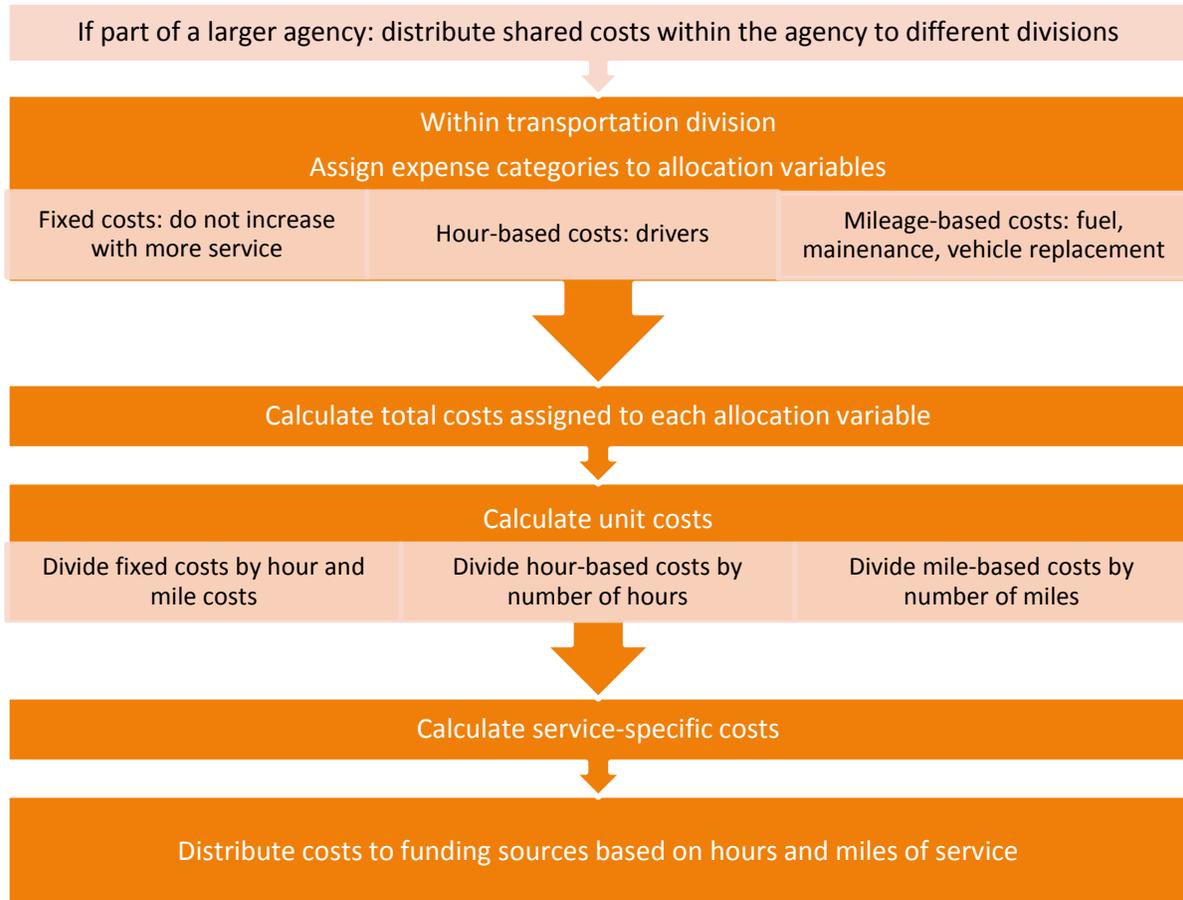


Figure 4-4: Cost allocation methodology for public transportation¹

The HATS cost allocation model is based on costs reported to MDT for fiscal year 2012 and service miles and hours recorded in HATS spreadsheets and calculated from the schedules.

Values for the cost model are calculated as follows:

$$\text{Fixed Cost Factor} = 1 + \frac{\text{Fixed Costs}}{\text{Hour Costs} + \text{Mile Costs}} = 1 + \frac{\$301,683}{\$471,225 + \$203,580} = 1.45$$

$$\text{Average Hour Unit Cost} = \frac{\text{Hour Costs}}{\text{Vehicle Hours}} = \frac{\$471,225}{13,504 \text{ hr}} = \frac{\$34.90}{\text{hr}}$$

$$\text{Average Mile Unit Cost} = \frac{\text{Mile Costs}}{\text{Vehicle Miles}} = \frac{\$203,580}{174,957 \text{ mi}} = \frac{\$1.16}{\text{mi}}$$

¹ Distribution of costs for coordinated human service-public transportation demand response service also should factor passenger time and passenger miles. This requires demand response management software and is a subject of national research.

Operating Costs	FY 2012 Costs	Cost by Category		
		Vehicle-Hours	Vehicle-Miles	Fixed Costs
1. Labor				
a. Operator's wages	\$300,096	\$300,096		
b. Mechanic's wages	\$47,579		\$47,579	
c. Dispatcher's wages	\$29,275	\$29,275		
2. Fringe Benefits				
a. Operator's/Mechanic/Dispatcher Fringe	\$141,854	\$141,854		
3. Services				
a. Professional and technical services	\$3,341			\$3,341
b. Advertising fees	\$3,431			\$3,431
c. Custodial services	\$0			\$0
d. Other services	\$6,863			\$6,863
4. Materials & Supplies Consumed				
a. Fuel and Oil	\$89,341		\$89,341	
b. Other materials and supplies	\$10,815			\$10,815
5. Purchased Transportation Services				
a. Purchased transportation services	\$0	\$0		
6. Taxes				
a. Vehicle Licensing and registration fees	\$0			\$0
7. Other Operating Expenses				
a. Other Expenses	\$0			\$0
TOTAL OPERATING COSTS	<u>\$632,595</u>			
Administrative Costs				
8. Labor				
a. Other salaries (Manager and Administrative personnel)	\$70,384			\$70,384
9. Fringe Benefits				
a. Other salaries fringe benefits distribution	\$19,288			\$19,288
10. Materials and Supplies				
a. Office Supplies	\$1,938			\$1,938
11. Casualty & Liability Costs				
a. Casualty and Liability Costs	\$21,747			\$21,747
12. Utilities				
a. Utilities (Gas, Electric, Sewer, Phone and Internet)	\$4,355			\$4,355
13. Taxes				
a. Property tax	\$2,945			\$2,945
14. Leases and Rentals				
a. Vehicle	\$0			\$0
b. Facilities	\$0			\$0
15. Miscellaneous Expense				
a. Professional/technical services	\$0			\$0
a. Dues and subscriptions	\$523			\$523
b. Travel and meetings	\$704			\$704
c. Drug Testing	\$4,762			\$4,762
d. Promotional/Coordination Ridesharing	\$343			\$343
e. Indirect Cost (Attach plan from Grantee)	\$150,244			\$150,244
16. Other Administrative Expenses				
a. Other expenses (personnel, admin)	\$0			\$0
TOTAL ADMINISTRATIVE COSTS	<u>\$277,234</u>			
Maintenance Costs				
17. Maintenance Costs				
a. Vehicle maintenance parts & service	\$66,660		\$66,660	
TOTAL MAINTENANCE COSTS	<u>\$66,660</u>			
Total System Operating Costs	<u>\$976,488</u>			
Total Expenses		\$471,225	\$203,580	\$301,683
		Vehicle-Hours	Vehicle-Miles	Fixed Cost
Hours		13,504		
Miles			174,957	
Fixed Cost Factor				1.45
Average Unit Cost				
Cost per Hour		\$34.90	\$1.16	
Cost per mile		\$72.31	\$5.58	

Figure 4-5: HATS Costs by category

5 System Performance

Tracking of cost-based and ridership-based performance measures helps assess the health of a transportation system as well as the benefits it is providing to the community. Comparing HATS' performance measures to peer services in similar communities – especially communities with more mature fixed route systems – provides valuable insight for setting benchmarks for HATS future performance. As recommended in the 2007 TDP, overall performance targets for HATS include:

- Fixed-route services should have a minimum productivity of 10 passengers per hour.
 - Checkpoint achieved 12.0 rides per hour in FY 2012
 - East Valley achieved 9.3 rides per hour on its flex route
- Demand-response services should have a minimum productivity of five passengers per hour.
 - Curb-to-curb only carried 3.7 rides per hour
- Maximum time between buses for any fixed-route service should be 60 minutes.
- Maximum waiting times for demand-response services for should be less than 30 minutes from the requested time.

5.1 Quality of Service

For the analysis in this section we use quality of service factors related to availability, comfort and convenience. These performance measures are documented in the Transit Capacity and Quality of Service Manual (Kittelson & Associates et.al., 2003), which assigns a Level of Service (LOS) value for each measure. The manual focuses on service coverage to represent availability, and on-time performance to represent comfort and convenience. It includes both fixed route and demand response metrics.

For fixed route, LOS is rated on a scale of A, B, C, D, E, and F, similar to the Highway Capacity Manual levels of service. We recommend non-urban systems should target LOS C, D or E, since a LOS A or B come at a high cost. For HATS fixed route, we have selected a target LOS D.

LOS for demand response is rated on a scale of 1 through 8. For HATS curb-to-curb, we have selected a target LOS 4 which aligns with requirements of the Americans with Disabilities Act and is a realistic target.

Availability: Service Coverage

Table 5-1 shows the levels of service for the percent of area with service.

Table 5-1: Fixed-Route Service Area Coverage LOS and HATS Target

LOS	% TSA Covered	Comments
A	90.0-100.0%	Virtually all major origins & destinations served
B	80.0-89.9%	Most major origins & destinations served
C	70.0-79.9%	About ¾ of higher-density areas served
D	60.0-69.9%	About two-thirds of higher-density areas served
E	50.0-59.9%	At least ½ of the higher-density areas served
F	<50.0%	Less than ½ of higher-density areas served

Transit-Supportive Area (TSA): The portion of the area being analyzed that has a household density of at least 3 units per gross acre (7.5 units per gross hectare) or an employment density of at least 4 jobs per gross acre (10 jobs per gross hectare).

Covered Area: The area within 0.25 mile (400 m) of local bus service or 0.5 mile (800 m) of a busway or rail station, where pedestrian connections to transit are available from the surrounding area.

Target is highlighted in blue; actual is highlighted in green.

We used a planning methodology for calculating the coverage area, drawing a 1/4 mile radius around every bus stop. A more detailed methodology is available to account for street connectivity, grade, proportion of elderly in the population, and ease of pedestrian crossing; but this methodology is too complicated for the scope of this project. Because of limitations in data we made another simplification, considering the entire population within city limits and excluding employment density.

Our findings were:

- 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

Table 5-2 considers availability based on hours of service per day.

Table 5-2: Fixed-Route Hours of Service LOS and HATS Target

LOS	Hours of Service	Comments
A	19-24	Night or “owl” service provided
B	17-18	Late evening service provided
C	14-16	Early evening service provided
D	12-13	Daytime service provided
E	4-11	Peak hour service only or limited midday service
F	0-3	Very limited or no service

Target is highlighted in blue; actual is highlighted in green.

Our findings were:

- Target LOS D: 12-13 hours of service
- Actual LOS E: 11 hours for Checkpoint and 8 hours for East Valley

Availability: Response Time

For demand response, the selected measure of availability is based on the planning time required to secure a ride, and hours per day.

Table 5-3: Response Time LOS and HATS Target for Demand Response

LOS	Response Time	Comments
1	Up to ½ hour	Very prompt response; similar to exclusive-ride taxi service
2	More than ½ hour, and up to 2 hours	Prompt response; considered immediate response for DRT service
3	More than 2 hours, but still same day service	Requires planning, but one can still travel the day the trip is requested
4	24 hours in advance; next day service	Requires some advance planning
5	48 hours in advance	Requires more advance planning than next-day service
6	More than 48 hours in advance, and up to 1 week	Requires advance planning
7	More than 1 week in advance, and up to 2 weeks	Requires considerable advance planning, but may still work for important trips needed soon
8	More than 2 weeks, or not able to accommodate trip	Requires significant advance planning, or service is not available at all

Hours Per Day	Days of Week						
	6-7	5	3 - 4	2	1	0.5*	< 0.5
≥16.0	LOS 1	LOS 2	LOS 4	LOS 5	LOS 6	LOS 7	LOS 8
12.0-15.9	LOS 2	LOS 3	LOS 4	LOS 5	LOS 6	LOS 7	LOS 8
9.0-11.9	LOS 3	LOS 4	LOS 4	LOS 6	LOS 6	LOS 7	LOS 8
4.0-8.9	LOS 5	LOS 5	LOS 5	LOS 6	LOS 7	LOS 7	LOS 8
< 4.0	LOS 6	LOS 6	LOS 6	LOS 7	LOS 8	LOS 8	LOS 8

Target and actual are highlighted in blue.

Helena Curb-to-Curb meets the target value.

- Target and actual LOS 4: 24 hours in advance, 9 to 12 hours per day, 5 days per week

Comfort and Convenience: On-Time Performance

Table 5-4 shows the on-time performance level of service from the Transit Capacity and Quality of Service Manual (Kittelson & Associates et.al., 2003). As noted in the manual, it takes a minimum of 20 observations, typically measured for a route over a series of days. For HATS to achieve LOS D, at least 80% of buses must depart within 5 minutes of scheduled departure time, and no buses should leave early.

Table 5-4: Fixed-Route On-Time Performance LOS

LOS	On-Time Percentage	Comments*
A	95.0-100.0%	1 late transit vehicle every 2 weeks (no transfer)
B	90.0-94.9%	1 late transit vehicle every week (no transfer)
C	85.0-89.9%	3 late transit vehicles every 2 weeks (no transfer)
D	80.0-84.9%	2 late transit vehicles every week (no transfer)
E	75.0-79.9%	1 late transit vehicle every day (with a transfer)
F	<75.0%	1 late transit vehicle at least daily (with a transfer)

NOTE: Applies to routes with a published timetable, particularly to those with headways longer than 10 minutes.
 "On-time" is 0 to 5 minutes late, and can be applied to either arrivals or departures, as appropriate for the situation being measured. Early departures are considered on-time only in locations where no passengers would typically board (e.g., toward the end of a route).
 *Individual's perspective, based on 5 round trips per week.
 Target is highlighted in blue; actual is highlighted in green.

Based on our observations we found that East Valley Bus and Checkpoint fall far short of the target for on-time performance.

- Target 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

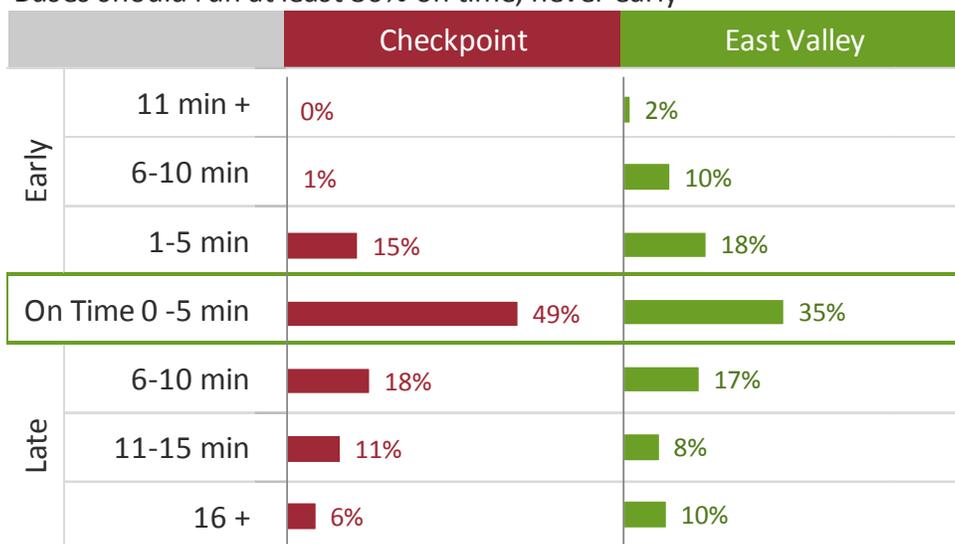


Figure 5-1: Early, on-time, and late arrivals from 11 days in October

For HATS curb to curb service, no data was available to assess the performance measures presented in the two tables below. Since HATS does not use demand response management software, these metrics are too time-consuming to quantify given the project budget.

Table 5-5: Demand Response On-Time Performance LOS

LOS	On-Time Percentage	Comments*
1	97.5-100.0%	1 late trip/month
2	95.0-97.4%	2 late trips/month
3	90.0-94.9%	3-4 late trips/month
4	85.0-89.9%	5-6 late trips/month
5	80.0-84.9%	7-8 late trips/month
6	75.0-79.9%	9-10 late trips/month
7	70.0-74.9%	11-12 late trips/month
8	<70.0%	More than 12 late trips/month

NOTE: Based on 30-minute on-time window.

*Assumes user travels by DRT round trip each weekday for one month, with 20 weekdays/month.

Table 5-6: Demand Response Trips Not Served LOS

LOS	Percent Trips Not Served	Comments*
1	0-1%	No trip denials or missed trips within month
2	>1%-2%	1 denial or missed trip within month
3	>2%-4%	1-2 denials or missed trips within month
4	>4%-6%	2 denials or missed trips within month
5	>6%-8%	3 denials or missed trips within month
6	>8%-10%	4 denials or missed trips within month
7	>10%-12%	5 denials or missed trips within month
8	>12%	More than 5 denials or missed trips within month

Target is highlighted in blue; no data for actual.

5.2 Peer Comparison

Peer systems were selected from the 1,500 entries in the Rural National Transit Database (NTD) based on likeness in at least four of the following characteristics.

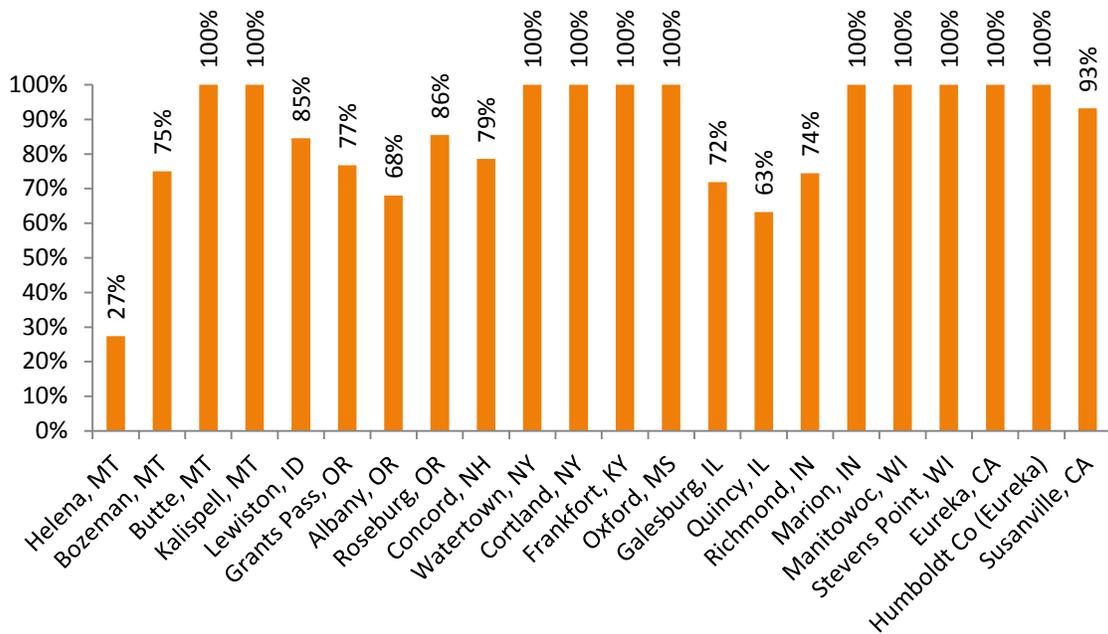
- Population of the micropolitan area among the top 30% most like Helena
- Population of the core city among the top 50% most like Helena.
- Education attainment among the top 25% most like Helena
- Budget among the top 25% most like Helena
- Passengers per hour on fixed route among the top 50% most like Helena
- Cost per ride among the top 20% most like Helena
- Total likeness summing all of the above characteristics among the top 50% most like Helena

Final peer selection was by inspection, eliminating systems that were out of scale from Helena. Twenty-two transit systems in 21 communities were identified. Of the 50 state capitals only Concord and its transit system had enough similarities with Helena to be included in the peer list

For the analysis in this section, we used the latest available data which is from Reporting Year 2010.

Percent Miles in Fixed or Flex Route Service (2010)

Peers operate primarily fixed or flex route

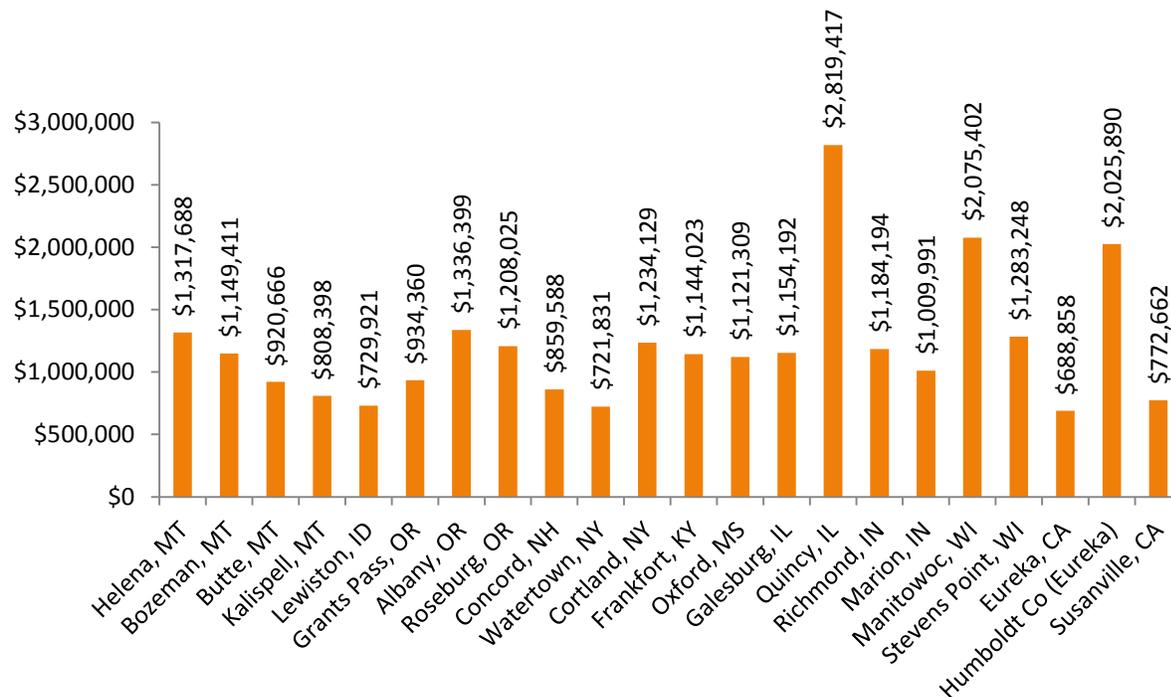


Communities of approximately the same population and transit budget as Helena selected from the rural National Transit Database (NTD). Potential errors and explanation of differences: many communities meet ADA requirements through use of flex routes; some contract ADA paratransit; some may have misreported.

Figure 5-2: Peer comparison of amount of fixed route service

Annual Operating Budget (2010)

Helena’s budget is adequate to provide services comparable to Bozeman and Butte. Many top performing rural systems have much larger budgets than shown in this group.

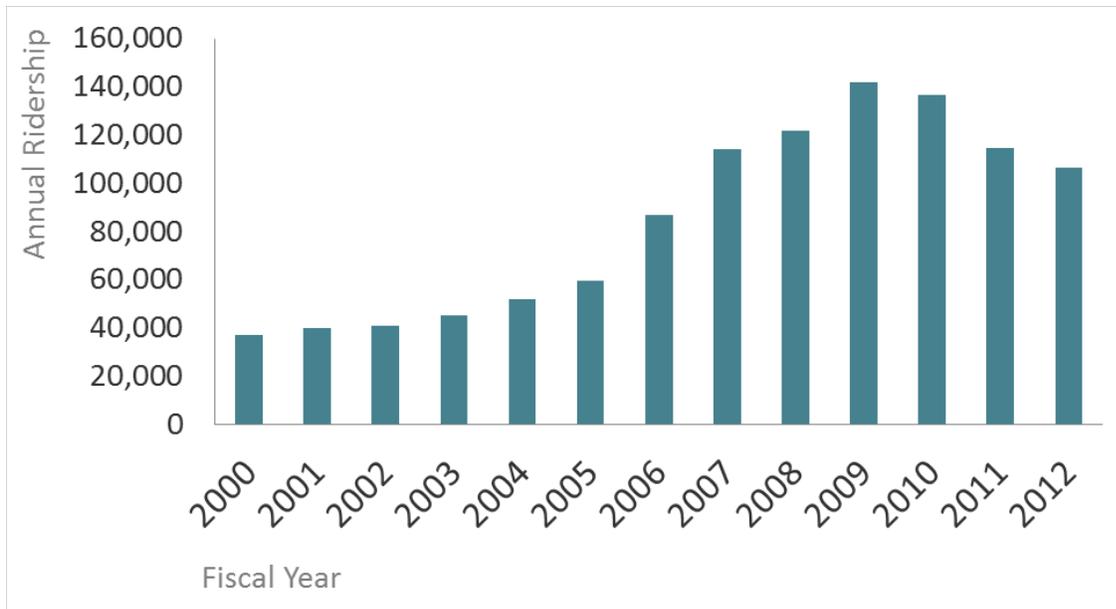


Potential errors, omissions, and explanation of differences: communities of similar size with much larger budgets, such as Port Washington with a \$7.9 million budget, were filtered out of these graphs. California counties often operate countywide service in addition to city services, such as Lewis & Clark peer Humboldt County, where Eureka and Arcata have city services and Humboldt Transit Authority operates county wide.

Figure 5-3: Peer comparison of operating budgets

Ridership over Time

Over the twelve-year period that HATS has used its current system of tracking ridership data, the system has seen fluctuations in the number of riders (Figure 5-4). HATS has seen numbers as low as 40,000 rides per year, and experienced peak ridership in 2009 of about 140,000. This is attributable to the Capital Commuter. Numbers have been steadily decreasing since, attributed to cuts in secondary services rather than loss of ridership on Checkpoint, Curb-to-Curb, and the East Valley route.



Source: HATS ridership records

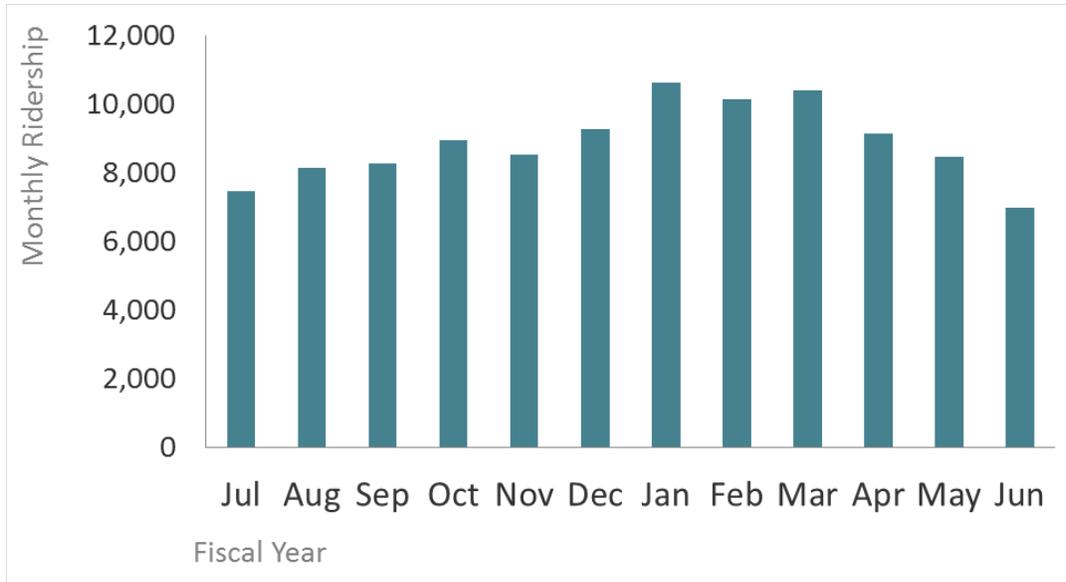
Figure 5-4: Ridership over time

Table 5-7: Annual reported ridership

Fiscal Year	Ridership	% Change	Explanation
2000	37,294		
2001	39,957	7.1%	
2002	40,928	2.4%	
2003	45,176	10.4%	Initiated Advertising with Helena Ad Club.
2004	51,988	15.1%	Added Trolley
2005	59,765	15.0%	
2006	86,661	45.0%	Added East Valley
2007	114,263	31.9%	Added Head Start
2008	122,022	6.8%	
2009	141,926	16.3%	Added Commuter Route/State Employees & HEY Ride
2010	136,306	-4.0%	
2011	116,892	-14.2%	Stopped Commuter Route/Stopped Trolley
2012	107,488	-8.0%	Loss of approximately 2,250 in RMDC & other ridership
Total Rides	1,100,666		

Source: HATS ridership records

Ridership tracked by month for fiscal year 2012 shows heaviest usage of HATS during winter months. This comparison is shown in Figure 5-5



Source: HATS ridership records

Figure 5-5: Ridership by month for FY 2012

Current Year Ridership Characteristics

A review by route of ridership from calendar year 2010 shows that Checkpoint and Curb-to-curb carry the same number of passengers. However, half of the miles are in curb to curb, an indicator of the high cost of this type of service.

Ridership by Route

FY 2012

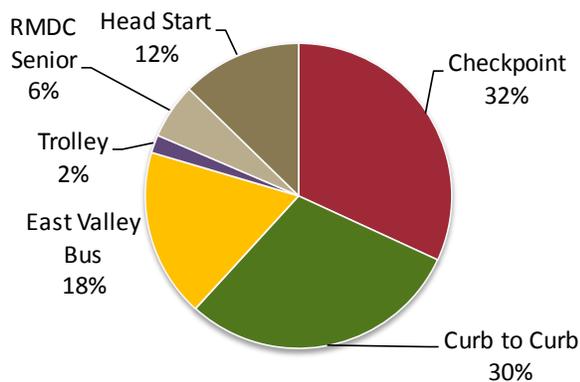


Figure 5-6: Ridership by route, calendar year 2010

Miles by Route

FY 2012

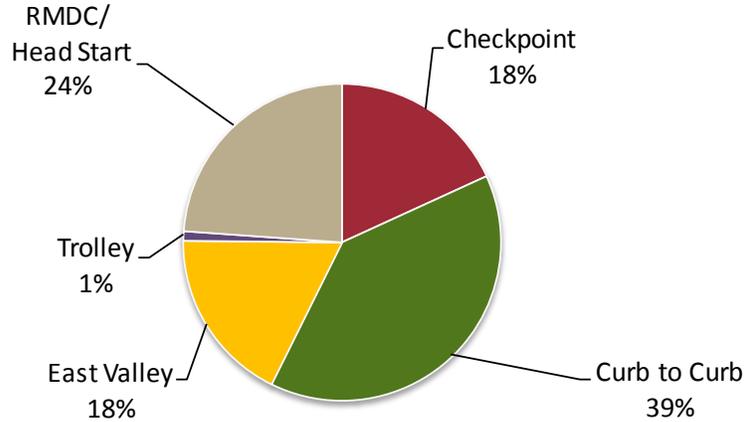


Figure 5-7: Miles by route, calendar year 2010

Figure 5-8 describes boardings by time of day for the Checkpoint route. Data was not available for East Valley or Curb to Curb. Ridership is highest at the beginning of the day the remains constant until the last hour, when people are heading home. Lower ridership in the last hour is typical for most transit services.

Figure 5-9 shows the average number of boardings per day for the Checkpoint route.

Ridership by Time of Day

FY 2012 Checkpoint Daily Average

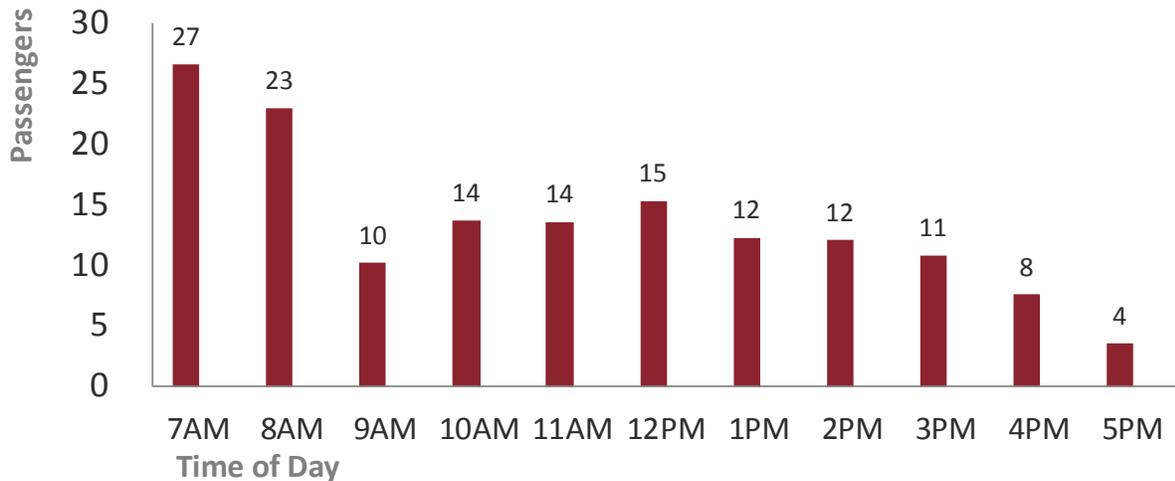
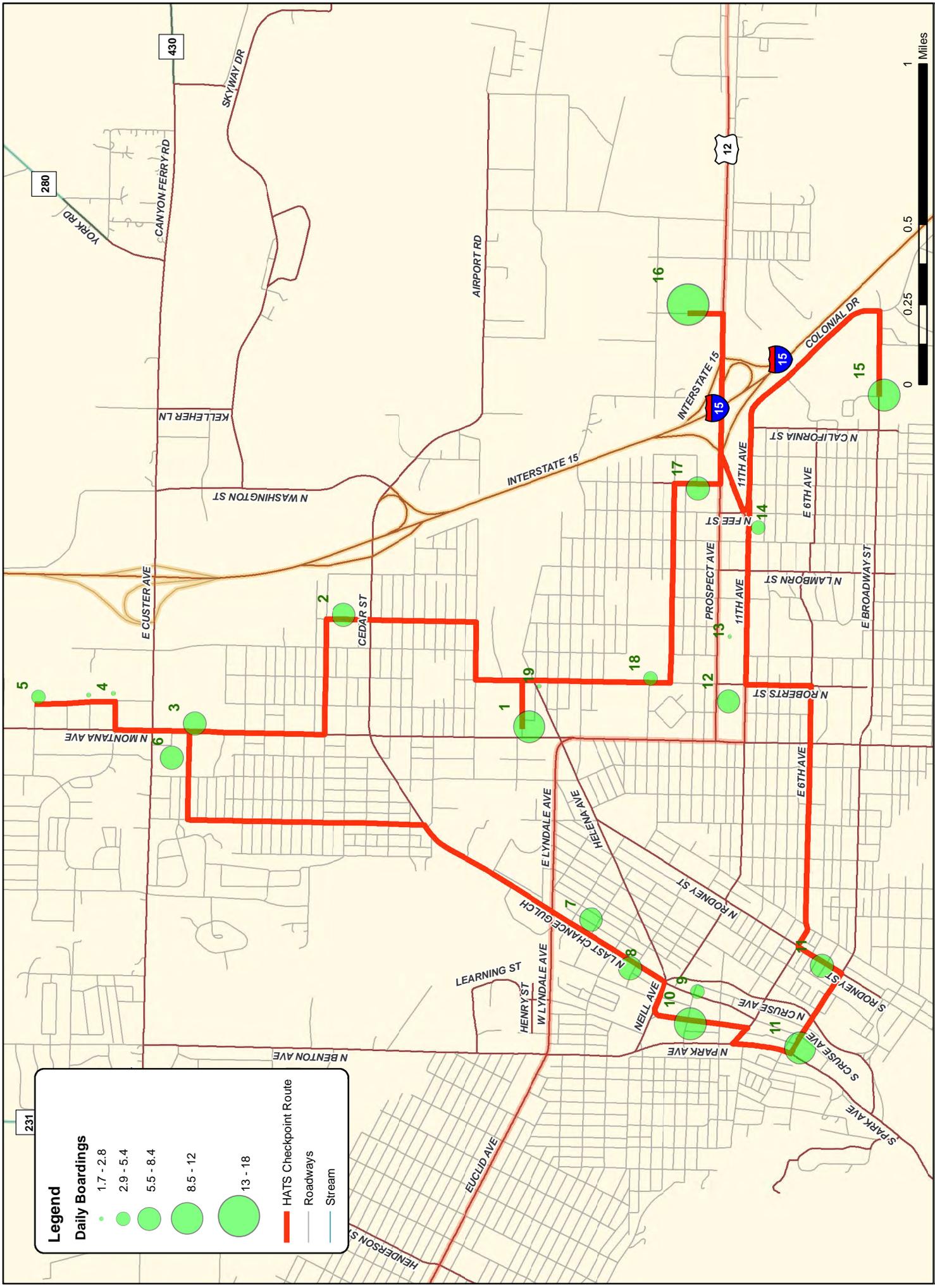


Figure 5-8: Boardings by Hour of Day



Legend

Daily Boardings

- 1.7 - 2.8
- 2.9 - 5.4
- 5.5 - 8.4
- 8.5 - 12
- 13 - 18

— HATS Checkpoint Route

— Roadways

— Stream

Daily Boardings

5.3 Cost and Benefits of Helena Transit

A central issue that HATS needs to address over the next five years is how to balance the costs and benefits of fixed route and demand-response service. In the Maintenance and Operations Review, Steve Earle summarizes this issue with the statement that, “HATS operation of its curb-to-curb service is one of the most liberal we have ever seen for this type of public transportation. While it is a great asset to the community and well used, the drawback is that it has the potential to generate an extremely high cost per ride.” The reality of this statement is illustrated by the numbers in this section and in the peer comparison in Section 5.2. Most transit systems try to limit high cost-per-ride demand response service only to populations that need it, providing lower cost fixed routes to serve the general public. Currently HATS is exceptionally liberal in providing demand-response rides to the general public.

Summary of Costs

The Fiscal Year 2012 HATS budget was \$1.46 million, with HATS reporting to the Montana Department of Transportation \$976,488 operating expenses for its weekday services. Capital expenses associated with the construction of the transit center were \$190,000. Operating expenses for the additional services of RMDC Senior Transportation, Head Start, and the intercity ticket agency was \$275,000. Table 5-8 shows the costs and performance measures for the weekday services.

Table 5-8: FY 2012 Cost Performance Measures

	Operating Cost	Ridership	Miles	Cost per Ride	Cost per Passenger-Mile
Weekday Services					
Helena Bus	\$802,326	66,373	133,421	\$12.09	\$3.78
Checkpoint	\$215,542	34,272	42,240	\$6.29	\$1.97
Curb to Curb	\$586,785	32,101	91,181	\$18.28	\$5.71
East Valley	\$174,162	19,177	41,536	\$9.08	\$1.44
Total	\$976,488	85,550	174,957	\$11.41	\$2.93

Quantified Benefits

Some of the community benefits of transit are much easier to quantify than others. A Wisconsin DOT study (HDR/ HLB Decision Economics, 2006) calculated values for the socio-economic benefits of different types of trips as shown below. Originally calculated in 2002 dollars we adjusted to 2012 dollars per the Consumer Price Index (CPI). Applying these values to HATS weekday ridership and trip purposes, we have conservatively estimated that HATS provides \$1.4 million of quantified socio-economic benefits to the Helena area as well as non-quantified benefits.

Work related trips: \$8.98 per trip (based on the percent of Wisconsin riders who stated they would not make the trip without transit, and the cost of providing social services to that group, adjusted to 2012 dollars)

Service trips (shopping, recreation): \$8.02 per trip (based on economic benefit to businesses)

Education: \$5.16 per trip (based on the aggregated cost of the alternative mode of transportation)

Medical: \$23.71 per trip (based on the alternative of providing home health care)

Average benefit of a transit trip in Wisconsin: \$9.44

Applied to HATS ridership: \$1.4 million socio-economic benefit (2012 dollars)

Qualitative Benefits

Quality transit services in small cities such as Helena provide additional benefits that we did not attempt to quantify. Table 5-9 lists all categories of benefits recommended for consideration in a comprehensive cost-benefit assessment (Victoria Transport Policy Institute, 2009). Some of these benefits could be quantified: double underlined benefits are included in the Wisconsin study and our quantitative assessment of HATS socio-economic benefits. The remaining items are benefits of a robust small-city transit system that we did not include in our quantitative benefit calculation for HATS.

This consideration of costs and benefits differs from the typical transportation engineering approach, which limits its quantification of benefits to congestion mitigation. As described by Cambridge Systematics:

“Traditional approaches used to measure and value transit benefits and disbenefits [i.e. costs] do not fully reflect all commitments made concerning, or all expectations of transit service facilities. The most pronounced shortcoming in traditional analysis is the inability to quantify the full range of transit benefits that are referenced in policy and goal statements and intuitively sensed by citizens, as well as by many planners and decision makers.”

Table 5-9: Description of potential benefits for quality transit
(Victoria Transport Policy Institute, 2009)

Impact Category	Description
Mobility Benefits	<i>Benefits from increased travel that would not otherwise occur.</i>
Direct User Benefits	<u>Direct benefits to users from increased mobility.</u>
Public Services	<u>Support for public services and cost savings for government agencies.</u>
Productivity	Increased productivity from improved access to education and jobs.
Equity	Improved mobility that makes people who are also economically, socially or physically disadvantaged relatively better off.
Option Value/ Emergency Response	Benefits of having mobility options available, in case they are ever needed, including the ability to evacuate and deliver resources during emergencies.
Efficiency Benefits	<i>Benefits from reduced motor vehicle traffic.</i>
Vehicle Costs	<u>Changes in vehicle ownership, operating and residential parking costs.</u>
Chauffeuring	Reduced chauffeuring responsibilities by drivers for non-drivers.
Vehicle Delays	Reduced motor vehicle traffic congestion.
Pedestrian Delays	Reduced traffic delay to pedestrians.
Parking Costs	Reduced parking problems and non-residential parking facility costs.
Safety, Security and Health	Changes in crash costs, personal security and improved health and fitness due to increased walking and cycling.
Roadway Costs	Changes in roadway construction, maintenance and traffic service costs.
Energy and Emissions	Changes in energy consumption, air, noise and water pollution.
Travel Time Impacts	Changes in transit users' travel time costs.
Land Use	<i>Benefits from changes in land use patterns.</i>
Transportation Land	Changes in the amount of land needed for roads and parking facilities.
Land Use Objectives	Supports land use objectives such as infill, efficient public services, clustering, accessibility, land use mix, and preservation of ecological and social resources.
Economic Development	<i>Benefits from increased economic productivity and employment.</i>
Direct	Jobs and business activity created by transit expenditures.
Shifted expenditures	Increased regional economic activity due to shifts in consumer expenditures to goods with greater regional employment multipliers.
Agglomeration Economies	Productivity gains due to more clustered, accessible land use patterns.
Transportation Efficiencies	More efficient transport system due to economies of scale in transit service, more accessible land use patterns, and reduced automobile dependency.
Land Value Impacts	Higher property values in areas served by public transit.

6 Other Providers

HATS is the provider of general public transportation in the Helena area. Other organizations providing transportation, either in conjunction with or apart from HATS, are described in the following sections.

6.1 Human Service Transportation Providers

Rocky Mountain Development Council (RMDC)

Rocky Mountain Development Council, Inc. (RMDC), a Community Action Agency created under the Economic Opportunity Act of 1964, has been providing transportation services for their senior program clientele since 1986. The RMDC buses pick up clients Monday through Friday at their homes and take them to and from various functions. RMDC also operates the Head Start Bus program, with buses and drivers hired by the City of Helena, to transport pre-school children Monday through Thursday during the school year. (City of Helena, 2011)

Spring Meadow Resources

Spring Meadow Resources, an agency that serves adults with developmental disabilities, provides client transportation to the Spring Meadow Resources Day Center and Helena Industries as well as to shopping, recreation, social activities, and medical providers. (City of Helena, 2011)

West Mont Habilitation Services, INC.

West Mont Habilitation Services, an agency of West Mont, provides transportation for persons with developmental disabilities who live in one of seven group homes or who attending day-training workshops. The transportation services also provide West Mont's clients access to work, social, medical, and recreational/shopping opportunities in the community. Transportation is available on demand, 24 hours per day, seven days per week. West Mont Habilitation Services also utilizes HATS buses. (City of Helena, 2011)

6.2 Intercity Bus

As of this writing, Helena has no intercity bus service, and it is unknown if a carrier will pick up routes operated by Rimrock Trailways prior to March 26, 2013. On April 4, 2013, SLE began running one roundtrip route a day from Billings to Missoula through Helena, cancelled on July 5. Starting April 15th, the Rexburg, Idaho based business began bus service in and out of Great Falls twice a day with one shuttle going to Helena and the other passing through Helena and connecting on to Butte. One of these runs was cancelled July 5, and the other was cancelled August 21. On March 30 Jefferson Lines began two round trips from Billings through Butte to Missoula and extended its Glendive run from Fargo on into Billings. This remains in operation.

In combination, Salt Lake Express and Jefferson were able to restore most of Montana and North Dakota intercity bus service previously offered by Rimrock Stages until March 22, 2013 when Federal Motor Carrier Safety Administration (FMCSA) inspectors shut down the Billings-based Rimrock Stages bus fleet. US 93 from Missoula to Kalispell, and I-94 between Glendive and Bismarck remain without service.

Montana's private intercity bus operators connect to other services linking to the rest of the country. In spite of the remoteness and low population density of Montana, the routes hold national significance because they carry people across the country along one of only four cross-country corridors. Along with two public transportation operators on the high line, they also allow Montanans to connect to communities both within Montana and outside the state.

In summary, intercity providers usually operate on the following corridors that start or pass through Montana:

- The corridor between Missoula and Billings usually is served with three round trips a day. Two round trips run on I-90 through Butte. The third round trip passes through Helena. Two of the three routes are currently being operated by Jefferson Lines
- Greyhound operates two round trips connecting Missoula to Seattle.
- Jefferson Lines runs one round trips a day between Billings and Fargo, snaking between I-94 and US 2 through Miles City, Glendive, Sidney, Williston, Bismarck, and Fargo.
- There currently is no intercity service on US 93 between Missoula and Whitefish
- Usually an intercity operator will run one round trip a day on I-15 between Butte and Great Falls, and a second round trip between Great Falls and Helena with timed connections to Missoula, Bozeman, Billings, and points beyond. These routes are no longer in service.
- North Central Transit travels between Fort Belknap and Great Falls via Havre on Tuesdays and Thursdays
- Northern Transit Interlocal runs one round trip a day between Shelby and Kalispell on Tuesdays and Wednesdays
- Northern Transit Interlocal operates two round trips a day between Shelby and Great Falls on Monday and Thursday
- Salt Lake Express runs two round trips a day on I-15 between Butte and Salt Lake City via Idaho Falls
- Arrow/Black Hills Stage Lines runs twice a day between Billings and Denver. One route runs through Lovell. The other route runs through Sheridan, Wyoming

Greyhound, Salt Lake Express, Arrow/Black Hills Stage Lines, and Jefferson operate 365 days a year and are interlined.

6.3 Other Modes

Charter Bus Service

G & L Transit is a charter bus company based out of Helena/Lewis and Clark County and Butte. G & L serves the continental United States from the two base locations. Its major clients are the U.S. Government (military personnel in particular) and the State of Montana. Other than a fixed schedule service for local government adult special needs clients, its service is available 24 hours per day and 7 days per week. (City of Helena, 2011)

Taxi Service

Capitol Taxi (formerly Old Trapper Taxi) is the sole taxi company operating in the Helena Valley. Capitol Taxi provides door-to-door service on demand, 24 hours per day, 365 days per year. Its service area is within a 50-mile road radius from the Federal Building in downtown Helena. Capitol Taxi reported in a letter to the Helena City Commission approximately 40 to 60 trips per day, including work trips, trips for elderly/disabled, and service to the airport. Capitol Taxi has reported to the Helena Area Transportation Advisory Committee 80 to 100 rides for 2013 and 2012, and 160 to 175 rides in 2011.

Helena Area Regional Airport

The Helena Area Regional Airport is located within the City of Helena, in the community's northeast corner, three miles from the HATS Transit Center. Passenger service is provided by regional airlines services such as Horizon/Alaska Airlines, Skywest/Delta and United Express with approximately 424 seats available for departing air traffic each day. Air passenger and air freight traffic have been steady for several years. The airport is governed by the Airport Authority Board, made up of members appointed by the City of Helena and Lewis and Clark County commissioners. (City of Helena, 2011) HATS does not provide airport service.

Non-Motorized Transportation

Walking and biking information for current HATS riders was collected through the rider survey is summarized in Section 7.2. It 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 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.

7 Public & Stakeholder Perspectives

The public involvement strategy for the Helena Area Transit Service (HATS) Transit Development Plan (TDP) had two overarching goals; to

- conduct an open planning process to make the public aware that HATS was looking at all aspects of transit operations in an effort to improve service, and
- gather input from riders, key stakeholders, and members of the public in order to prepare a high quality plan that fairly represents the current situation and lays the foundation for continued transit success in the greater Helena area.

A number of activities were implemented in order to meet these goals, including key stakeholder interviews, a broader stakeholder roundtable, rider surveys, a community survey, driver interviews, a public open house, and posting of project information on a website. A variety of tools were used to reach interested community members:

- HATS placed advertisements and notices on the outside of their buses, onboard, at the transit center, at the City of Helena web site, in the newspaper, and at human service offices.
- Television and newspaper articles were used several times during the planning process to help keep the public informed. News releases generally were issued prior to public meetings and public hearings to generate interest in the process and to encourage participation by the public. Our outreach to the media resulted in several TV and newspaper stories.
- A project website, helenabusplan.com, was created to make information available to the public, to allow for comment and participation in the community survey, and to enable the public to stay abreast of the developments occurring during the planning process.
- Stakeholders were encouraged to reach out to their constituencies. Montana Independent Living Project took special effort to outreach to its participants, as did the Retired Service Volunteer Program.
- Volunteers set up information tables at two community events.

The outreach and public participation process resulted in strong community participation.

- 412 people completed the community survey.
- 256 HATS riders completed on-board surveys, representing everyone who rode during the surveying days who was willing to participate.
- Approximately 60 community members attended a stakeholder roundtable
- Approximately 40 people attended the HATS TDP open house
- 32 people participated in-depth one-on-one community stakeholder interviews
- All 12 HATS staff members were interviewed

Overall, the themes of the comments and the information we gathered were consistent across all of our outreach including the on-board survey, comments from the drivers, and the community survey, public meetings and interviews.

Based upon stakeholder eagerness to be interviewed, key responses to the questionnaire, depth and breadth of the discussions, event participation and positive feedback, we believe there is the potential to build a solid level of support for improving HATS service and funding. During the interviews, no one shared strong resistance or pessimistic views for the chances of success for HATS to improve and/or expand existing services. This gives HATS an opportunity for continued engagement and support from community leaders.

7.1 Key Stakeholder Interviews

32 in-depth one-on-one community stakeholder interviews were conducted from November 2012 thru February 2013. The primary goals of the key stakeholder interviews were to assess general knowledge of HATS, tap into that knowledge base for some general guidance and gauge willingness to get involved moving forward. Interviewees included business leaders, education leaders, user group leaders, local elected officials and others with local political and transportation-related issue knowledge and experience. 24 of these interviews were conducted by Elizabeth Andrews, Senior Consultant with M+R Strategic Services. Mathew Cramer, an Americorps VISTA for the SAVE Foundation, was recruited and briefed by M+R Strategic Services to conduct 8 additional interviews that were recommended by M+R to be completed prior to the finalization of the HATS TDP.

Topline findings from interviews and recommendations for continued engagement of stakeholders were tracked and summarized (Appendix B). All interviewed expressed an interest in continued communications about the HATS TDP process and implementation activities, most attended the key stakeholder roundtable discussion, many volunteered to help distribute the TDP Community Surveys and/or the link to the survey to the constituents they serve and several offered to provide a link to the community survey in their respective newsletter.

7.2 Rider Survey

Rider surveys were conducted on October 11-12 onboard the Checkpoint and East Valley routes as well as the curb to curb buses and drivers continued to collect surveys on the curb-to-curb bus after this date. Team members, HATS staff, and community volunteers were assigned to portions of each route, riding the buses and asking riders to complete the survey. Survey questions evaluated HATS' performance and offered riders opportunities to write comments and suggestions for improving the service. Many of the survey questions were designed to collect data specific to each run on each route. Therefore, riders who rode multiple times on one or both days may have been asked to fill out the survey multiple times.

As shown in Figure 7-1: a total of 216 surveys were collected, with the largest number collected on the Checkpoint route. This section analyses the survey response as they relate to demographics, trip purpose, information availability and logistics, and rider needs. Overall, the survey showed that currently HATS is primarily serving transportation disadvantaged populations who have few other transportation options because they can't drive or don't have access to a personal vehicle. Riders are very grateful for HATS and driver courtesy received the highest ratings. Riders are least satisfied with on time performance and frequency. The survey results indicate that important strategies for increasing

ridership include increasing service, improving on-time performance and installing benches and shelters at bus stops.

Detailed information about survey responses is included in Appendix C. In the figures below, “N” is the number of responses for the particular question.

Responses by Route

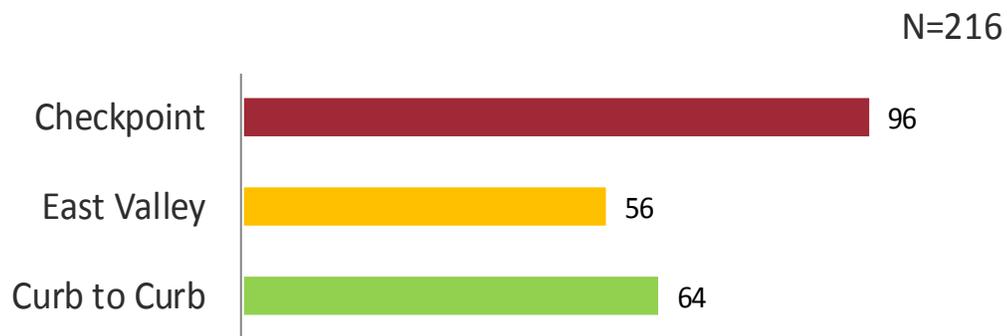


Figure 7-1: Survey Responses by Route

Demographics

Based on survey responses, HATS riders’ age and gender matches the larger community’s demographics but income is lower.

Gender

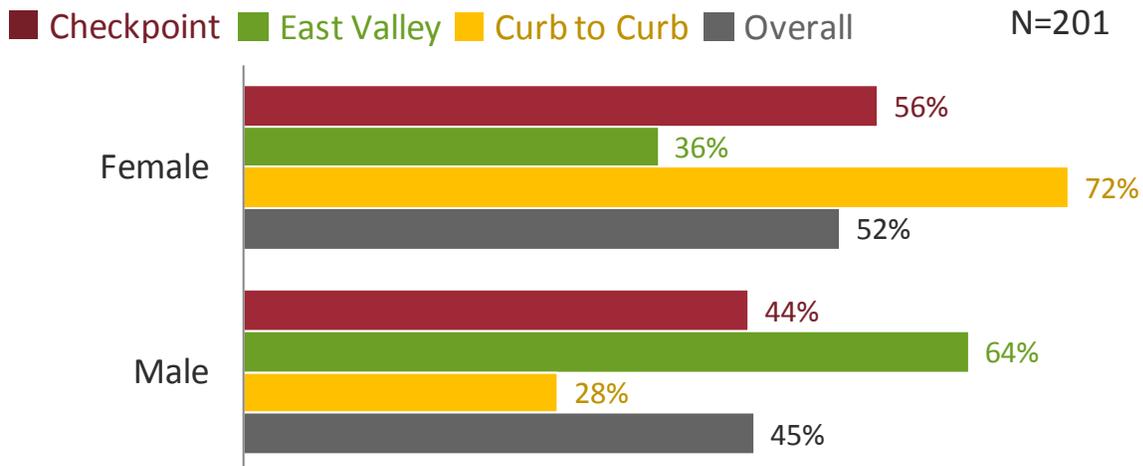


Figure 7-2: Gender of riders

Of riders surveyed, overall 54% of respondents were female, however male/female ratios varied significantly by route and type of service. East Valley, which serves the Helena Prerelease Center for adult men, has the highest use by men. The curb to curb serves predominately women.

Age

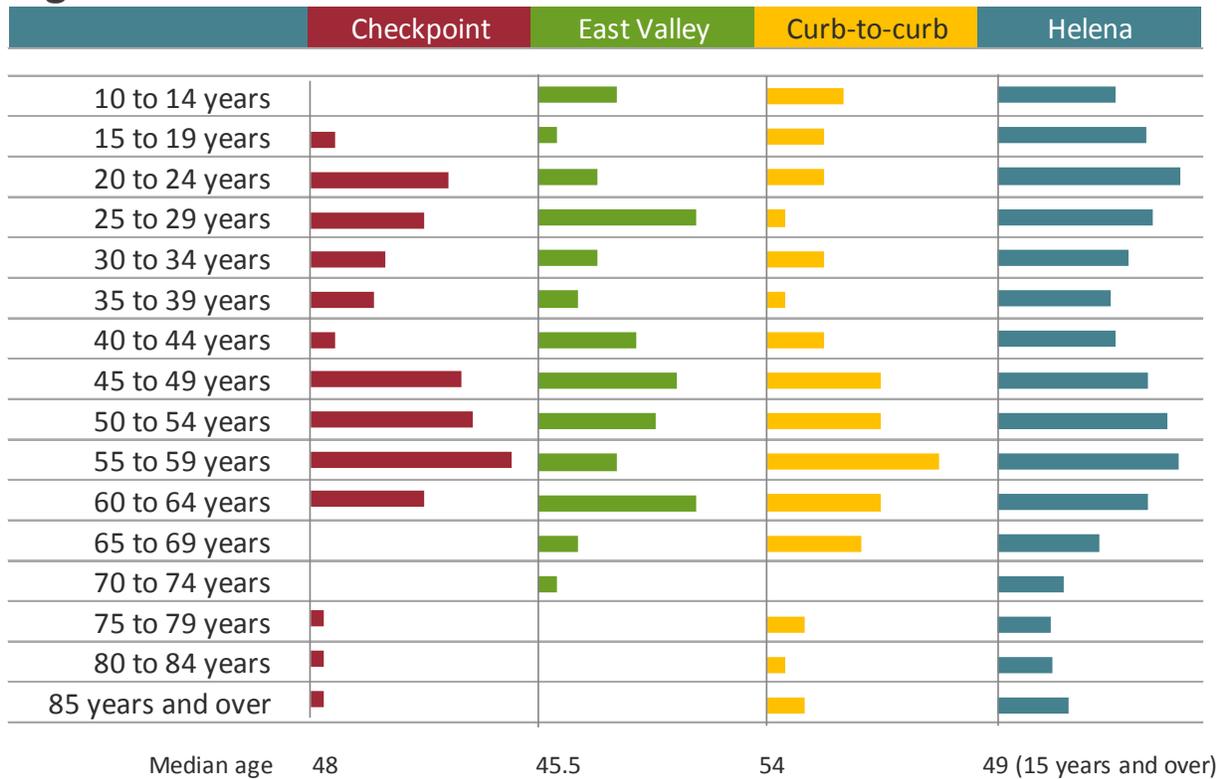


Figure 7-3: Age of riders

Overall, the largest group of riders was between the ages of 45 and 64. Ridership age demographics generally tracked Helena’s age demographics with the notable exception that very few seniors are riding the fixed routes. Identifying issues concerning ridership by seniors would require additional in-depth research and targeted outreach that is beyond the scope of this study. However, the lack of benches and shelters at bus stops is one likely reason for low ridership by seniors.

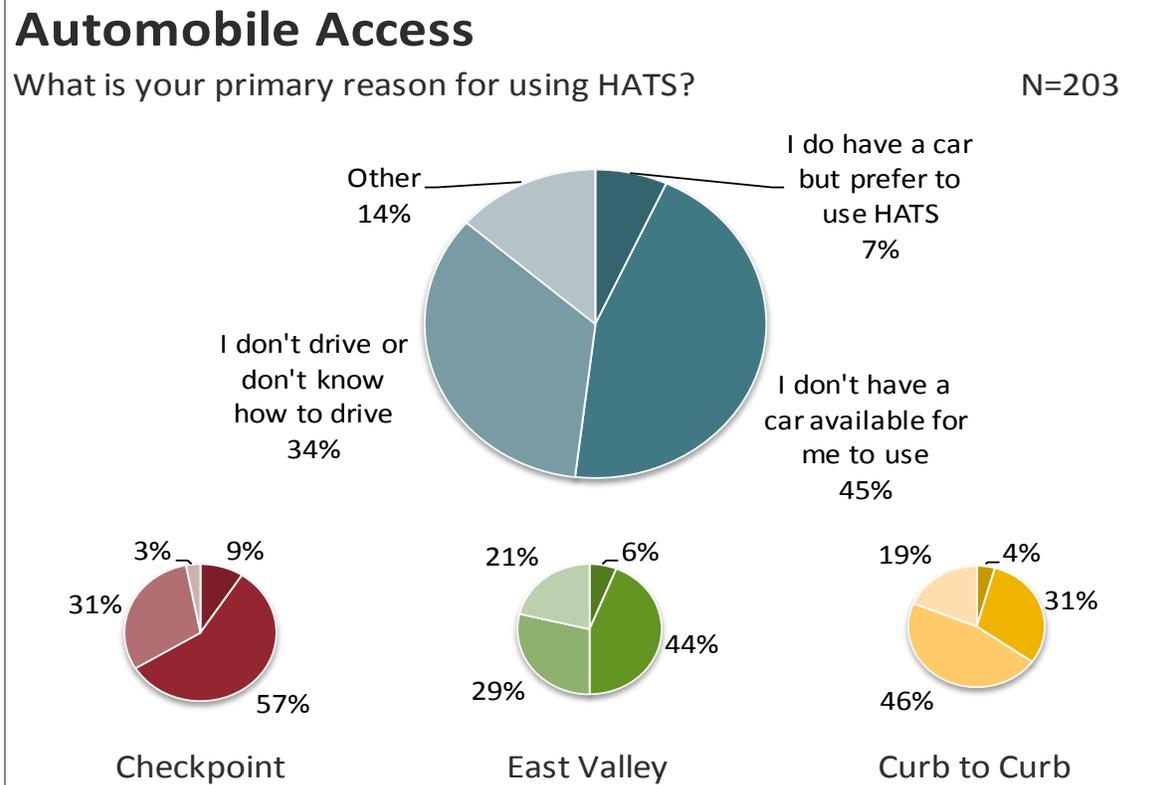


Figure 7-4: Reason for riding HATS

More than any other question in the on-board survey, riders' responses concerning their primary reason for riding HATS provide the clearest picture of the populations HATS is currently serving and the "safety net" nature of that service. Only 7% are "choice riders" who prefer to use HATS even though they have a car. At least 79% don't have a car available or can't drive, even though Figure 7-3 shows that most would be of legal age to obtain a driver's license. Of the 14% indicating their reason for riding the bus was "other", those who gave detail on that response gave a variety of reasons. Health issues and disabilities were the leading reason followed by legal issues. Other reasons included the cost of gas and a car that needed to be repaired.

Options

If bus service were not available, how would you make this kind of trip?

■ Checkpoint
 ■ East Valley
 ■ Curb to Curb
 ■ Overall
 N=212

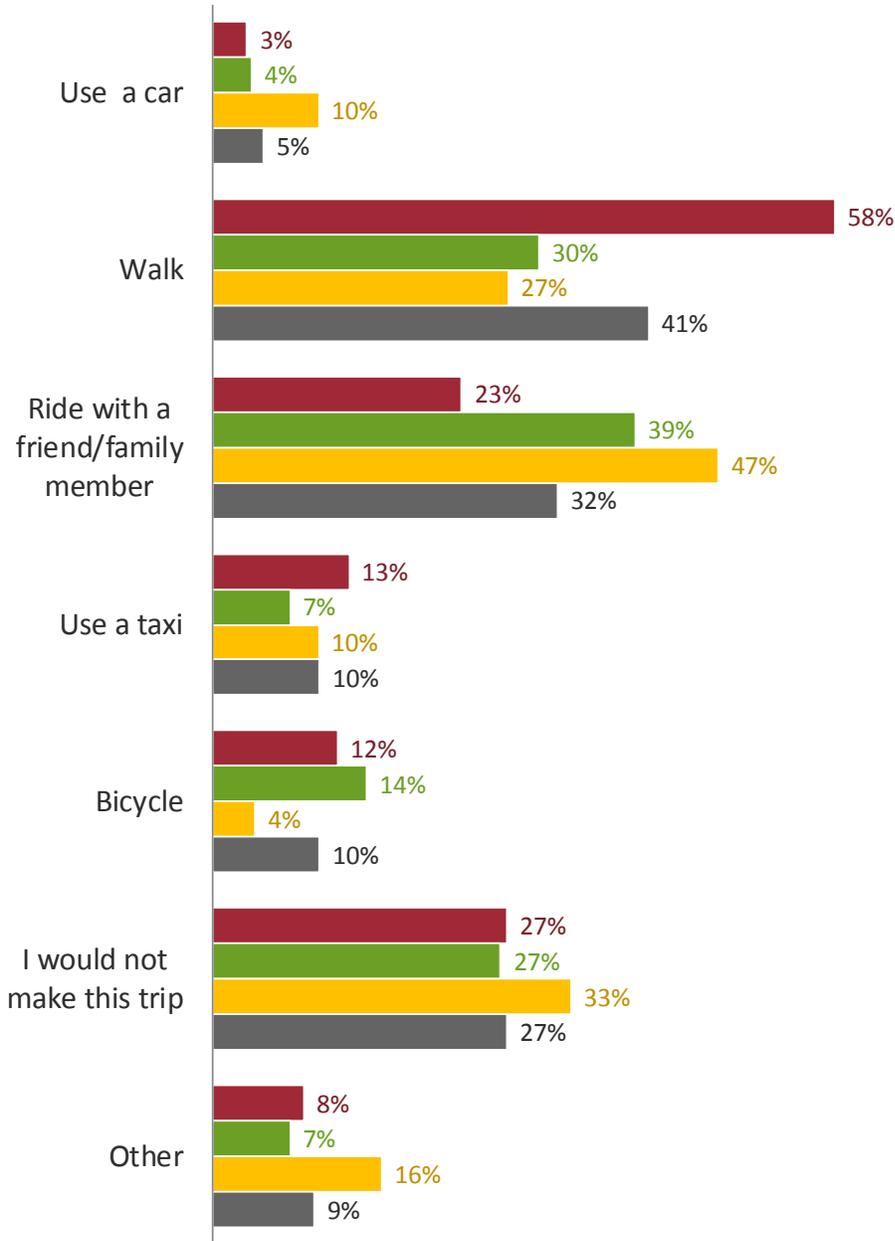


Figure 7-5: How riders would make their trip if HATS were not available

When asked how they would make their trip if HATS were not available, overall only a small percentage would drive a personal vehicle (5%). A significant percentage had no other option and would not be able to make the trip (27%). By far the highest percentages would walk (41%) or ride with a friend or family member (32%). These answers further illustrate that currently HATS is primarily providing a “safety net” service for transportation disadvantaged populations.

Trip Purpose

What best describes the purpose of this trip?

■ Checkpoint
 ■ East Valley
 ■ Curb to Curb
 ■ Overall
 N=200

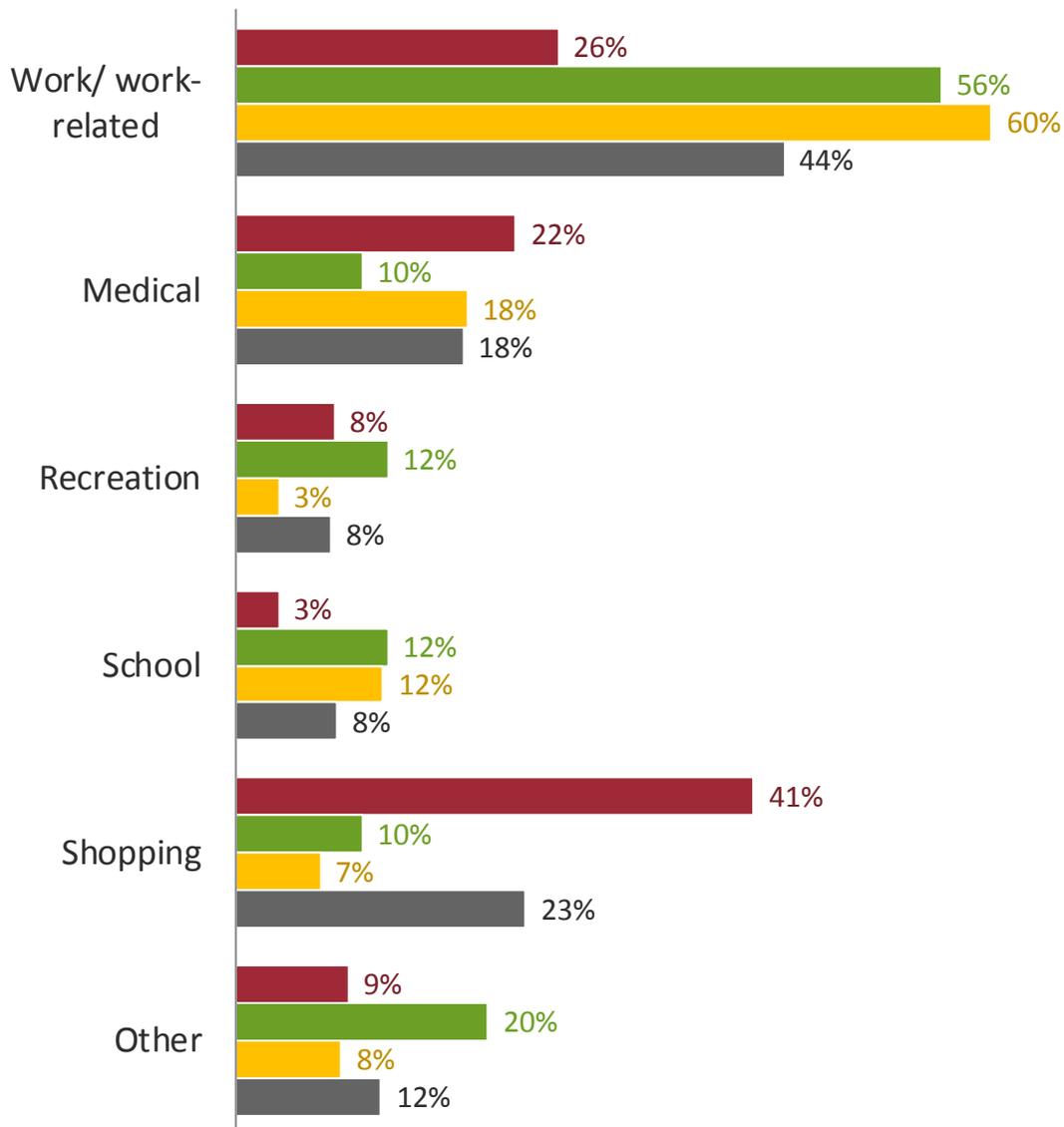


Figure 7-6: Trip Purpose

Riders were asked to choose from a list of options which one best described the purpose of their trip. While there was significant variation between services, overall most riders were using HATS to access work, shopping and medical services with work-related trips accounting for nearly half of all trips. The Checkpoint fixed route was the only service on which the majority of trips were not work-related, with shopping generating the largest number of trips.

Affiliation

What best describes your current status?

■ Checkpoint
 ■ East Valley
 ■ Curb to Curb
 ■ Overall
 N=181

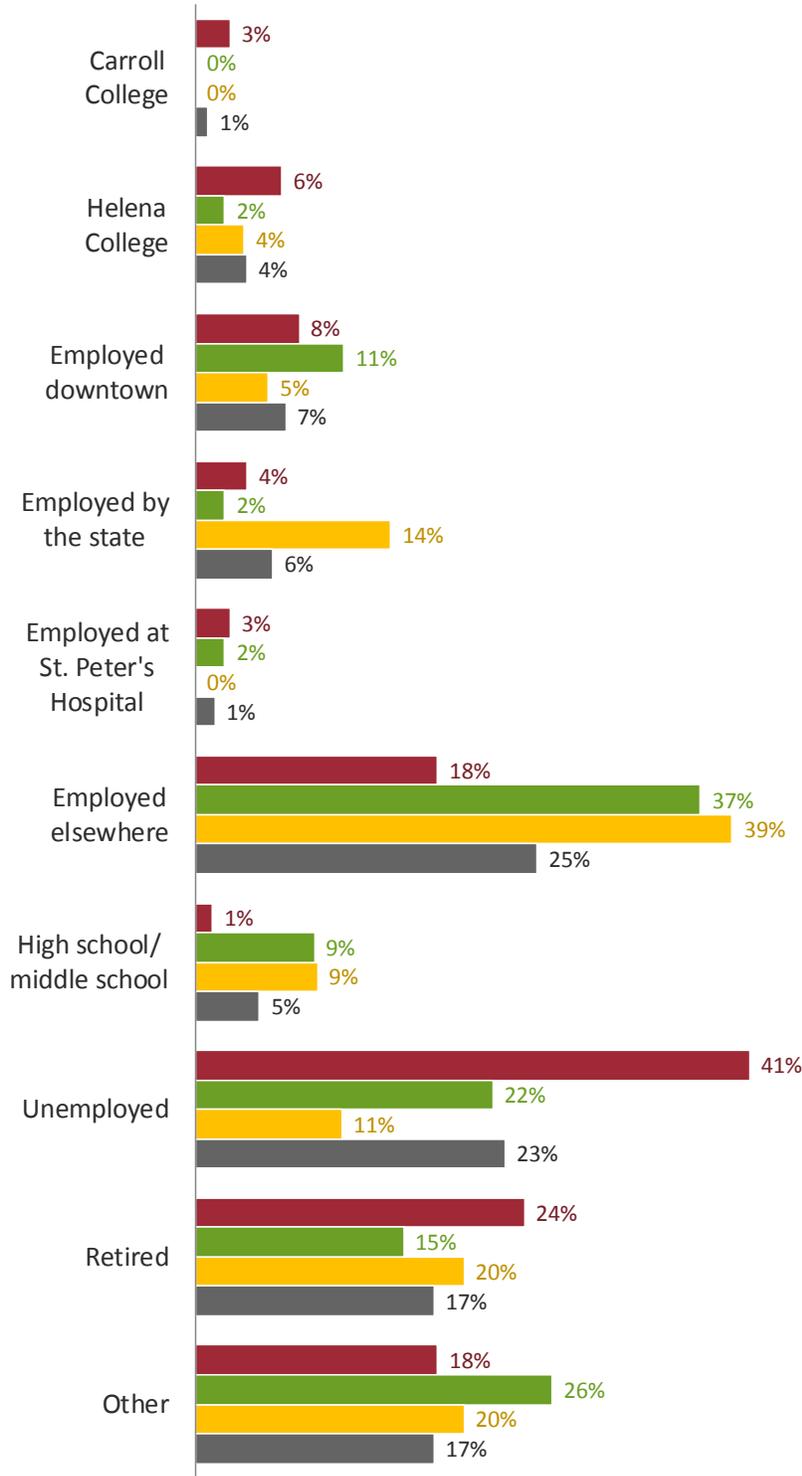


Figure 7-7: Employment Status

Riders were asked to choose from a list of options which one best described their current employment status. Overall, 40% were unemployed or retired, 39% were employed and 10% were students. Of the 17% who chose “other”, the majority who provided additional information indicated that they were disabled.

Among employed riders, no large employers stood out as significant trip generators. The number of state employees and downtown employees were both relatively low, although 14% of curb-to-curb riders identified themselves as state employees.

Half of student riders were college students and half attended middle or high school. Ridership by Carroll College students was particularly low, totaling only 1% overall.

There was significant variation between services. Checkpoint has by far the highest percentage of unemployed riders (41%), and the highest percentages of retired riders (24%) and college students (9%). East Valley had the lowest percentage of retired riders (15%), state employees (2%), and college students (2%); and the highest percentages of downtown employees (11%) and riders who chose “other” (26%). Curb-to-curb had the highest percentage of employed riders (58%) including the highest percentages of state employees (14%) and riders who said they were employed “elsewhere” (39%); it also had by far the lowest percentage who selected “unemployed” (11%) and the lowest percentage of downtown employees (5%).

Table 7-1: Rider estimates of number of trips per week

Trips per Week

How many trips do you typically take on HATS?

	<i>Checkpoint</i>	<i>East Valley</i>	<i>Curb-to-Curb</i>	<i>Overall</i>
Median	7	8	6	6
Mean	7.66	6.73	6.40	7.13
Mode	4	10	10	10
Standard Deviation	5.07	3.58	3.70	4.43
Minimum	1	1	1	1
Maximum	25	15	20	25
Count	89	55	58	225

Riders were asked to estimate their average number of weekly trips. The instructions defined a “trip” as going from a starting point to a destination, so a round trip from home to shopping then back home would count as two trips. Overall the median number of trips per week was six. This statistic allows for a rough calculation of the median number of different individuals riding each service - take the total rides per week and divide by six.

In statistics “Mode” is the value that appears most often in a set of data. For East Valley and Curb-to-Curb the most common response to this question was 10, indicating that a significant number of riders use the service every day. For Checkpoint the most common response was 4, indicating a lower percentage of daily commuters.

Note there is strong bias in this calculation, since people tend to be inaccurate in their estimates. Also, many people do not follow the directions and count a round trip as one trip instead of two trips.

Logistics

Riders were also asked several questions concerning how they accessed information to plan their trip and how they accessed the bus.

Information

Where did you look up schedule information for your trip?

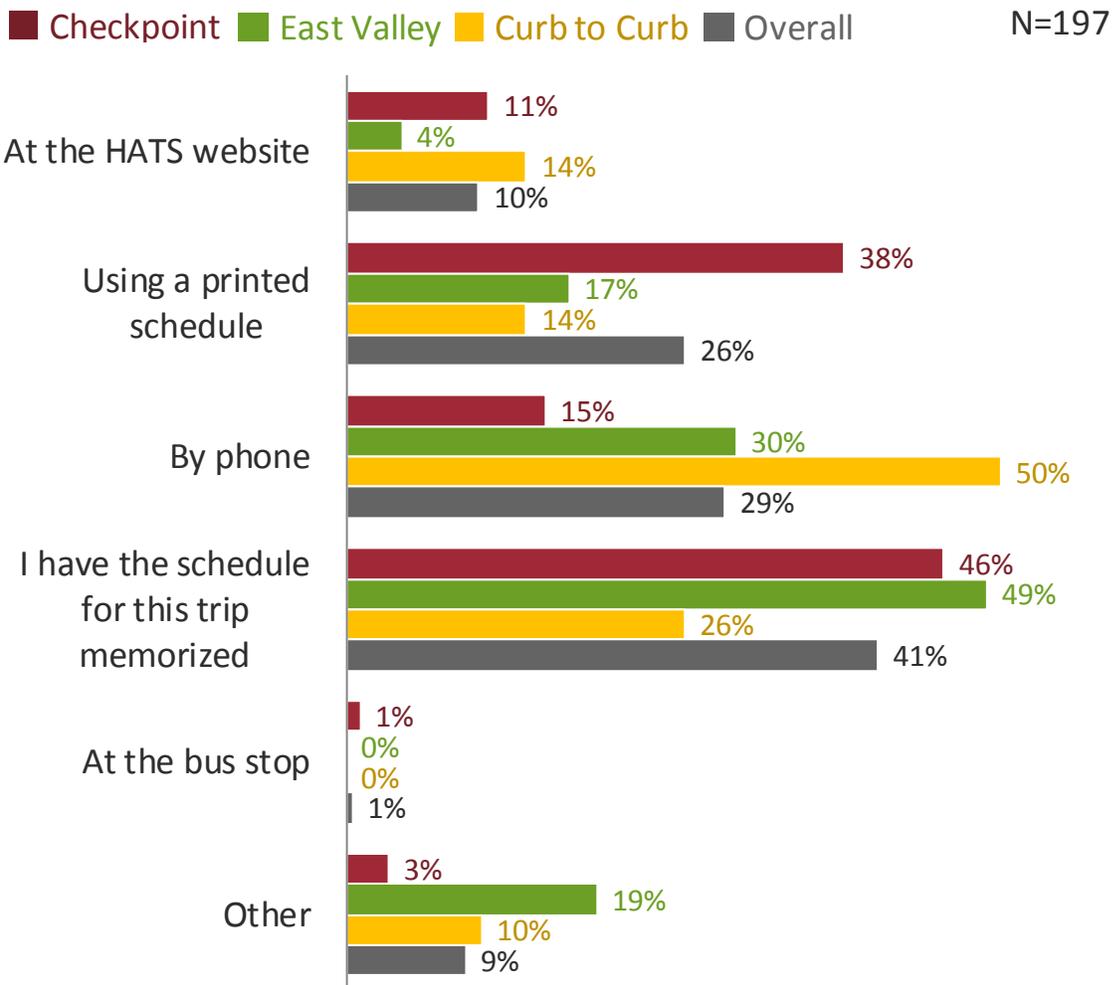


Figure 7-8: How riders accessed schedule information

Overall, most riders who researched schedule information for their trip either phoned HATS (29%) or used a printed schedule (26%). Only a small percentage used the HATS website (10%), and almost no riders used information posted at bus stops (1%). These results also give a good indication that a large percentage of riders use the service on a regular basis – reflected by the fact that 41% have the schedule memorized.

Access to/from the Bus

How did you get to the stop where you got on/off the bus?

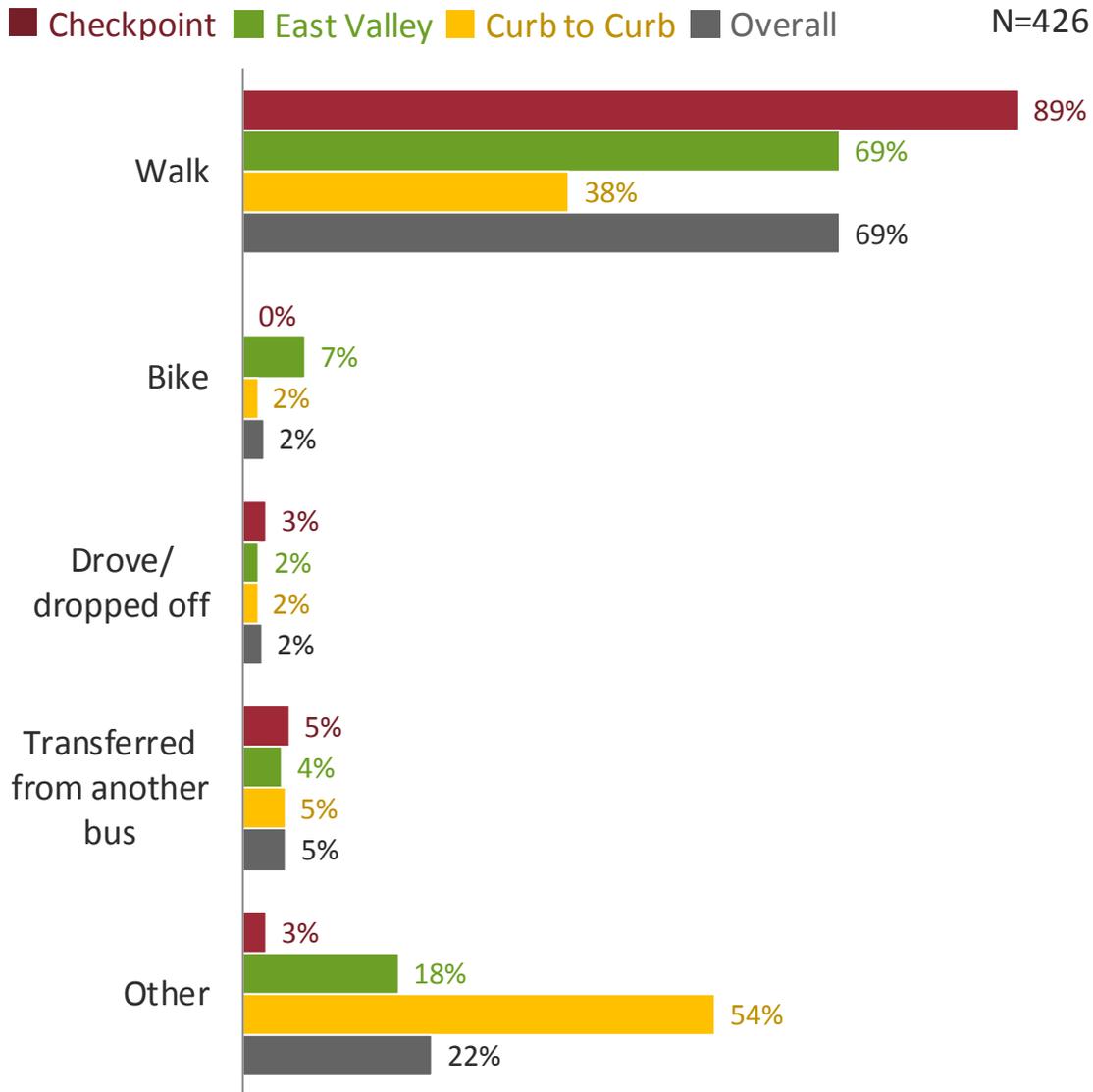
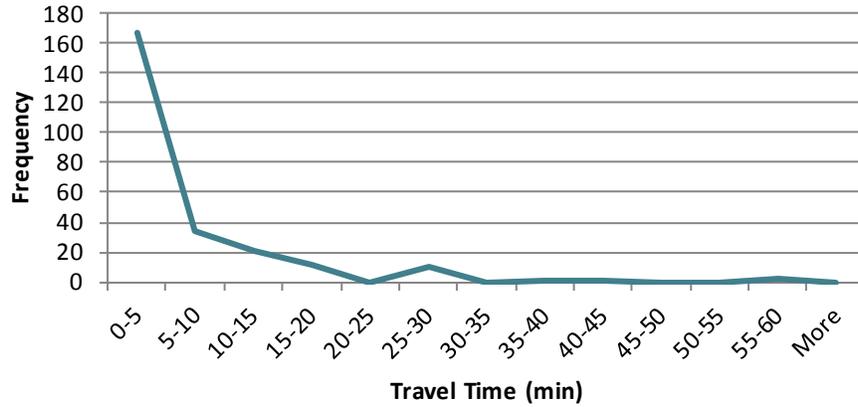


Figure 7-9: How Riders accessed the bus

Overwhelmingly, fixed route riders indicated that they walked to access the bus. Most curb-to-curb riders indicated that they walked or under “other” they wrote that they were picked up at the curb.

Walking time to/from stop



<i>Travel Time in Minutes (Walking)</i>				
	Checkpoint	Curb-to-Curb	East Valley	Overall
Mean	7.5	4.1	7.6	7.3
Median	5	1	5	5
Standard Deviation	9.4	7.6	7.6	8.8
Minimum	0	0	0	0
Maximum	60	40	30	60
Count	144	37	71	284

Figure 7-10: Travel time to access the bus

Travel time to the bus was minimal for the curb-to-curb riders. For East Valley and Checkpoint, riders indicated a median 5 minute walk. Using a 3 mph walk speed, this is equivalent to 0.25 miles.

Only 10 people provided travel time by bike, and only 2 riders provided travel time by car. This is not enough data points for meaningful analysis.

The patterns in Helena are consistent with national trends. For a local example, Figure 7-11 below shows results from our Bozeman rider survey for the distribution of travel times to or from the bus stop. As riders utilized faster modes to get to the bus stop, there were fewer shorter trips. Generally the travel times across modes were similar. For example, about 90% of riders traveled less than 20 minutes regardless of mode (96% for walking, 88% for biking and 88% for auto).

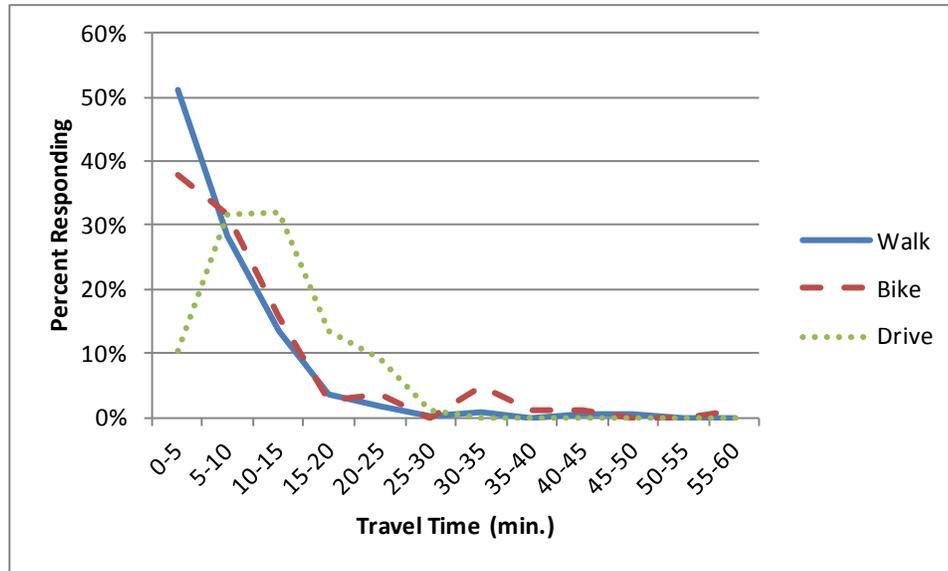


Figure 7-11: Distribution of rider travel times from Bozeman Streamline on-board survey, 2012.

Rider Satisfaction and Needs

Riders were asked to use a 1-5 scale (very dissatisfied to very satisfied) to rank their satisfaction with different aspects of HATS service. This type of questions is known as a Likert-scale. The count (N) of people who responded to the question excludes the N/A response. For these Likert-scale questions, our analysis included determining whether there was a statistically significant difference between responses by riders and non-riders. This was determined by using the standard statistical analysis practice of grouping responses as positive or negative, then running the Pearson's Chi Square Test.

Rows ending with an asterisk * indicate a statistically significant difference in responses between riders and non-riders (95% confidence level). Among the Likert-scale questions, 9 of the 38 responses had statistically significant different distributions.

Overall, most riders are satisfied to very satisfied with HATS service. However ratings should be interpreted knowing that people tend to apply an optimism bias and inflated rankings when judging a service or business that they use.

Satisfaction

Please rate your level of satisfaction with HATS in each of the following areas



Figure 7-12: Rider level of satisfaction.

There were several areas with a significant number of negative responses, indicating that there is opportunity for improving these aspects of the service. On-time performance and bus stop amenities rated lowest among fixed route riders.

Between the three services, there was statistically significant variation in responses for all areas except on-board safety and overall service. The curb-to-curb service rated better than the Checkpoint and East Valley fixed routes.

Open Comments

The detailed qualitative comments submitted by riders provide some of the most valuable insight into rider satisfaction levels and needs. At the end of the survey two open-ended questions offered riders opportunities to share their concerns, perspectives and suggestions:

I would use HATS more often if...

Do you have any additional comments on how HATS may be able to serve you better?

All comments are included in Appendix C. The following table summarizes the categories of comments. Comments from both open ended questions are combined.

Overall, the vast majority of comments requested increased service – either weekends, longer hours, additional stops and increased frequency on existing routes, or service to new areas. Weekend service was the most frequently requested improvement. The need to improve reliability including on-time performance also received a relatively large number of comments. A large number of riders also complimented the service and noted that it was important to their quality of life.

Table 7-2: Summary of rider survey comments

Response Category	Response	East Valley	Curb to Curb	Checkpoint	Response Count
Saturday/weekend	Saturday or weekends	12	18	33	69
Longer Hours	Earlier morning or later in evening. NOT higher frequency.	14	10	12	37
Expanded Service	Geographic expansion / new routes OR Additional stops on existing routes.	4	6	22	33
Reliability	Runs early, Runs late, Breakdowns	13	5	8	27
Buses	Anything about comfort, cleanliness, ADA, or other physical issues with buses	5	0	7	13
Frequency	Additional runs on existing routes. Tweaks to schedule times. NOT new routes.	6	0	5	12
Amenities	ONLY bus stop amenities: benches, shelters, ADA etc.	3	1	5	9
Route Design	Circular routes / Takes too long to get where I want to go.	0	0	4	5
Sunday	Sunday	1	1	0	3
Compliments	Positive comments about HATS as a whole. NOT compliments for specific drivers.	6	13	16	39
Customer Service	Negative and positive comments specifically about customer service - mostly drivers	4	6	1	11
Better Outreach	Don't understand schedule / don't know about real time or texting or those features don't work reliably	1	0	0	1
Need Based	"I would ride bus more if (specific personal circumstance)"	5	14	8	34
Other	includes route ideas	4	2	7	16
Totals		52	49	73	174

7.3 Community Survey

A community survey was made available to anyone who wished to complete it. The survey contained questions designed to collect a wide range of both quantitative and qualitative data including information about whether respondents' are HATS riders, demographic data, factors likely to influence ridership, and the level of community support for HATS.

The survey was made available on the project website and hard copies were distributed at events as well as through stakeholders who agreed to distribute them to clients and employees. The survey was publicized through print and TV news. A total of 412 surveys were submitted with approximately 75% submitted via the web and the remainder on paper. The largest response groups were from clients of the independent living center, and participants in the Retired Senior Volunteer Program. The sample has a lower median income than the community at large, and 70% of participants were female.

We got 407 responses from the community survey of a quality that we could analyze, of which 112 are riders and 295 are non-riders. The large number of non-riders who filled out the survey provided valuable perspectives that were not captured in the on-board survey. Throughout this section, our analysis of survey results examines rider and non-rider responses separately.

Riders/Non-Riders

Have you used HATS in the past year?

N=407



Figure 7-13: Numbers of riders and non-riders who completed the survey

Riders/Non-Riders in Household

Does anyone in your immediate household ride HATS once a month or more?

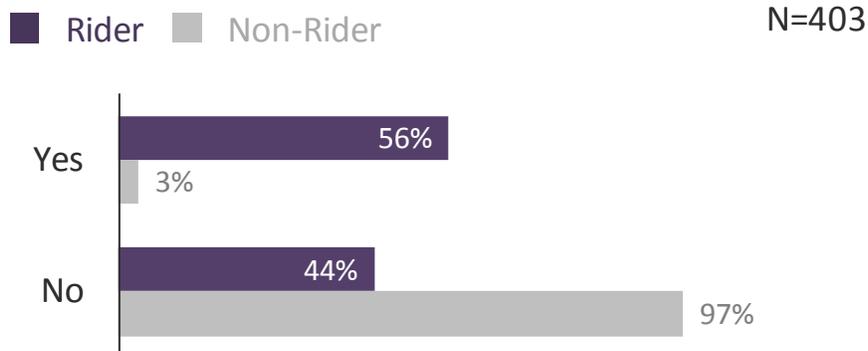


Figure 7-14: Riders/non-riders in household

The survey included three sets of questions that asked respondents to use a 1-5 rating scale – known as a Likert-scale. In total, respondents were asked to rate 28 statements using the Likert-scale. Two of these sets of questions addressed factors affecting ridership and the third set of questions addressed community support for HATS. In the figures in this section percent of negative (strongly disagree, disagree) compared to positive (agree, strongly agree) responses are shown. The count (N) of people who responded to the question excludes the N/A response.

For these Likert-scale questions, our analysis included determining whether there was a statistically significant difference between responses by riders and non-riders. This was determined by using the standard statistical analysis practice of grouping responses as positive or negative, then running the Pearson’s Chi Square Test. In figures Figure 7-19, Figure 7-20, and Figure 7-26 rows ending with an asterisk * indicate a statistically significant difference in responses between riders and non-riders (95% confidence level). For 19 of the 28 responses there was a statistically significant difference between responses by riders and non-riders. It is also important to note that respondents answering Likert scale questions tend to rank items above neutral, so caution should be used in interpreting responses in an overly positive way.

A copy of the community survey is included in Appendix C. In the figures below, “N” is the number of responses for the particular question.

Demographics

Gender

What is your gender?

■ Rider ■ Non-Rider

N=386

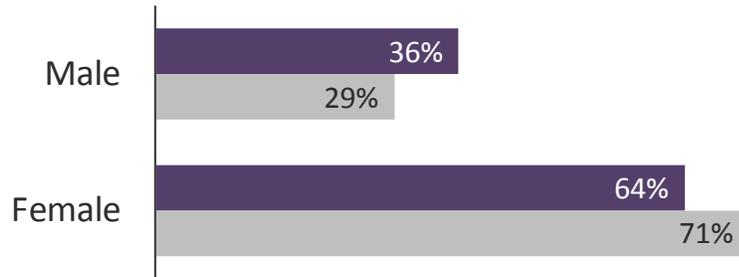


Figure 7-15: Gender of respondents

Age

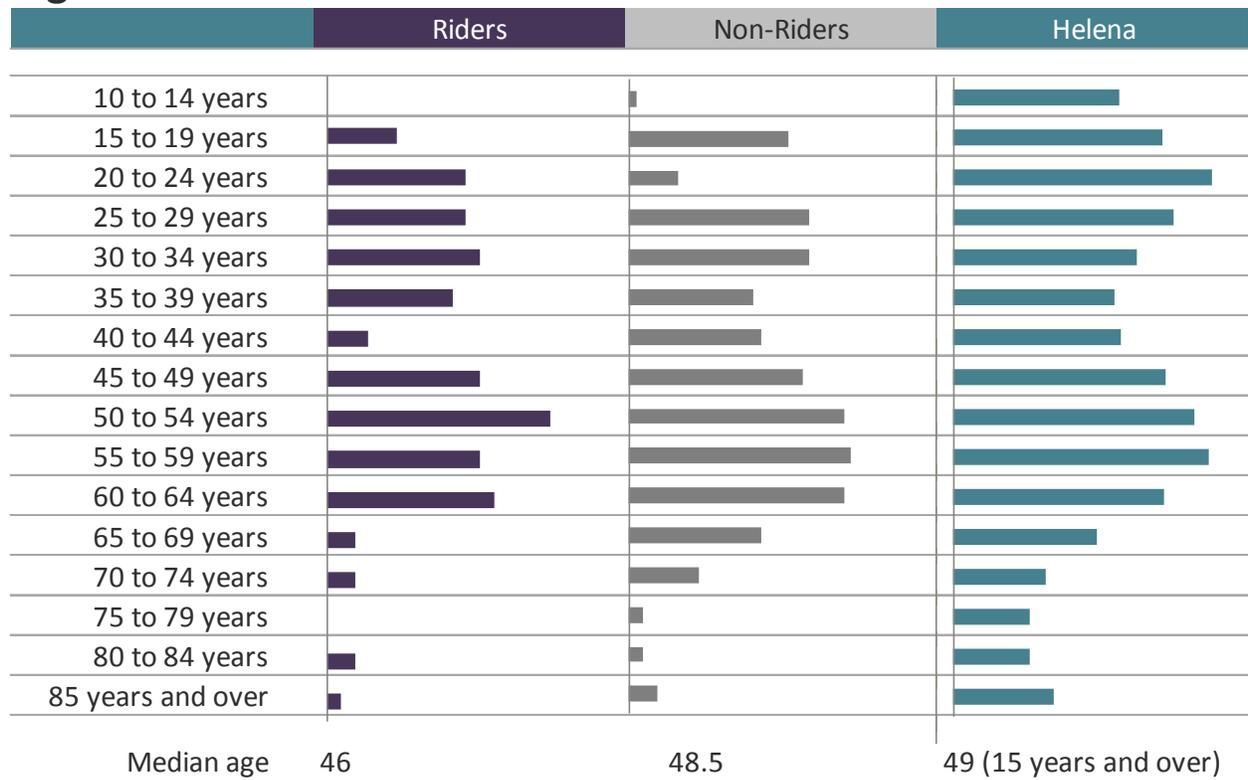


Figure 7-16: Age of respondents

Household Income

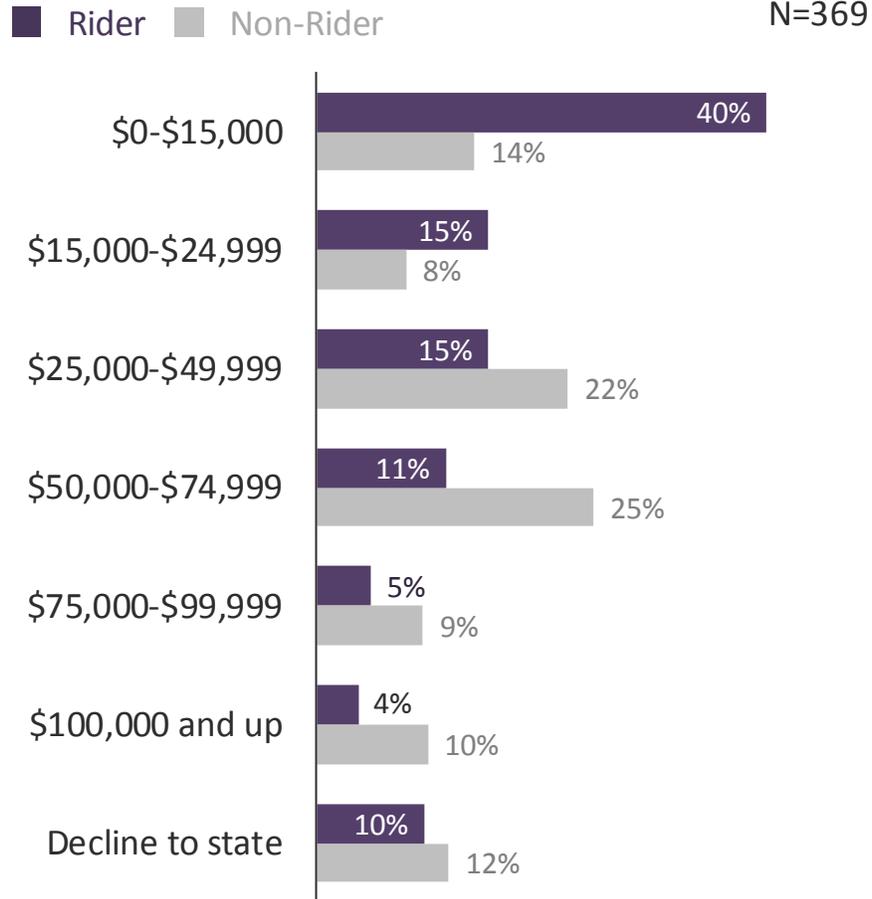


Figure 7-17: Household income

Disability

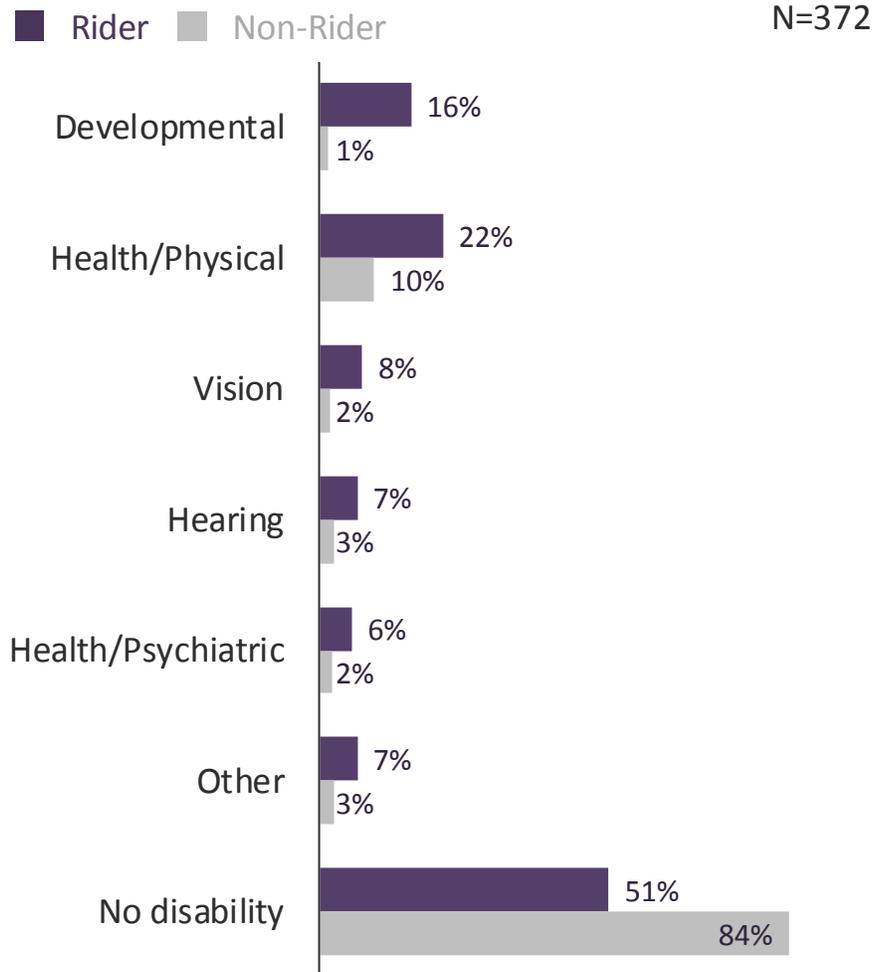


Figure 7-18: Respondents with a disability

Factors Affecting Ridership

The responses to the questions in this section provide valuable insight for developing strategies to attract more choice riders while continuing to maintain and improve service for transportation disadvantaged populations. We have grouped the factors affecting ridership into three broad categories of automobile access; service convenience, safety and cost; and marketing and communications.

Most of the factors affecting ridership were included in two sets of Likert scale questions for which the responses are summarized in Figure 7-19 and Figure 7-20 below. In each of the “neg/pos” columns, these figures show the percent of negative (strongly disagree, disagree) compared to positive (agree, strongly agree) responses. The “count” columns show the number of people who responded to the question (N =), excluding N/A responses. An asterisk* in the “var” column at the end of each row indicates a statistically significant difference in responses between riders and non-riders (95% confidence level).

Among the questions presented in Figure 7-19, it is reasonable to assume that HATS can take actions that can improve scores among nine of these areas. Three areas – car ownership, making multiple stops on a trip, and whether someone minds waiting for a bus – we assume are outside HATS influence. HATS can take actions that can improve scores for all the questions presented in Figure 7-20.

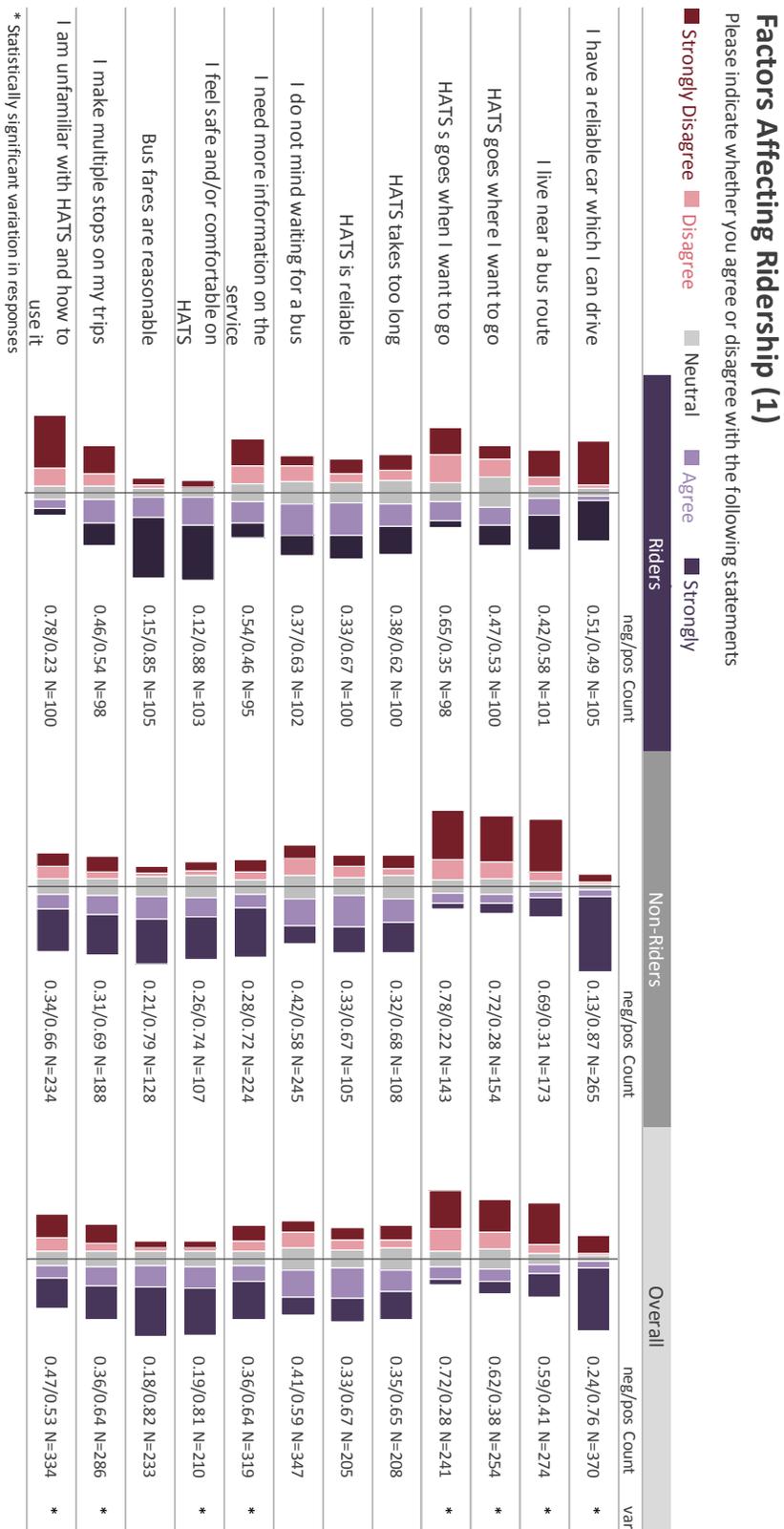


Figure 7-19: Factors affecting ridership (1)

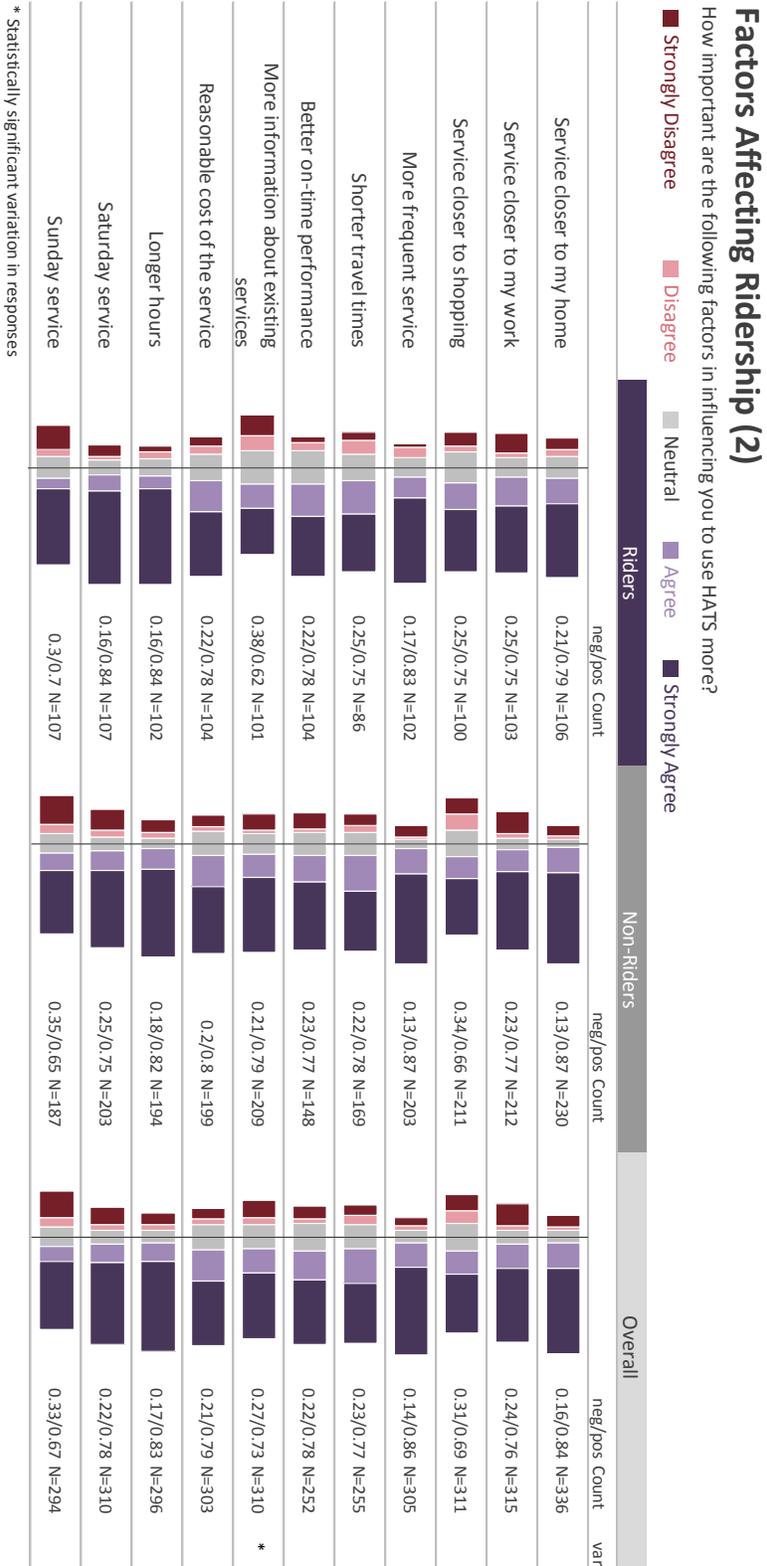


Figure 7-20: Factors affecting ridership (2)

Automobile Access and Operating Cost

As shown in Figure 7-19 non-riders are far more likely to have a reliable car (87% vs. 49%), reflecting the safety net nature of HATS current service. Responses about the effect of the price of gas (Figure 7-21) show that a price increase could result in a significant ridership increase. At the \$4.00 price point 35% of non-riders say they would likely use the bus and 79% of non-riders would use the bus if the price of gas climbed to \$5.00. These responses show that 61% of riders and 31% of non-riders are unaffected by the price of gas because they described themselves as either current riders or unlikely to ride.

Influence of Gas price

At what gas price would you likely use the bus

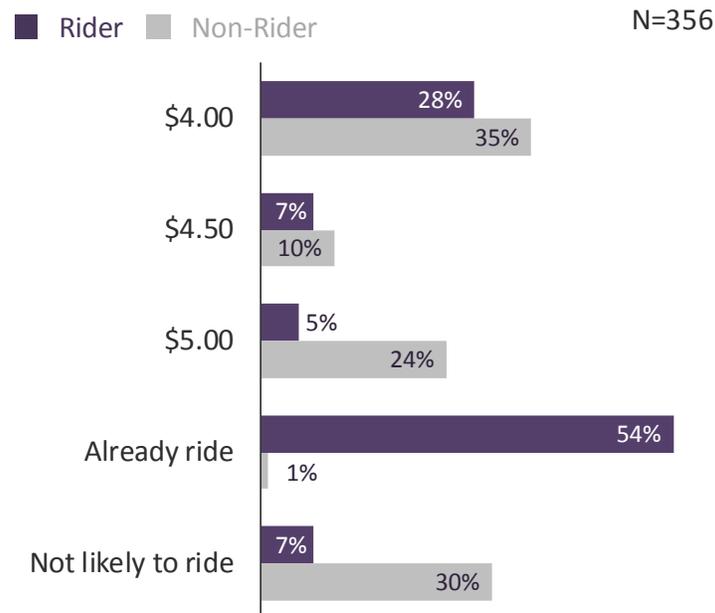


Figure 7-21: Influence of gas price

Service Convenience, Safety & Cost

The overwhelming majority of both riders and non-riders agreed or strongly agreed that HATS is safe and that current fare prices are reasonable (Figure 7-20). This means that in order to increase ridership, HATS should focus on improving convenience. Convenience includes all aspects of HATS services, as well as communication efforts to make it easy for the public to find information about the services. Communications and marketing are discussed separately in the next section. Service convenience can be divided into operational issues, amount of service, and service coverage.

Operational Issues

These issues include reliability, on-time performance and travel time. There was no statistically significant variation in the two groups' responses on any of these issues. While most riders and non-riders gave HATS high scores for reliability and similar majorities of both groups indicated they did not mind waiting for a bus (Figure 7-19), both groups also agreed by large margins that "HATS takes too

long” (Figure 7-19) and that “shorter travel times” would be an important factor in influencing them to use HATS (Figure 7-20). Both groups agreed most strongly that “better on-time performance” was an important factor (Figure 7-20).

Amount of Service

These issues include route timing and frequency as well as weekend service. Of these issues, the only statement for which there was a statistically significant variation in the two groups was “HATS goes when I want to go” (Figure 7-19). Both groups expressed a high level of dissatisfaction, but a much higher percentage of non-riders strongly disagreed with this statement. Large percentages of both groups strongly agreed that weekend service, longer hours and more frequent service were important factors that would influence them to use HATS more (Figure 7-20). Of these factors, Saturday service rated higher than Sunday service and more frequent service scored highest of all.

Service Coverage

Service coverage relates to proximity of service to residences and destinations including work and shopping. Responses related to service coverage are included in the Likert-scale questions in Figure 7-19 and Figure 7-20, as well as a question about likely trip purpose (Figure 7-22).

Of the Likert-scale questions, overwhelming percentages of both riders and non-riders agreed that service closer to their home, work and shopping were important factors, with large percentages strongly agreeing Figure 7-20. For both groups “service closer to my home” rated highest. For non-riders, service closer to home and work scored higher than service closer to shopping. The two related statements in Figure 7-19 had statistically significant variation between the two groups. Much larger percentages of non-riders strongly disagreed that they live near a bus route and that HATS goes where they want to go.

For both riders and non-riders, work, shopping, medical appointments, and personal business were the leading reasons they were most likely to use HATS’ services. Work was the leading potential trip generator for both groups. A large percentage of non-riders said they were not likely to ride (40%).

Overall, these results point to the need to expand and restructure HATS fixed route service to provide better service for commuters, providing higher frequency, shorter travel times and better on-time performance and access to residential areas, large employers and commercial areas.

Trip Purpose

For what purpose are you most likely to use HATS?

■ Rider ■ Non-Rider N=368

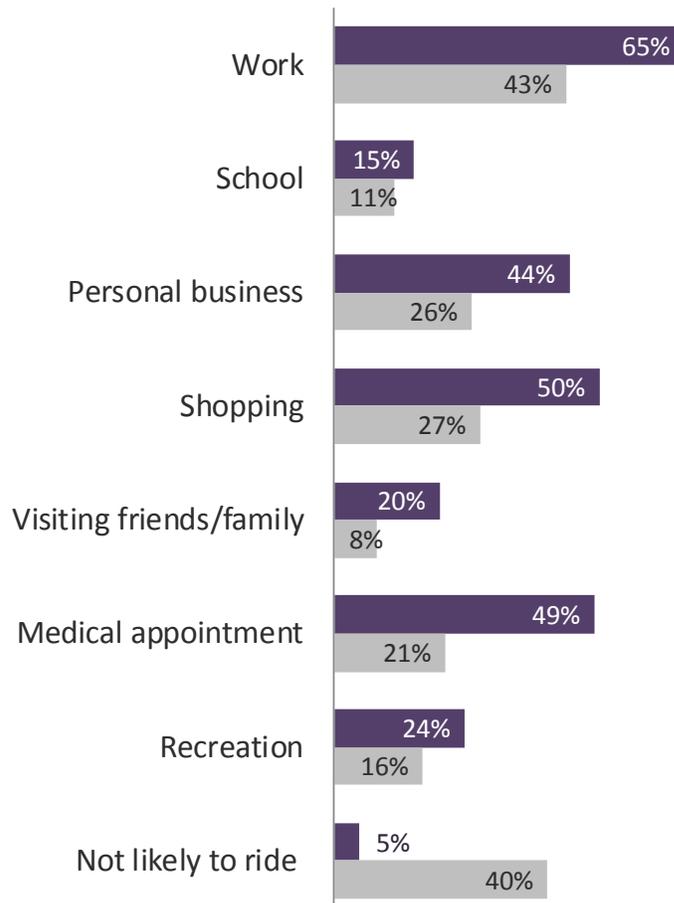


Figure 7-22: Most likely purpose for using HATS

Marketing & Communications

A number of questions evaluated respondent's level of awareness and need for information about HATS. The Likert-scale questions in Figure 7-19 and Figure 7-20 each included questions about whether people were familiar with HATS and whether they needed more information about current services. Three additional questions explored respondents' use of information technology and how HATS can best communicate information about its services. Responses to these three questions are summarized in the figures below.

All three of the communications-related, Likert-scale questions had statistically significant variations between the two groups. Among non-riders, 66% said they were "unfamiliar with HATS and how to use it" compared to 23% of riders (Figure 7-19). More significantly, large percentages of both riders (46%) and non-riders (72%) said they "need more information on the service" (Figure 7-19), 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.

When asked “What is a good way for HATS to reach you?” there was very little difference in the responses from the two groups (Figure 7-23). Significant percentages of both riders and non-riders indicated that print media (brochures, newspaper, posters) as well as electronic media (HATS website, email, social media) were good ways to communicate. TV and Radio also scored high. Similarly, there was very little difference in cell phone use (Figure 7-24), with high levels of use among both groups including over 70% of each group sending and receiving text messages and over 40% of each group accessing the internet. Both groups also had high levels of internet use Figure 7-25, with 80% of riders and 93% of non-riders reporting that they have internet access at home, and only 11% of riders and 3% of non-riders stating that they do not regularly use the internet.

Overall, these results indicate that there is a significant need to improve the information that is available to the public and to make that information easy to access. Among non-riders, the HATS website scored highest as a good way to communicate and it scored only slightly below schedules/brochures among riders (Figure 7-23). These results, combined with the cell phone usage results, indicate that website improvements including a mobile interface should be a high priority for HATS.

Methods of Communication

What is a good way for HATS to reach you?

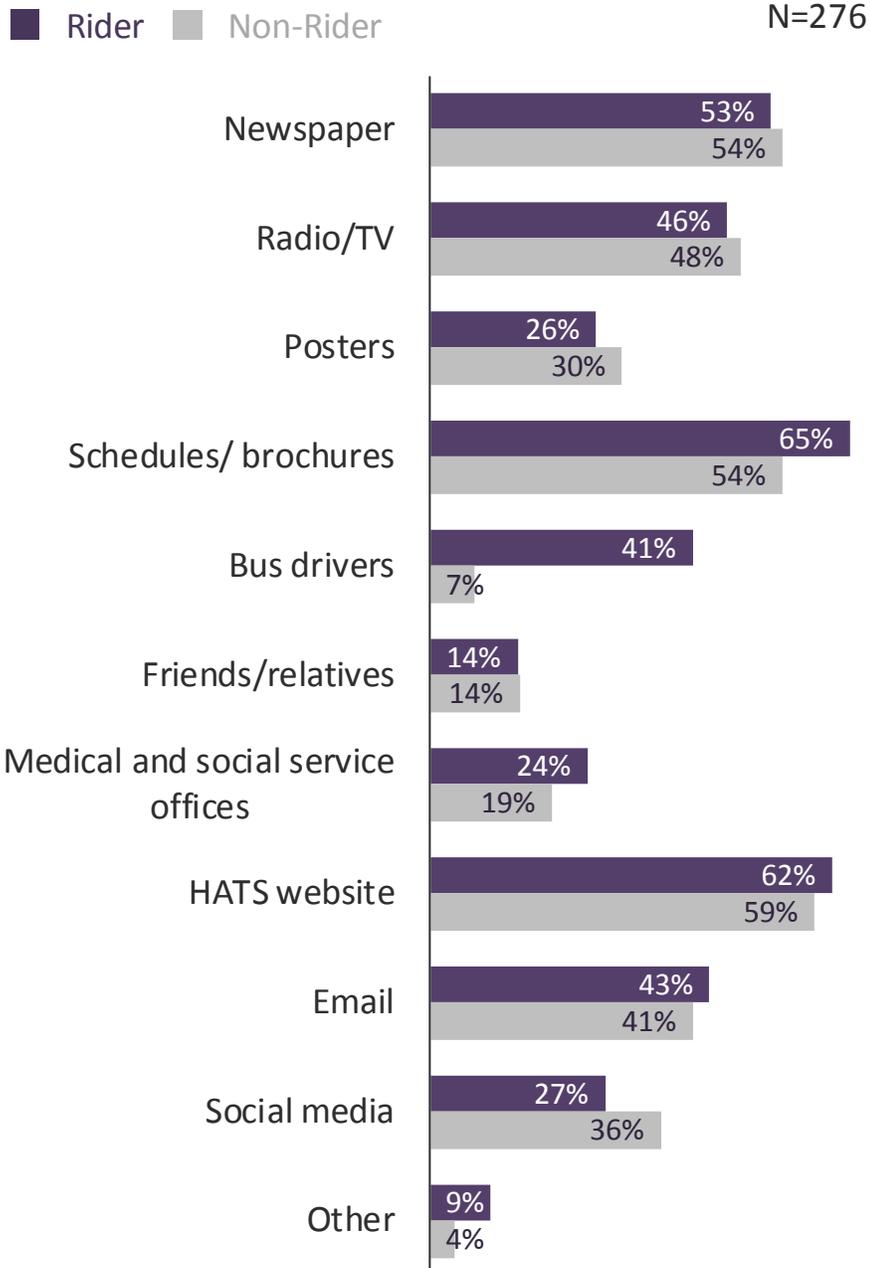


Figure 7-23: Communication preferences

Use of Cell Phone

Which of the following activities do you do on your mobile or cell phone?

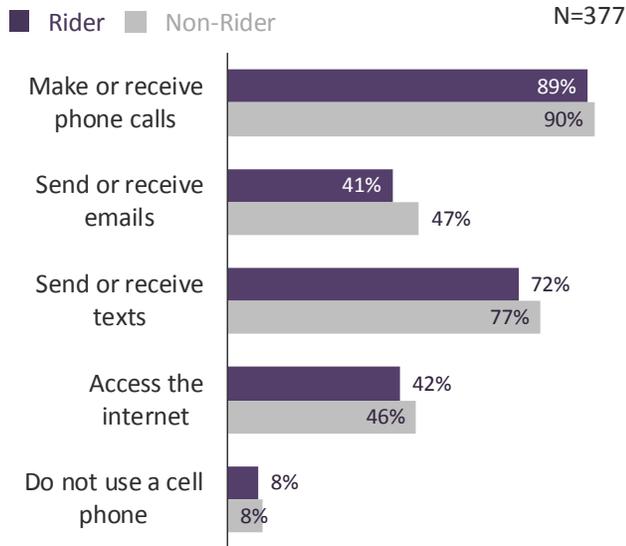


Figure 7-24: Use of cell phones

Internet Use

Where are you when you use the internet?

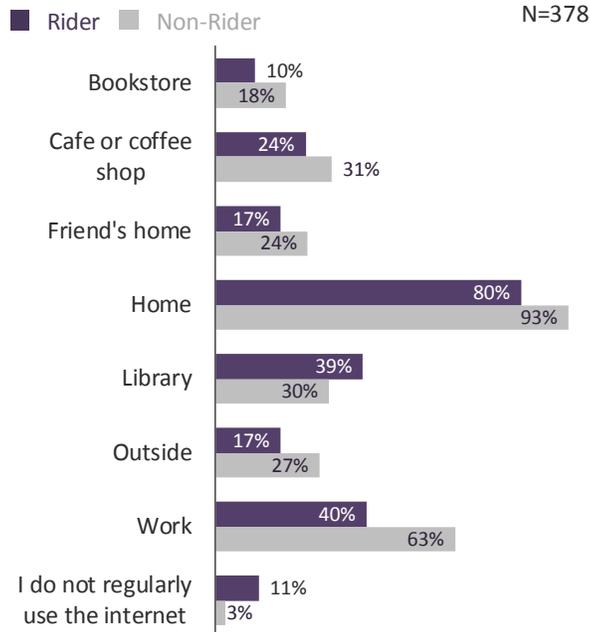


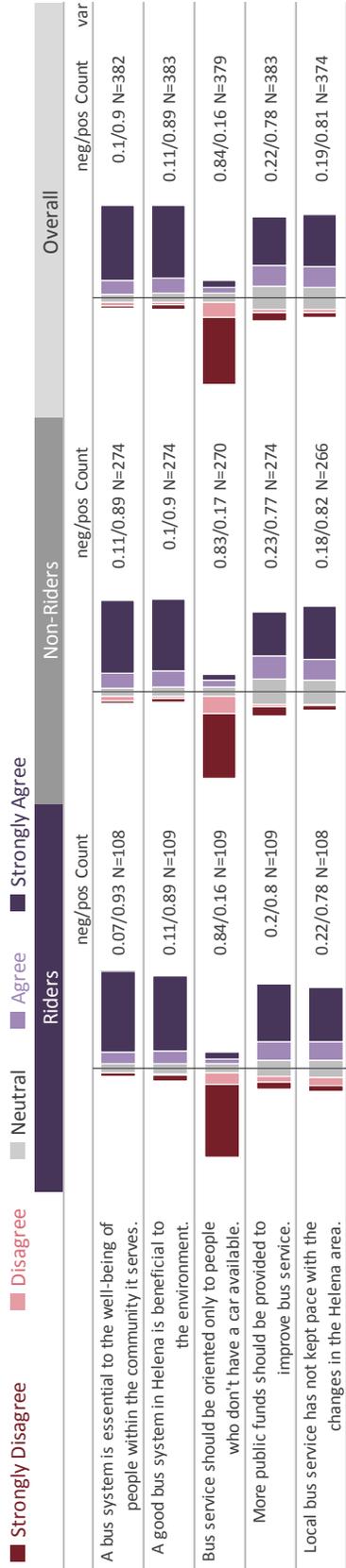
Figure 7-25: Internet use

Community Support for HATS

The third set of Likert-scale questions focused on exploring the level of community support for HATS Figure 7-26. There was no statistically significant variation in the responses from the two groups, and these responses showed strong support for HATS. Overwhelming majorities of both groups strongly agreed that “a bus system is essential to the wellbeing of people in the community it serves” and that it is “beneficial to the environment.” Both groups also strongly supported more public funding to improve bus service and agreed that “local bus service has not kept pace with the changes in the Helena area.”

The Value of Transit

Please indicate whether you agree or disagree with the following statements



* Statistically significant variation in responses

Figure 7-26: Rating the value of transit

7.4 Stakeholder Roundtable

A stakeholder roundtable discussion was organized and held at the Great Northern Hotel on November 29, 2012, with goals including continued engagement of stakeholders who participated in one on one interviews, additional input from a broader group of community leaders, broadening the knowledge base of HATS and other transit systems and gauging level of interest for continued involvement in HATS TDP implementation activities moving forward.

Over 57 community stakeholders participated in the event, including representatives from Helena’s 5 major employers, human service providers, Montana Department of Transportation, Senator Tester and Senator Baucus’ offices, the Helena City Commission and the Lewis and Clark County Commission. Reporters from the Helena Independent Record and 2 television stations attended and reported on the event. Helena Civic TV filmed the event and it was aired 7 times in the month following the event.



The roundtable featured a panel of transit system representatives from Havre, Bozeman, and Missoula. Each representative shared lessons learned in building their respective transit systems. The panelists included Chris Naumann from the Downtown Bozeman Partnership, Michael Tree with Mountain Line in Missoula, and Jim Lyons, the Director of North Central Montana Transit in Havre. Introductory and welcoming remarks about the important role of transit in Helena were made by the Helena City Manager, Ron Alles, and Joe McClure, Executive Director of the Montana Business Assistance Connection. HATS Manager, Steve Larson and Lisa Ballard of Current Transportation solutions provided information about the TDP process and some preliminary results from the information gathered to date.

Prior to the event, participants were encourage to locate their respective business or office location, as well as, places they frequently visit in the community, on a large scale Helena area map that depicted the location of the HATS Station and the checkpoint route. Each participant also received an information packet that included the event agenda, the HATS and East Helena Route brochure, one pagers on the Mountain Line, Streamline and North Central Montana Transit systems, contact information for each speaker and a copy of the white paper “Putting Transit to Work in Mainstreet America: How Smaller Cities and Rural Places Are Using Transit and Mobility Investments to Strengthen Their Economies and Communities .” Following the presentations participants were invited to share their thoughts on how Helena was similar to or different from the transit systems discussed during the presentations and to identify opportunities for HATS.

7.5 Driver and Dispatcher Interviews

On January 8-9, 2013, all 11 bus drivers (some of whom also function as dispatchers) plus the administrative assistant were interviewed at the Transit Center. The interviews, conducted by team member, Barb Beck of Beck Consulting, contained six questions exploring everything from bus

maintenance to routes and schedules, facilities, pay and training, and policies and procedures. Individual driver's comments were kept confidential to encourage candor. Drivers' comments were compiled and analyzed. The existing group of drivers represents a wealth of experience including several who have worked for large transit services in other states. The drivers provided many good insights and suggestions. Questions asked in the interviews can be found in the subsequent pages of this summary.

Drivers commented that maintenance of the buses was generally good. Suggestions related to maintenance included; attend to the minor maintenance items (wiper blades, headlights, seatbelts, etc.) on a more timely basis, follow a standard checklist or protocol for servicing so the same items are checked every time, improve the preparation of buses for winter driving, consider a mechanic shift in the evening or at night, improve the comfort of the drivers' seats, and reorganize so that the mechanic reports to HATS.

In relation to facilities, drivers were appreciative of the new transit center. Suggestions for improvements to the transit center included adding a drinking fountain, more food choices, a television, and a public address system for announcing Trailways buses. With respect to bus stops, drivers would like to see these better developed—benches, signs, and shelters. One driver commented that snow plowing is not well coordinated with bus stops and drivers have to let riders out into deep snow banks at some locations.

Drivers had the largest number of comments about stops and routes. Drivers work hard to try and stay on what is an impossible schedule. They suggested more routes and also serving the west side of Helena. Drivers are frustrated by conditions out of their control that cause them to run late—waiting at railroad crossings, long traffic lights, inclement weather, riders needing assistance, or being instructed by a dispatcher to go back and pick up a missed rider. Drivers made many specific suggestions about stops and routing. Some of the suggestions offered by at least several drivers included; combine stops into one stop for Target/Shopko, and Albertsons, drop the stop at the Capitol Hill Mall, take the stops out of parking lots (for example the Eagles) because these stops are both dangerous and time consuming), and address issues at the Guardian stop and 900 and Jackson.

Demand response routes are frequently too tightly scheduled according to the drivers. The current three drivers on demand response is not adequate, there used to be four.

Drivers also believed based upon what riders have told them that there is demand for slightly extended weekday hours and weekend service. One driver suggested geographic extension of services towards or to Lincoln and Townsend.

Generally drivers indicated they believe their compensation is fair. Many commented on the quality of the benefits and while they might like to see the hourly rate raised to \$18, they were highly satisfied with the benefits. Drivers also commented that they were satisfied with the training offered and felt they had the training necessary to perform their job duties. Customer service training for dispatchers was suggested. Additional driver training would likely be well-received, but no specific training gaps were identified by the drivers.

When asked if they understood what was expected of them in their job, every driver and dispatcher answered in the affirmative. All drivers also knew where to look for answers to any policy questions.

Finally and of note, most drivers expressed personal appreciation and support for HATS Manager, Steve Larson. Drivers and dispatchers support Steve and his efforts to operate HATS in a professional manner.

7.6 Public Open House

A public open house was held from 12:00-5:00 p.m. on January 9, 2013, at the HATS Transit Center on Montana Avenue. Approximately 40 people attended the open house. Attendees were greeted and given a brief explanation of the TDP process. A slide presentation with information about HATS was running continuously on a wall screen in the transit center. Maps of the checkpoint and East Valley routes were posted on the walls for discussion and tours of the facility were available as requested. A 6-question comment form was available and most attendees provided either verbal or written comments in addition to asking questions about HATS service and the TDP process. Most, but not all of the attendees were bus riders. A copy of the comment form can be found in the subsequent pages of this summary.

The following comments are paraphrased and summarized from the open house;

- People don't know enough about the HATS services (like where the buses go, where the stops are, how often, what the cost is, etc.) and the printed schedule needs improvements,
- Need to add weekend service, extended hours, more frequent service, Park and Ride service (from Montana City, East Helena, and Bob's in the north valley), west side service, service to Ft. Harrison, and "kneeling" buses for elderly,
- Routes need to be redesigned to run on time,
- Consider out and back rather than circular routes, riding around the circle of stops takes a large amount of time and causes some not to ride while others must plan for large amounts of time,
- The transit center needs better signing,
- Drivers are friendly and courteous.

7.7 Key Responses and Themes

The top observation by riders was that the checkpoint (fixed) route has very poor on-time performance. This observation was confirmed by the driver interviews. The checkpoint route circles the central area of the city and returns to the transit center on one-hour intervals. The number of stops, the locations of the stops, the need for drivers to assist wheelchair-bound riders or others, inclement weather, difficult intersections, parking lots, trains, and other factors combine to assure that the checkpoint bus is only infrequently able to stick to the published schedule.

Poor on-time performance of the checkpoint route has had cascading affects. For example, when riders or potential riders must arrive at their destinations at the appointed time, the unreliable appearance of the checkpoint bus requires them to find other transportation solutions—be it the HATS curb-to-curb service or another means of transportation. Some reported calling the curb-to-curb service not because they were unable to ride the checkpoint bus, but rather because they needed to arrive on time and this

was unlikely given the issues with the checkpoint bus. Drivers also reported that the curb-to-curb service frequently has to “bail out” the checkpoint route when it gets too far behind schedule. With only three curb-to-curb buses operating, this can adversely affect the timeliness of the curb-to-curb service as well.

Riders and drivers suggested breaking the current single checkpoint route into more than one route. The most common suggestion was to have a north route and a south route that would meet at the transit center.

Riders especially mentioned the need for both extended daily hours and service on Saturdays and perhaps Sundays. Some individuals that use HATS to ride to and from work, work on the weekends as well as during the week.

The west side of Helena is not being served by HATS. Many commented that this needs to be rectified and that there are many potential riders on the west side of Helena who would ride if the service was available.

Drivers commented most frequently on the fact that the checkpoint route enters and exits many parking lots. Drivers thought this inappropriate for both safety and timeliness reasons. They suggested changing parking lots stops to other locations on streets that could be used safely by riders.

Bus stop locations are sorely lacking in amenities. Signage, posted schedules, benches, and shelters were identified as needed improvements at bus stops.

The Transit Center itself was mentioned by many as a stellar part of the operation. The center is functional, clean, safe, comfortable, and pleasant to be in.

The printed schedule for the checkpoint route does not contain addresses for the stops. Some people—even long-time residents-- expressed frustration at not being familiar with what location the reference in the schedule corresponded to. The map does not provide clear enough information to determine exactly where the bus will stop in a given block or area.

8 Coordination

8.1 Coordination & Mobility Management

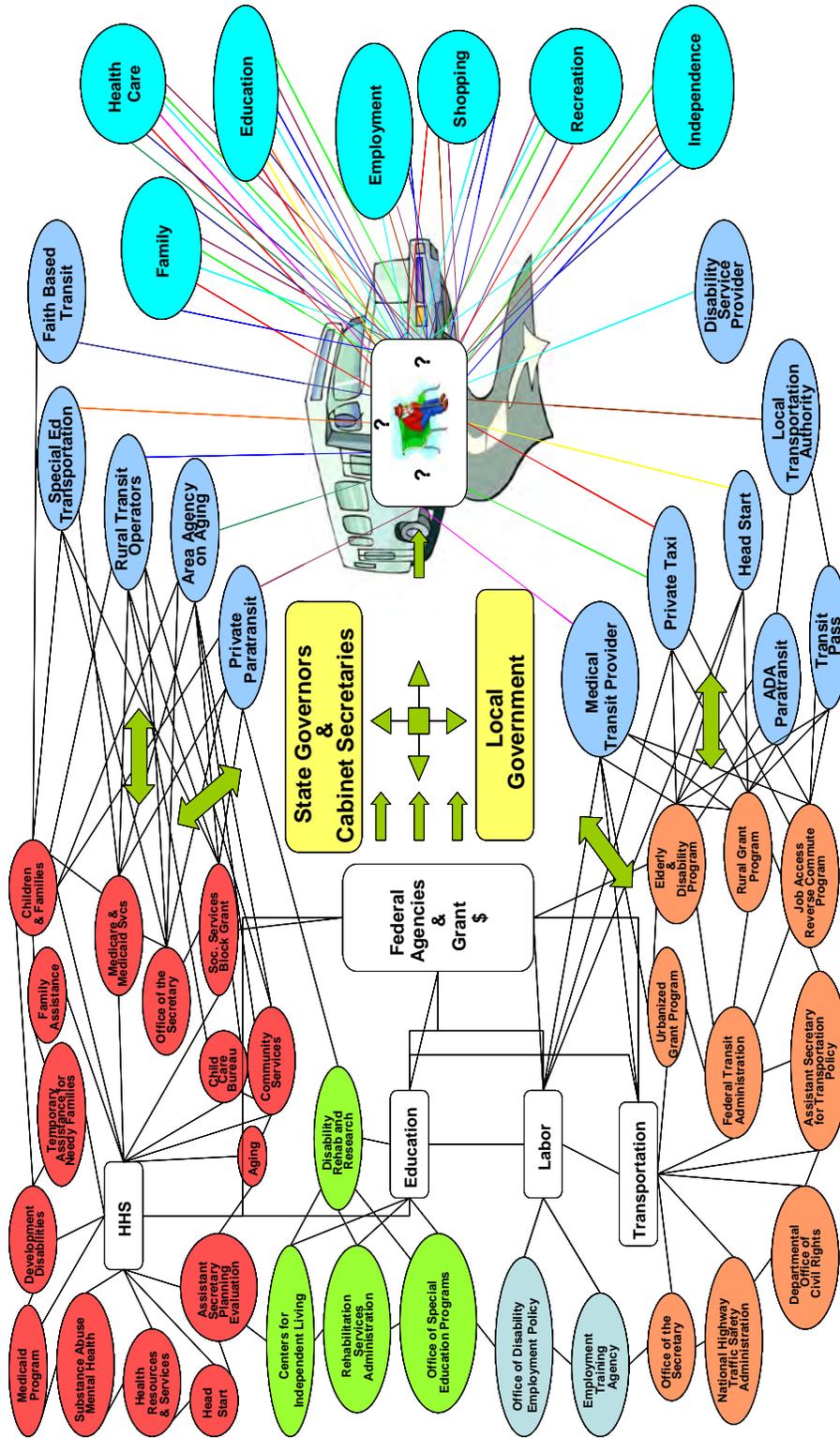
Communities across the country that are leading the state of the practice and succeeding in making public transportation an essential element of their quality of life and their economy are achieving this goal with effective coordination through professional mobility management. A quality these communities all share is that the lead governmental and non-profit agencies have organizational cultures that value cooperation and collaboration and are willing to invest in coordination because they have a shared vision as well as a practical understanding of the benefits that can be achieved.

One of the best summaries of coordination opportunities and benefits we have seen is a factsheet recently published by the Kansas University Transportation Center (Weaver & Vander Broek, 2011), in which the authors state, “Coordination is about managing resources and sharing decision-making among organizations working together for a common goal. It encompasses management, resources, cost-effectiveness, broad perspectives, multiple stakeholders, cooperation and action.”

The Challenge and Complexity of Coordination

Providing a coordinated, efficient transportation system requires great expertise in navigating through the complicated network of federal transportation funding sources and rules, and applying this understanding to the web of community partners and needs. The spaghetti diagram in Figure 8-1 shows the 62 federal programs identified by the Congressional Office of Management and Budget in 2004 that have transportation funding programs for the human service portion of community transportation. Layered onto the federal funding sources are the state and local governments, the transportation providers, and the supporting social services.

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.



Source: United We Ride

Figure 8-1: The Complexity of Transportation Funding

Helena Coordination Needs

The network of organizations providing and needing transportation in the Helena valley is typical of communities across the country. The spaghetti diagram for Lewis & Clark County is as complicated as the diagram in Figure 8-1. We identified approximately 10 organizations that fund or represent people who need transportation. Many of the programs identified in the bubbles on the left side of the diagram, connected to federal Departments of Health and Human Services, Labor, Education, and Transportation, are contributing funds, either through direct grants, contracts, or purchase of rides.

Coordination Models

There are many successful community or coordinated transportation systems serving rural, small urban, and metropolitan regions around the country. These systems can be categorized into three, generalized model types:

- **lead agency model** - In the lead agency model, one local organization is responsible for coordinating transportation services and activities within a defined geographic area. The lead agency may be a private or non-profit organization, social service or related agency, or public entity.
- **brokerage model** - In the brokerage approach, one entity acts as an agent to arrange rides for persons needing transportation among a group of operators that “bid” to provide services. Both the broker and transportation provider receive fees for services, which are rolled into transportation charges per capita, per trip or some unit, and/or per mile. Such charges are paid by individuals or insurance companies directly or via health and social service funding.
- **administrative agency** - In the last type, an administrative agency is a public agency or entity (often a transit authority) that has responsibility to coordinate social service or specialized transportation, in addition to its role in providing public transportation.

(United We Ride 2007a)

Mobility Management

Mobility management is the state of the practice for planning and implementing effective coordination. The goal underlying the mobility management concept is to achieve a paradigm shift under which transportation providers are not measuring their performance based on the cost efficiency of how they operate their fleet, but instead measuring their return on investment in terms of moving people and meeting community needs. Simply providing transportation capacity is only the first step. What really matters is how that capacity is being used.

Elements of Mobility Management

As illustrated in Figure 8-2 below, to effectively achieve the goals of maximizing transportation options and service coverage while also being efficient and cost-effective, a mobility management system must successfully serve two key functions:

- 1) A mobility manager must plan and coordinate region-wide and long term, by building working partnerships, coalitions and business relationships between multiple transportation service providers, social service providers and other stakeholders.
- 2) On the short term, day-to-day level of serving individual riders and maximizing ridership, they must be effective at creating and managing systems and communication strategies that help people find rides and get where they need to go.

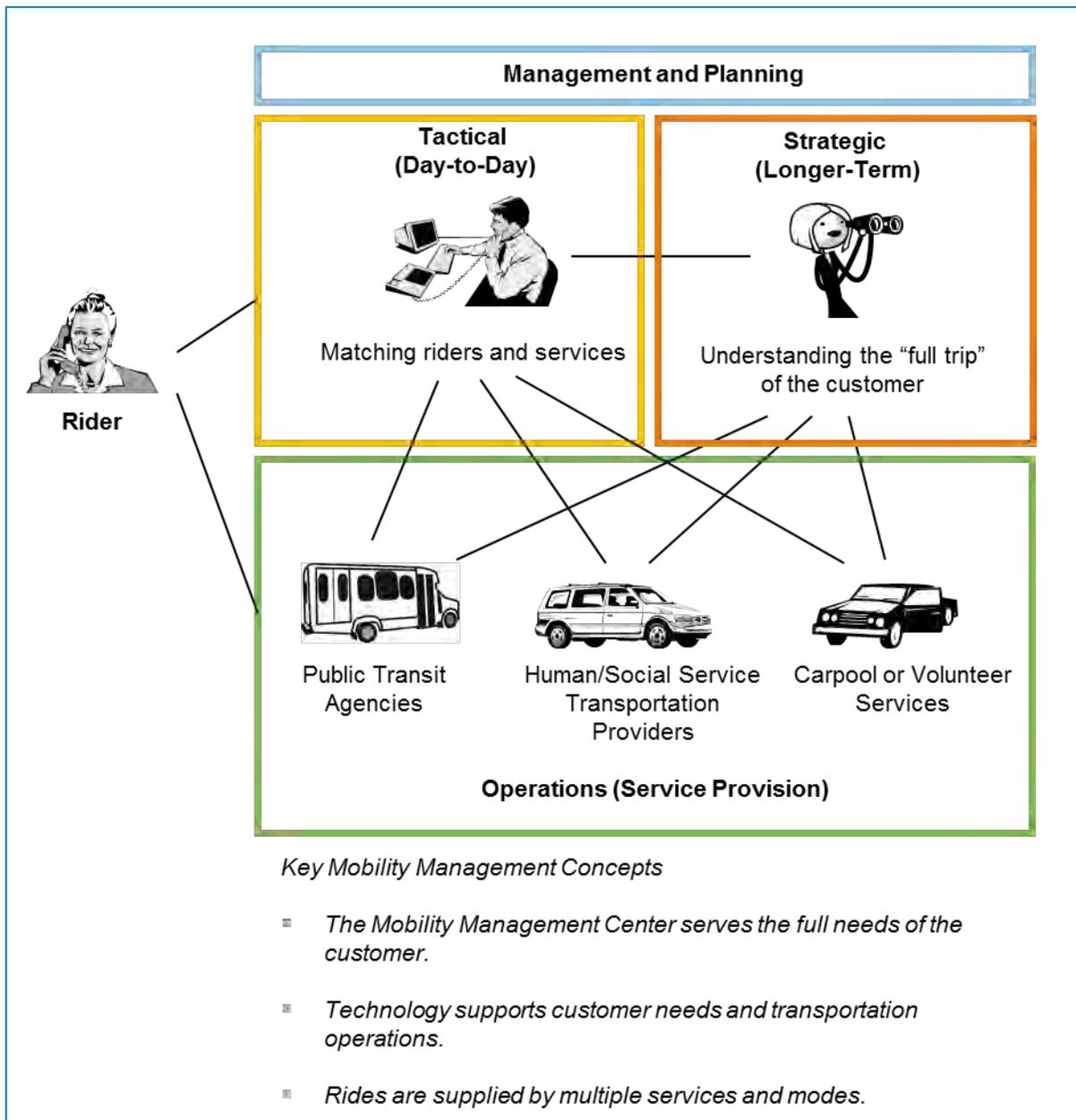


Figure 8-2: Mobility Management Concepts

Mobility management strategies offer an effective approach to optimizing the value of transportation services. Mobility management encompasses and synthesizes a broad range of complementary strategies that include:

- Qualified, professional mobility management staff who coordinate public transportation and human service transportation
- Intelligent Transportation Systems (ITS) Technology designed and implemented using systems engineering
- Effective marketing and convenient service
- Creative, broad-based funding strategies including public-private partnerships, and strong community support and local funding that leverages federal and state funding
- Engagement in transportation demand management and local and regional planning efforts to ensure sustainable, transit oriented community design and growth patterns

Staffing for Mobility Management

It is important for decision-makers not to underestimate of the qualifications, commitment and time needed to manage public transit in communities of any size. Mobility management can fall short for one or both of the following two reasons:

- 1) Qualified staff are hired but have so many responsibilities for operating the local transit system that they have no time for mobility management tasks such as pursuing new funding sources, or building and coordinating coalitions and partnerships.
- 2) Low salary and low expectations for professional skills result in hiring unqualified personnel.

Mobility management functions can be assigned to existing staff, or a new position can be completed. In this project we will loosely use the term “mobility manager” to apply to anyone carrying out some or all of the mobility management functions, regardless of job title.

Mobility Management Functions

The full range of mobility management services may include customer relations, marketing, planning, land use development, system integration, finance, administration, legal, compliance, human resources, multimodal operations, information technology, engineering, construction, and varied non-operating functions (Crain & Associates, Inc., et.al., 1997).

The challenge is to establish a network of transportation providers that is properly funded and can meet the entire community’s needs within these constraints.

Although conceptually simple, working through the coordination process and bringing community partners together can be challenging, because most partners focus on their one business or service and do not understand what transportation coordination means or its potential benefits and cost savings.

The most up-to-date information on Mobility Management is available at the Partnership for Mobility Management website¹.

Another good resource is United We Ride, an interagency Federal national initiative that supports states and local communities in developing coordinated human service delivery systems, generally focused around public transit. Eleven federal agencies and one Presidential initiative make up the United We Ride program. United We Ride provides state and local agencies with coordination grants as well as coordination and planning self-assessment tools, technical assistance, and other resources. Their website functions as a clearinghouse of mobility management and coordination information. Among other efforts, United We Ride developed a “framework for action” for “building the fully coordinated transportation system at the community and state level”. (US DOT 2003)

Local Level Coordination

In many cases, there are opportunities to share resources. This is not to say that public transportation can provide all social service transportation in a community, or that all publicly funded social service vehicles should be open to the public. They should not as there are some circumstances that warrant segmented transportation.

“There has been a misperception that categorical funding “does not permit” the sharing of resources among client groups of different types. Both the U.S. Departments of Transportation (DOT) and Health and Human Services (HHS) have issued instructions that are clear on such issues: as long as there is excess capacity and service is not being denied to the primary client group, it is indeed possible to use vehicles and other resources to serve a variety of client types, and it is possible to have clients from different sponsoring agencies riding on vehicles at the same time.” (Burkhardt 2004)

Transportation system and social service staff often do not have the time or training to “unravel the spaghetti” related to non-FTA transportation expenditures by funding sources such as Community Development Block Grants (CDBG), Medicaid, and others. However, social service partners are often in the best position to collect data about unmet needs that can be used for service planning and coordination.

Coordination between Communities and Modes

Besides coordinating locally, a complete mobility management approach considers coordination with intercity buses, trains, and airports. Bus stops and schedules are often not coordinated or connected, and often can be infeasible to coordinate. Nevertheless, communities should investigate opportunities including an attractive, well-located transfer station that serves both in-town and intercity buses with the potential connection with taxis and trains.

¹ <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=1790>.

State Level Coordination

Regional and state-level partnerships and mobility management systems can help provide valuable assistance to communities and help ensure that resources are allocated where they are needed most and will have the greatest impact. A good example of successful, progressive policies at the state level is in Idaho where the statewide Community Transportation Association and the state's multi-tiered mobility management system have both demonstrated significant success in maximizing service and efficiency through strategic planning and effective allocation of available federal funding. This success is partially the result of the state's decision to invest in and strengthen the Community Transportation Association of Idaho (CTAI).

8.2 Coordinated Service Planning

The FTA requires that any organization applying for federal funding to support transportation have a Coordination Plan and update that plan annually.

Following FTA guidelines, Montana Department of Transportation requires any community applying for federal grants supporting transportation to develop a coordination plan. The purpose of a coordination plan is to summarize existing transportation services in a given region and set goals for anticipated coordination efforts. MDT provides an outline for coordination that should be followed, and plans should be updated annually.

FTA guidance defines a coordinated public transit-human service transportation plan as one that identifies the transportation needs of individuals with disabilities, older adults, and people with low incomes; provides strategies for meeting those local needs; and prioritizes transportation services for funding and implementation. The plan has several required elements:

- An assessment of available services that identifies current providers (public, private, and non-profit);
- An assessment of transportation needs for individuals with disabilities, older adults, and people with low incomes;
- Strategies, activities and/or projects to address the identified gaps and achieve efficiencies in service delivery; and
- Relative priorities for implementation based on resources, time, and feasibility for implementing specific strategies/activities identified.

Montana implements this process through Transportation Advisory Committees (TAC's). Each local transportation service area must have a TAC. TAC's are not governing bodies, but are intended to act as an advisory group that cooperatively assists the local transit operator in assessing and prioritizing local needs. A TAC should include representation from the FTA Recommended Representatives/Partners groups below.

- 1) Transportation partners

- a) Area transportation planning agencies, including Metropolitan Planning Organizations (MPOs), Councils of Government (COGs), Rural Planning Organizations (RPOs), Regional Councils, Associations of Governments, State Departments of Transportation, and local governments;
 - b) Public transportation providers (including Americans with Disabilities Act (ADA) paratransit providers and agencies administering the projects funded under FTA urbanized and non-urbanized programs);
 - c) Private transportation providers, including private transportation brokers, taxi operators, van pool providers, school transportation operators, and intercity bus operators;
 - d) Non-profit transportation providers;
 - e) Past or current organizations funded under the Section 5310, JARC, and/or the New Freedom programs; and
 - f) Human service agencies funding, operating, and/or providing access to transportation services.
- 2) Passengers and advocates:
- a) Existing and potential riders, including both general and targeted population passengers (individuals with disabilities, older adults, and people with low incomes);
 - b) Protection and advocacy organizations;
 - c) Representatives from independent living centers; and
 - d) Advocacy organizations working on behalf of targeted populations.
- 3) Human service partners:
- a) Agencies that administer health, employment, or other support programs for targeted populations. Examples of such agencies include but are not limited to Departments of Social/Human Services, Employment One-Stop Services, Vocational Rehabilitation, Workforce Investment Boards, Medicaid, Community Action Programs (CAP), Agency on Aging (AoA); Developmental Disability Council, Community Services Board;
 - b) Non-profit human service provider organizations that serve the targeted populations;
 - c) Job training and placement agencies;
 - d) Housing agencies;
 - e) Health care facilities; and
 - f) Mental health agencies.
- 4) Other:
- a) Security and emergency management agencies;
 - b) Tribes and tribal representatives;
 - c) Economic development organizations;
 - d) Faith-based and community-based organizations;
 - e) Representatives of the business community (e.g., employers);
 - f) Appropriate local or State officials and elected officials;
 - g) School districts; and
 - h) Policy analysts or experts.

Montana Department of Transportation recommends that TAC's meet at least quarterly to discuss transit related issues and propose solutions. Details of the activities and responsibilities recommended by the Federal Transit Administration are included in Appendix F.

9 Marketing and Technology

Marketing and technology are closely interrelated because many of the most important marketing strategies depend on technology. Technology is essential for providing customers with easy-to-use information that makes a bus system convenient and attractive to choice riders. For example, technology-based customer service that will attract new riders would ideally include a website with a mobile interface that is easy to navigate and includes an interactive trip planner and real-time bus arrival information.

This chapter begins with a discussion of how marketing strategies can be integrated into HATS operations, followed by an overview of the many opportunities for service improvement offered by rapidly evolving transit technology.

9.1 A Marketing Framework

Achieving the goals set forward in this document will require marketing strategies focusing on the “Five Ps” of marketing included in the widely used “Marketing Mix” model. The marketing mix combines the roles different elements play in promoting products and services and delivering those products and services to customers.

In Helena, as in communities across the nation, need and demand for public transportation is increasing at the same time that local, state and federal government resources are being squeezed. This challenge requires public transportation providers to be both entrepreneurial and efficient. The most efficient way to serve transportation disadvantaged populations is by designing a service that meets their needs at the same time that it meets the needs of commuters and other choice riders. Achieving this goal requires entrepreneurial strategies based on principals of the marketing mix. Public transportation competes against personal vehicle use, and all of the following five marketing elements must be integrated to create a viable and attractive alternative for choice riders.

- 1) Product** – The products or services offered to your customer: Their physical attributes, what they do, how they differ from your competitors and what benefits they provide.
- 2) Price** – How you price your product or service so that your price remains competitive but allows you to operate in a financially sustainable manner.
- 3) Place** (Also referred to as Distribution) – Where your business sells its products or services and how it gets those products or services to your customers.
- 4) Promotion** – The methods used to communicate the features and benefits of your products or services to your target customers.
- 5) People** – the level of service and the expertise and skills of the people who work for you, and how they can be used to set you apart from your competitors.

A transit service's top priority should be coordinating with a broad range of partners to provide high quality bus service that meets marketing goals for product, price, place/distribution, and people. Providing convenience and a positive customer experience are essential elements of these marketing goals. At the same time, investing in promotion should be an important secondary focus.

A transit system can be viewed as a chain of interdependent components that can fail at the weakest link. Promotion and convenience are often two of the weakest links. We have seen many systems fall far short of their potential because the public has a low level of awareness of the services that are available. Failure to provide a positive experience and to market services can have a substantial impact on ridership and can significantly limit the effectiveness of the funding and staffing resources being invested in other aspects of the system.

9.2 Assessment of HATS Marketing

This section summarizes our assessment of HATS' current marketing, using the five marketing mix elements as a framework for the assessment. Overall, the level of effort and resources dedicated towards marketing HATS services should be increased. Establishing a budget for marketing would enable funds to be spent on these efforts. A marketing plan strategy should be implemented starting with small, manageable projects that address fundamental information and promotion needs. The first step is to develop easy-to-use materials such as timetables, maps and other essential service information. The next step is to ensure that this information is easy to find and use online and in hard copy in key locations in the community. The third step is to use publicity, advertising, and public relations strategies to leverage these fundamental information elements in the process of seeking new customers.

Product

HATS has a number of opportunities to improve the convenience and user-friendliness of its product. As discussed in detail in other sections, the most important improvements HATS can make to its product are better on-time fixed route performance, and installing bus stop infrastructure. It is also essential for HATS to continue good maintenance of its fleet so that customers feel that the buses are safe and clean. Technology such as a high quality website, trip planning and real time bus tracking capabilities are all important elements of a transit system's product, and as discussed in detail in the next section this is an area where HATS has significant opportunities for improvement.

Price

Our recommendations for changes to the fare structure should help encourage use of fixed route services while providing curb-to-curb service for those who cannot access the fixed route. Customers should be able to easily find information about purchasing bus passes and to be able to conveniently buy passes. Currently, this information is easy to find on HATS website. As HATS explores the potential for partnerships and contracts with large employers, human service agencies and others, these discussions should explore whether passes could be distributed through these partners.

Place/Distribution

As discussed in detail in other sections, HATS needs to expand its hours, days of service, areas of coverage and frequency of fixed route service. Additionally, if fixed bus stops are implemented, HATS

should work with the City and County to ensure safe and convenient bicycle and pedestrian access to all bus stops.

Promotion

Successful transit promotion requires an annual investment in a comprehensive, ongoing branding and promotional campaign that is developed by working with people experienced with transit marketing. Promotion includes a wide range of strategies and actions:

- **Effective branding, visibility and attractiveness of buses and facilities** – Other communities such as Bozeman have more effective branding, and many riders complain about the comfort of HATS buses. HATS facilities are attractive but hidden from the road. Visibility could be greatly improved with bus stop infrastructure.
- **Attractive hard copy materials** –HATS should have a brochure with maps, schedules and other information that is professionally designed and easy to understand. Hard copy promotional materials could also include post cards with a succinct promotional pitch designed for a target population along with HATS web address in bold type. Postcards are an inexpensive tool that can be distributed at community events and through key partners.
- **Free media and paid advertising** – Creative and well-targeted paid advertising can be effective. However, regardless of whether funding is available for advertising, HATS should cultivate relationships with local media and should always be looking for opportunities for media coverage.
- **Website** – New customers will use the web to research a transit service just as they would research any other product. The website is often where they will develop their first impression of the quality and professionalism of a transit service. Returning customers use the website to check schedules. Therefore, it is important to ensure that the website is inviting and easy to use.

People

Personnel who interact with the public in person or over the phone should be friendly, knowledgeable and trained to work with people with disabilities. HATS drivers are widely praised for their friendliness. Customers have noted the stress dispatchers experience as they try to do their job without the appropriate technology. Customers also have noted the lack of availability by phone in the early morning and late afternoon as well.

9.3 ITS & Website

Technology plays a critical role in effective customer communications, and internal management of daily operations as well as longer term planning decisions. It is tightly related to operations, performance monitoring, marketing, social media strategy, and good information design. The same technological capabilities that make it possible to provide accurate, user-friendly information to the public are also necessary for critical management challenges such as assessing on-time performance and deciding how to allocate resources when increasing or cutting service.

An intelligent transportation system (ITS) is the combination of technologies used to achieve these functions. Different software, hardware, spreadsheets, and back-end databases can be used as long as they are coordinated. Transit ITS will serve these needs most effectively if it is designed to integrate

accurate data that includes a description of services, routes, and timetables, as well as real time vehicle location. Ideally, ITS includes integration of the following three technology functions:

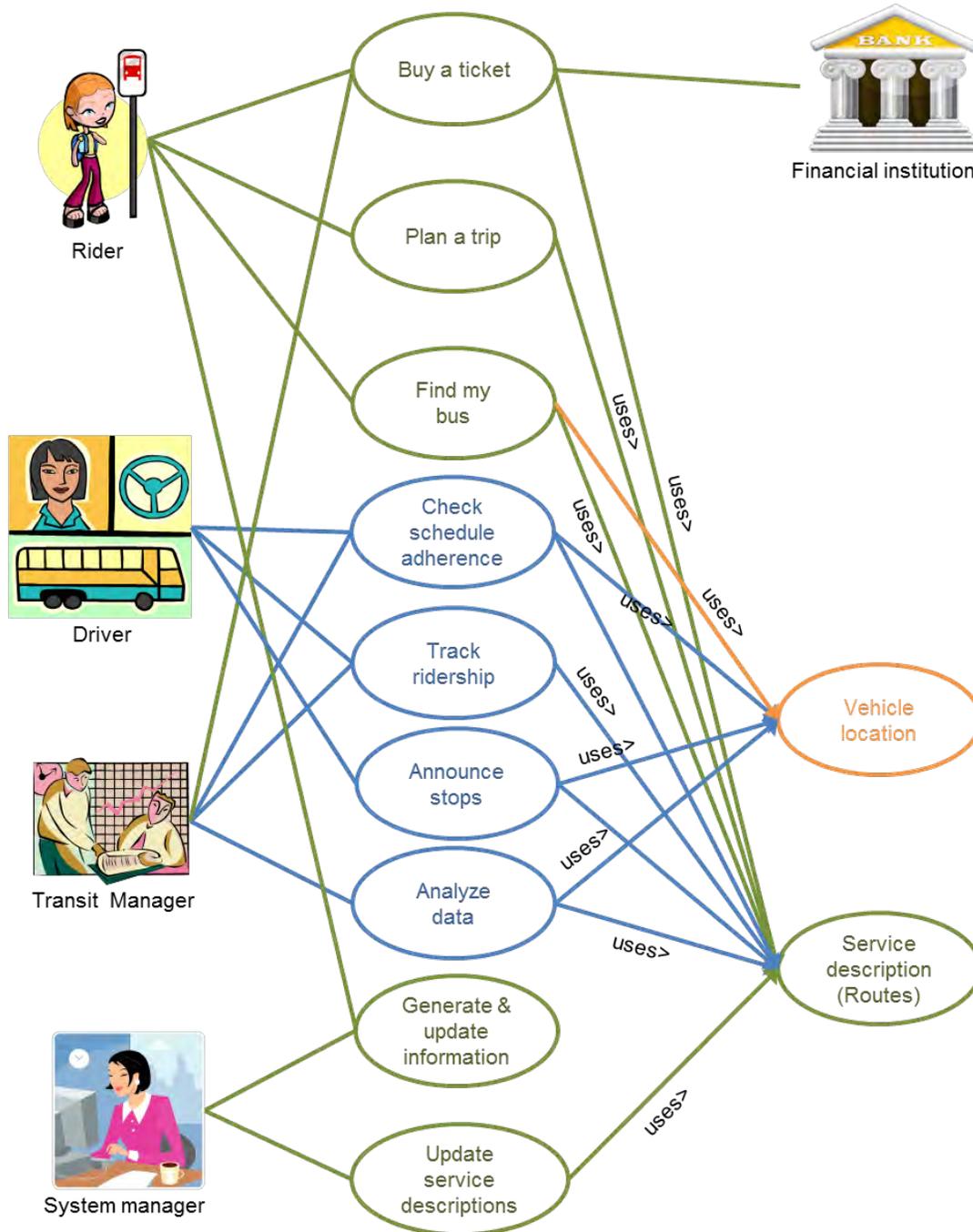
- rider information
- a transit management system
- automatic vehicle location

Table 9-1 lists common ITS user services for fixed route service technology as well as demand response management software.

Table 9-1: ITS User Services for Transit and Coordination

1	Travel And Traffic Management
1.1	Pre-trip Travel Information
1.4	Ride Matching And Reservation
1.5	Traveler Services Information
2	Public Transportation Management
2.1	Public Transportation Management
2.2	En-route Transit Information
2.3	Personalized Public Transit
2.4	Public Travel Security
3	Electronic Payment
3.1	Electronic Payment Services

Table 9-2 illustrates how technology can tie together the different needs and responsibilities of riders, drivers, transit managers, and system managers.



- Different interfaces for different users through different media, including mobile devices, Streamline web site, partner web sites, print media, and the transit operator,
- For fixed routes, service description is provided via GTFS feed; demand response requires different solutions

- Automatic Vehicle Location
- Rider information
- Transit management system

Figure 9-1: Diagram of technology uses.

Planning for ITS

Transit operators commonly invest FTA funding in a wide range of ITS applications. The success of these investments depends greatly on the quality of the planning and design that is done before the technology is implemented. A well-planned, well-designed ITS is an investment that easily pays for itself by saving a transit system significant amounts of time and money, while also improving service and operations at many levels. However, many transit systems have had the opposite experience because they did not invest in a good planning and design process before investing in technology.

Avoiding this scenario is more than just good practice, it is also a federal regulation. USDOT requires transit systems to use a systems engineering process when using FTA funding to design and implement transit management system technology. Simply stated, systems engineering is an integrated planning, design and implementation process that involves users and ITS developers in a team effort with the goal of providing a quality product that meets all user and technical needs. The process ensures the collaboration, iteration, and feedback that most ITS projects typically require between the design and implementation phases. It should be possible to scale and tailor the process to apply to projects of all sizes and complexity.

Unfortunately, this important federal requirement is widely ignored by transit systems that don't realize the high costs and equally big headaches that are likely to result. A study of costs for 44 projects found a 50% average cost overrun on projects without systems engineering, and a clear trend towards better cost performance with systems engineering. (FHWA-California Division and Caltrans, 2009) Systems engineering reduces the risk of schedule and cost overruns and increases the likelihood that the implementation will meet the user's needs. Other benefits include:

- improved stakeholder participation
- more adaptable, resilient systems
- verified functionality and fewer defects
- higher level of reuse from one project to the next, and
- better documentation

HATS Transit Management Tools

Like all transit systems we have worked with, HATS struggles with the challenge of managing and analyzing the large amount of complex financial data, service descriptions including miles and hours of service, and ridership data that must be combined to generate useful performance measures and other information. Data needs to be sliced in different ways for different purposes – a task for which HATS does not have adequate tools.

HATS primarily uses Excel spreadsheets to track ridership, costs, and all other data. For curb-to-curb and East Valley deviations, dispatch puts together the daily schedule in Word then marks up a printed copy as changes occur during the day, and communicates changes over the radio to the driver. At the end of the day, overall ridership counts are entered into a spreadsheet, but more detailed information such as locations of boardings and debarkings, or ridership by time of day, is not routinely captured. For Checkpoint, drivers tally rides by stop and time, and office staff enter that data into a spreadsheet at the

end of the day. Daily tallies are summed into monthly tallies in 12 files per year, then monthly tallies are summed into annual tallies in a separate file.

The tools for trip planning are limited to reading a printed bus schedule (or a pdf version on a web site), or calling the office to ask for assistance. Several calls per hour are from people asking about the expected arrival time of a bus.

The software costs for the current way of doing business is virtually nothing, and equipment costs for radios, telephone, and computers would be needed under any situation. However, the amount of staff time currently consumed by these tasks may be twice as high as it would be if a more sophisticated way of doing business was implemented. It is also important to note that customer service has suffered from the limitations of HATS current systems. A more sophisticated system, possibly as simple as a relational database, would cut down on data entry and provide a much richer, better organized set of data that would ease data analysis.

- **Ridership Analysis, cost-based performance measures, and Operational Reports** – Currently, spreadsheets can easily be assessed for ridership by time of day, month of year, and Checkpoint bus stop. However, compiling data for MDT quarterly reports is more challenging than it should be since data is pulled from too many spreadsheets. Route-level performance measures are not easily determined. This can be accomplished with well-organized spreadsheets, but a relational database would be a better tool.
- **On-Time Performance** – HATS does not currently have the capability to conveniently quantify on-time performance. There is no way to measure if buses are running within 5 minutes of the scheduled time at least 80% of the time. This can be accomplished with well-organized spreadsheets, but a relational database would be a better tool.
- **Real Time Tracking** – HATS does not have this capability. This requires an on-board GPS and computer.
- **Automated Stop Announcements** – HATS does not have the capability to do automated stop announcements on the buses, also described as “talking bus” capabilities. This requires on-board hardware that comes at the highest cost among the capabilities in this list.

GTFS – General Transit Feed Specification

Implementing the General Transit Feed Specification (GTFS) is one of HATS most significant opportunities to upgrade technology that will improve both service to the public and management capability. Formerly named the Google Transit Feed Specification, GTFS has become the most widely-used transit data standard in North America.¹ The same GTFS feed can be used for timetables, maps, a trip planner, “find my bus” capabilities, on-time performance reports, and other creative apps. Moreover, linking all these capabilities with the same GTFS feed minimizes errors and discrepancies between different public information tools such as printed schedules and web-based tools.

¹ “Standard Schedule Formats.” http://opentransitdata.org/wiki/index.php?title=Standard_Schedule_Formats. Accessed: 7 Jan 2010.

A good description of GTFS is available at <http://openplans.org/2012/08/the-openplans-guide-to-gtfs-data/>, summarized here:

“GTFS is just a data format. When data follows those guidelines, it’s called a GTFS feed. GTFS feeds give you an incredible amount of information about a transit system’s routes, stops, schedules, fares, transfers. The beauty of it is that it starts at the most disaggregated level (the arrival and departure time of every stop of every bus) and categorizes data upwards with a structure resembling a relational database with fields and rules to connect tables as primary and foreign keys would. The highly refined data is needed for a trip planner that tells you exactly when to leave your house to catch a bus. ”

Data formatted using GTFS runs practically every transit app offered by providers in North America.

We recommend immediate development of GTFS descriptions of bus routes, and sharing this data with Google in order to provide HATS customers with a trip planning capability.

When HATS is ready to invest in transit management technology, we strongly recommend purchasing a system that uses GTFS. Bozeman’s Streamline system invested in technology that does not use GTFS, resulting in shortcomings with on-time performance reports and ridership reports by stop, trip, time, and other data slices.

GTFS Development Process

There are different options for methodologies to develop GTFS data. However, regardless of the methodology used, it is important use one set of geographic databases for the GTFS, printed timetables, bus stop names and locations used by the transit management system, and data analysis. Sometimes we have used ArcGIS and Excel to manage data. More recently we have worked with a combination of Google Earth, Google Maps, Google Spreadsheets, and Excel. This software suite has fewer capabilities than ArcGIS but does not require investment in new software and allows collaborative data creation and review. Upon request, we can share our Google route development cheat sheet with HATS.

Open Data

GTFS also makes it easy to provide open data. As tracked by Open Plans, almost 85 percent of the transit miles traveled in the U.S. are done so on transit systems with open data. Meeting open data requirements is as simple as providing a link to a system’s GTFS. Providing open data is a way to make a contribution to the entire transportation community as this data can then be ingested into an ever growing set of apps from apartment searches to livability planning tools. Perhaps the most common question posed by organizations using and sharing GTFS data is, “What else can we do with this data?”

Google Transit

The original use of GTFS was Google Transit, the transit trip planner now integrated with Google Maps. The Google Transit trip planner seamlessly plans itineraries on fixed-route transit services in response to queries for business and place names, addresses, intersections, and desired departure or arrival time. Google Maps presents travel by transit as an option to Google Maps users who may not be

specifically looking for transit information, helping transit providers to reach new public transportation users.

Easy-to-use Traveler Information

This section summarizes several technology-based services HATS could offer or improve. Most of these services are web and mobile phone-based.

Web and mobile-accessible traveler information addresses many of the barriers to public transportation usage. Traditional printed transit maps and schedules confuse many travelers. In a University of South Florida Study, almost half of participants were unable to correctly plan a trip using maps and timetables.¹ In Contrast, online maps and directions are familiar, commonly-used tools. According to the Pew Internet & American Life Project, the third most common internet activity for Americans is to “search for a map or driving directions,” (86%) behind only email and using search engines.²

Website

The website is a transit system’s primary technology application. Besides the printed schedule, this is primary tool for information dissemination. In fact, many riders and potential riders will look for information on the website before they look at a printed schedule. Therefore it is important for a transit website to be designed with ADA compliance and a mobile interface.

Good website design for transit follows a few simple principles. The information that is most important to the rider should be “above the fold” at the top of the page. This can include a trip planner, a map of services, time tables, real-time bus location, and any special announcements about route or schedule changes.

The following table assesses the HATS website.

¹ "Design Elements of Effective Transit Information Materials," by the National Center for Transit Research at the University of South Florida.

² "Online Activites, Total." Pew Research Center's Internet & American Life Project
<<http://www.pewinternet.org/Trend-Data/Online-Activites-Total.aspx>>

Table 9-2: HATS Website Assessment

Element	Y/N	Status	Notes
Stand-alone website	N	Part of City of Helena web	Both branding and the ability to communicate important information are impaired by not having a stand-alone website. Most obviously, approximately one-third of the above-the-fold space is taken up by the City banner image and provides no useful information to riders. Even worse, the five big city navigation buttons are where you want your most important HATS navigation. Compare to www.buttebus.org
Important information above the fold on homepage	N	Many features are missing	Way too much text and it leads with history which is a very low priority. Navigation buttons on left are not in order of importance and worst of all, the very top button takes you to a different website (Walk Bike Helena). Also, there is no navigation back to homepage from other pages.
Trip Planner	N	Missing	HATS has not implemented GTFS so doesn't have capability to offer a trip planner. A trip planner powered by Google Transit should be a prominent feature on the home page, especially because many people have a hard time understanding even the best designed schedules and timetables.
Real Time Bus Tracking	N	Missing	HATS does not have this capability
Mobile Interface	N	Missing	HATS does not have this capability
Riders Guide: How to ride information	Y	FAQ format not ideal East Valley Bus left out of several answers	Because this is very important information – especially for first time riders – it should be as easy to read as possible. We recommend replacing the FAQ format with a “How to Ride” format that is standard on most transit websites such as the following good examples: www.mountainline.com/index.php/ride/ www.buttebus.org/rider-information/ http://actr-vt.org/riders-guide/#usingtheschedules
ADA Compliant Design	N	Some essential information is PDF only	The PDFs for Checkpoint and East Valley are not ADA accessible – not accessible by vision-impaired users. Resources for making websites ADA accessible include: http://usability.com.au/2005/06/accessible-data-tables-2005/#data

Element	Y/N	Status	Notes
			http://www.ada.gov/pcatoolkit/chap5toolkit.htm
Fare Information	Y	Easy to find and mostly easy to understand	“Checkpoint deviations” needs explanation, especially since the FAQ states, “the Check Point can not deviate from its scheduled route”
Route Maps	Y	Incomplete Checkpoint is good but there is no map for East Valley or Trolley	There should be maps for East Valley and Trolley. Each of the four services should have its own webpage that includes information and a map. While it is good to have PDF information available for download, all information should be available in HTML format to ensure ADA accessibility.
Schedules	Y	Checkpoint is good, but other info is incomplete and hard to understand.	Each of the four services should have its own webpage. On schedules page Trolley to Trails is in future tense with no explanation of what months it runs, what trail(s) it accesses, or when and where to catch a return ride. There is no link to Trolley page where much of this information is available – but only as a PDF. East Valley question marks should be eliminated. PDF flyer info should also be in HTML and needs to be easier to understand. Especially need better explanations of transfers and deviated stops.
Alerts: Route / Schedule changes	N	No clearly designated location for alerts	Alerts are generally posted on a transit system’s homepage, but there is no place for alerts on the HATS homepage and there is no navigation back to this page from other pages.
Images	N	No images anywhere	Pictures really are worth a thousand words and are one of the most effective ways to combat the stigma of riding the bus – the perception that “people like me” don’t ride buses, riders are all homeless people etc. Every page should have a relatively large photo, ideally with people in it, conveying the message that the bus is safe, modern, convenient, and clean. It would be a much better use of space than the current City of Helena banner.
Links	N	Links are either missing or	The page should link to intercity bus options and taxi services. This is also where the Bike Walk Helena link should be – instead of at top level of navigation. Similarly the link to the 2007 TDP

Element	Y/N	Status	Notes
		badly designed	should not be a top level navigation link but should be included on this page or on an “About HATS” page additionally, there should be some text explaining the importance of the TDP. Finally, links like Bike Walk Helena should open in a separate window instead of exiting the viewer out of the HATS website.
Quality Control	N	Inconsistent	There are a number of typos and inconsistencies, such as three different spellings for: Checkpoint, CheckPoint, Check Point. And two different Trolley descriptions “to Trails” and “Free Summer Youth”
Content Management System (CMS)	N	HATS staff cannot do in-house updates	A transit website should have an easy-to-use CMS that allows staff to quickly make changes and add updates to their website.

Our research found websites for small transit systems that included good design, content, language, imagery, etc. Following are the peer websites we considered to be particularly good:

- The Bus (Butte) buttebus.org
- Medocino Transit Authority <http://www.mendocinotransit.org/>
- Trinity Transit <http://www.trinitytransit.org/>
- Advance Transit (VT/NH) www.advancetransit.com/
- Addison County Transit Resources (VT) actr-vt.org/
- Arcata & Mad River Transit System and Eureka Transit System (CA) www.arcatatransit.org/ and www.eurekatransit.org/ - These are sister systems that use the same web design.
- Cache Valley Transit District (UT) cachebus.org/
- Mountain Line (Missoula) www.mountainline.com

Larger public transportation operators serve as good models. Portland’s Tri-Met system has a reputation of leading the country in technology deployment and information design <http://trimet.org/index.htm>. We particularly like some elements of the website for Mountain Line in Flagstaff, AZ www.mountainline.az.gov. While other websites may offer more polished graphic design, Mountain offers some best practices that can be deployed in smaller systems such as:

- Trip planner above the fold
- Includes all pertinent information about the service, with a focus on how to use the bus
- Route status via Twitter, along with active Facebook presence
- Timetables that are easy to understand
- Good rider’s guide

Timetable Design

Table 9-4 shows a timetable from the Flagstaff, AZ transit system website that could serve as a model for HATS to provide information in a manner that is easier to understand. Like HATS, the buses on this route stop at each stop at the same time each hour. This timetable accommodates higher frequency during peak hours, and they use a vertical layout for their timetables. Note they follow the common practice of using boldface for afternoon times. Timetables are split into two logical out and back divisions. This was the approach the Current Transportation team took in Butte when for the redesign of timetables in 2012.

Route 2 Timetable and Service Area Map						
ROUTE 2 – BLUE ROUTE						
Downtown Transfer Center to Flagstaff Medical Center and Flagstaff Mall Transfer Center (via Cedar Av. and Lockett Rd.)						
STOP / LOCATION	MONDAY – FRIDAY				WEEKENDS & HOLIDAYS	
	ALL DAY	PEAK ONLY	FIRST BUS	LAST BUS	FIRST BUS	LAST BUS
1 Depart Downtown Transfer Center	:15	.45	6:15A	9:15P	7:15A	7:15P
2 San Francisco St. / Birch Av.	:18	.48	6:18A	9:18P	7:18A	7:18P
3 San Francisco St. / Elm Av.	:19	.49	6:19A	9:19P	7:19A	7:19P
4 San Francisco St. (Flagstaff Medical Center)	:21	.51	6:21A	9:21P	7:21A	7:21P
5 Forest Av. /Turquoise Dr.	:23	.53	6:23A	9:23P	7:23A	7:23P
6 Cedar Av. / Gemini Dr.	:24	.54	6:24A	9:24P	7:24A	7:24P
7 Cedar Av. / West St. (Coconino High School)	:26	.56	6:26A	9:26P	7:26A	7:26P
8 Cedar Av. / Aris St. (Salvation Army Store)	:28	.58	6:28A	9:28P	7:28A	7:28P
9 Lockett Rd. / King St.	:29	.59	6:29A	9:29P	7:29A	7:29P
10 Lockett Rd. / Alta Vista Dr.	:30	.00	6:30A	9:30P	7:30A	7:30P
11 Lockett Rd. / Fanning Dr.	:31	.01	6:31A	9:31P	7:31A	7:31P
12 Kaspar Dr. (NAIPTA Facility)	:32	.02	6:32A	9:32P	7:32A	7:32P
13 Lynch Av. (FUTS Trail)	:33	.03	6:33A	9:33P	7:33A	7:33P
14 Arrive Flagstaff Mall Transfer Center	:38	.08	6:38A	9:38P	7:38A	7:38P
Flagstaff Mall Transfer Center to Flagstaff Medical Center (via Lockett Rd. and Cedar Av.) and Downtown Transfer Center						
14 Depart Flagstaff Mall Transfer Center	:45	.15	6:15A	9:45P	7:45A	7:45P
15 Cummings St. / Lynch Av.	:47	.17	6:17A	9:47P	7:47A	7:47P
16 Kaspar Dr. (NAIPTA Facility)	:48	.18	6:18A	9:48P	7:48A	7:48P
17 Lockett Rd. / Fanning Dr.	:49	.19	6:19A	9:49P	7:49A	7:49P
18 Lockett Rd. / Manor Rd.	:50	.20	6:20A	9:50P	7:50A	7:50P
19 Lockett Rd. / Alta Vista Dr.	:51	.21	6:21A	9:51P	7:51A	7:51P
20 Lockett Rd. / King St.	:52	.22	6:22A	9:52P	7:52A	7:52P
21 Cedar Av. / Fourth St. (Cedar Plaza)	:53	.23	6:23A	9:53P	7:53A	7:53P
22 Cedar Av. / West St. (Safeway)	:54	.24	6:24A	9:54P	7:54A	7:54P
23 Cedar Av. / Gemini Dr.	:55	.25	6:25A	9:55P	7:55A	7:55P
24 Forest Av. / Turquoise Dr.	:57	.27	6:27A	9:57P	7:57A	7:57P
25 Beaver St. (Flagstaff Medical Center)	:00	.30	6:30A	10:00P	8:00A	8:00P
26 Beaver St. / Hunt Av.	:01	.31	6:31A	10:01P	8:01A	8:01P
27 Beaver St. / Birch Av.	:02	.32	6:32A	10:02P	8:02A	8:02P
1 Arrive Downtown Transfer Center	:06	.36	6:36A	—	8:06A	—

Figure 9-2: Sample Timetable from Flagstaff

An alternate model is used by Portland's Tri Met system http://trimet.org/schedules/w/t1100_1.htm and Missoula's Mountain Line <http://www.mountainline.com/index.php/schedules/weekday/newroute01/>, which organize schedule information by stop rather than by route. TriMet's website allows the user to switch to an organization by stop.

Map Design

The team prefers having one map that shows all routes, as well as individual maps for each route. The individual maps can contain the stop sequences used in the timetable. These should be coordinated with the stop ID's used for the texting capabilities of the real-time information system once these technologies are implemented.

Data Problems

When a central data set is not being used for all schedules and maps there are errors and inconsistencies in stop names between information sources. The solution is to generate timetables and maps from the same GTFS and GIS database that feeds schedule information to other applications. The TimeTable Publisher first developed by TriMet is one option, but may be more than is needed for HATS.

The overall data management solution likely will include a suite of Google Maps, Google Earth, Google spreadsheets, Excel spreadsheets, Access or PHP/MySQL database, and ArcGIS. Upon request Current Transportation can share its instructions, last updated in May 2012, for using these tools in managing and planning bus routes and stops.

Quality Control

Once the data for maps, stops, and timetables are accurate, someone with good graphic design and information skills can polish the maps and complete the needed products using graphic design software such as Adobe Illustrator. However, quality control is still necessary to avoid errors.

Automated Stop Announcements

Almost all large transit systems and many of the larger systems in Montana, including Missoula Mountain Line, now have automated, on-board, audio stop announcements with related on-board features such as lighted signs announcing stops. These capabilities also can be built into the purchase of 12-year buses.

Doing the ADA-required stop announcements is an ongoing challenge for HATS drivers. These announcements are important for new riders who are unfamiliar with routes as well as for people with disabilities.

10 Funding Needs and Alternatives

Approximately 60% of the Helena Area Transit Service (HATS) operating budget is from the Federal Transit Administration (FTA), administered through the Montana Department of Transportation (MDT). The City of Helena is one of 34 local governments or non-profit organizations in Montana qualified to provide general public transportation. FTA matching requirements are flexible, allowing for public or private contributions from local, state, or non-DOT federal sources. Helena’s non-DOT match is the minimum required in Montana for the FTA Section 5311 Rural General Public Transportation Formula Grant. Some communities exceed the minimum 40% local match in order to provide more transportation than the allocation of FTA grants allows.

The City of Helena’s Fiscal Year 2012 budget for public transportation was \$1,460,973. Of that, \$976,488 was the operating budget for the weekday HATS services.

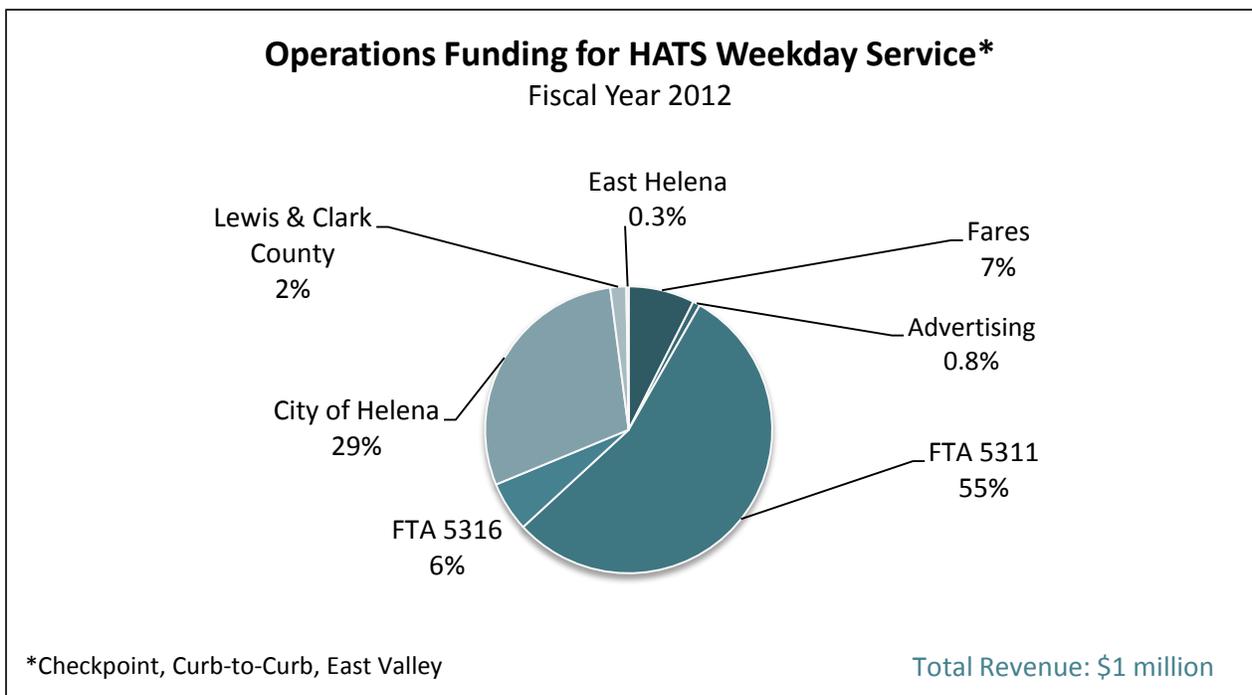


Figure 10-1: Approximate Distribution of Revenue (excludes Trolley, Intercity, Head Start and Rocky Mountain service)

Using the cost allocation model described in Section 4.5, the approximate costs for core services are:

- **Helena Checkpoint:** \$215,542 or \$6.29 per ride
- **Helena Curb-to-Curb:** \$586,785 or \$18.28 per ride
- **East Valley Bus:** \$174,162 or \$9.08 per ride

The remaining \$484,485 supports the following services that are not part of the City's general public services:

- RMDC Senior Transportation: \$129,910
 - FTA 5317 New Freedoms: \$95,234
 - Lewis & Clark County: \$34,676
- Head Start: \$76,485 – funded by Head Start
- Intercity Bus Depot Operations: \$86,287
 - Commissions from ticket sales included in Helena Bus fares
 - FTA 5311(f) Intercity Bus: \$25,000
 - City of Helena: \$30,000
- Capital Outlay (transit facility construction): \$189,798
- Other income/expenditures: \$1,915

HATS FY13 Projected City General Fund Contribution is \$344,328. Note that this is the required “match” to receive the FTA 5311 Rural General Public funds. The County's contribution is the match for the FTA 5316 Job Access and Reverse Commute (JARC) funds for East Helena. HATS FY13 Projected City General Fund Contribution is approximately 2.7% of the \$12,472,956 combined total FY13 budgets for Parks, Police, Courts, Fire and Community Development.

HATS received no state funding in FY 2012 and approximately \$50,000 in FY 2013. Montana ranks 46th out of 51 states and districts with less than \$1m of state-level funding. By comparison, California state funding, second highest in the country, generated \$1.8 billion in FY 2013, or \$47.32 per capita (\$1.3 million for a community of Helena's size). This does not include federal or local money spent on transit in the state. In exchange for receiving state dollars, California transit agencies must meet or exceed a farebox recovery ration, set at 10% for rural systems. At 7% farebox recovery ration, HATS is lower than the 10% target for rural systems in California. Other states with farebox targets have significant state investment. Neither FTA nor the State of Montana set farebox recovery ratio targets.

10.1 FTA Funding

In addition to local investment, HATS receives Federal Transit Administration funding, administered through the Montana Department of Transportation. FTA administers the following programs that provide funding for small urban and rural transit systems:

- Section 5309 – Major Capital Investments. Eligible capital projects include the purchasing of buses for fleet and service expansion, bus maintenance and administrative facilities, transfer facilities, bus malls, transportation centers, intermodal terminals, park-and-ride stations, acquisition of replacement vehicles, bus rebuilds, bus preventive maintenance, passenger amenities such as passenger shelters and bus stop signs, accessory and miscellaneous equipment such as mobile radio units, supervisory vehicles, fare boxes, computers and shop and garage equipment.
- Section 5310 – Transportation for Elderly Persons and Persons with Disabilities. Eligible capital expenses are those that support transportation to meet the special needs of older adults and persons with disabilities.

- Section 5311 - Formula Grants for Other than Urbanized Areas. Provides funding to States for the purpose of supporting public transportation in rural areas with population of less than 50,000.
- Section 5316 – Job Access and Reverse Commute (JARC). This program was created to address the unique needs of welfare recipients and low-income persons who need access to transportation to seek and maintain employment. Eligible activities under this program include capital, planning and operating expenses for projects that transport low-income individuals to and from jobs and activities related to employment, and for reverse commute projects. (merged into Section 5311 under MAP-21)
- Section 5317 – New Freedom Program. The New Freedom grant program provides additional tools for Americans with disabilities to overcome barriers preventing full participation in society and integration into the work force. Lack of adequate transportation is a primary barrier to work for individuals with disabilities. This program seeks to expand transportation mobility options available beyond those required by the Americans with Disabilities Act (ADA) of 1990. Eligible expenses include capital and operating costs related to new transportation services and new public transportation alternatives designed to assist individuals with disabilities. (merged into Section 5310 in MAP-21)

The Federal Transit Administration (FTA) allows for non-transportation federal funds to act as local match to FTA funds. The Program Guidance for **Non-urbanized** Areas (Federal Transit Administration, 2007) provides broad, inclusive language about this tool. Refer directly to the guidance for specific language.

FTA funds can match more than 50% of transit costs. In states such as Montana with significant amounts of federal lands, SAFETEA-LU introduced a sliding scale match formula based on the amount of federal land in a state. This match ratio is continued in MAP 21. When adequate funds are available, the FTA 5311 program can cover 54% of the net operating cost of non-urbanized systems in Montana, 70% of administrative costs, 80% of maintenance costs, and 86% of the cost of capital purchases. For all FTA programs, the balance of funds for operations or capital must come from “local” sources, which includes state, county or city, business, and community funds as well as non-transportation federal sources. Unlike many states with highly effective transit systems, Montana has almost no state funding.

Before applying formulas for reimbursement, farebox revenue is subtracted to obtain a net operating deficit. Farebox revenue includes bus passes purchased with federal funds from jobs programs, Medicare, and services for people with disabilities. Bus passes can be purchased in bulk by social service agencies and non-profit organizations. Contracted services using this funding are not included in farebox revenue, but are rather considered “local” funding. For HATS, farebox revenue covers about 7% of total costs, a value typical of smaller systems.

10.2 Changes to Federal Funding Under MAP-21

The new Federal transportation bill is known as MAP-21, which stands for Moving Ahead for Progress in the 21st Century Act. MAP-21 became effective on Oct. 1, 2012 and will remain in effect until Sept. 30,

2014. Funds already obligated for these programs may be expended for current JARC and New Freedom projects through Sept. 30, 2015.

The following information from (Partnership for Mobility Management): summarizes changes to relevant federal funding programs under MAP-21. The MAP-21 legislation is on the web at <http://www.govtrack.us/congress/bills/112/hr4348> and FTA has posted frequently asked questions about the legislation at <http://www.fta.dot.gov/map21/>.

Mobility Management and Coordination

Under MAP-21, mobility management is considered a capital expense, eligible for 80 percent federal funding. The definition of mobility management is unchanged from current transportation law, SAFETEA-LU provisions. Mobility management continues to be an eligible capital expense in every Federal Transit Administration (FTA) grant program other than Section 5309.

Coordination with human services will remain a requirement for FTA grantees across the range of all non-rail FTA programs. Coordination with human services continues to be a requirement of statewide and metropolitan transportation planning, and coordination of service delivery continues to be a requirement in all three core FTA grant programs as authorized by MAP-21: Section 5307, 5310 and 5311.

JARC and New Freedom

Significant changes in MAP-21 include the end of both JARC (Job Access and Reverse Commute) and New Freedom as distinct programs. Both survive as eligible activities. JARC-type projects will be eligible activities under the rural (Section 5311) and urban (Section 5307) funding provisions. New Freedom-type projects will be allowable under Section 5310 regarding seniors and people with disabilities.

JARC activities are given a new definition in MAP-21: "Job access and reverse commute project" means a transportation project to finance planning, capital, and operating costs that support the development and maintenance of transportation services designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to their employment, including transportation projects that facilitate the provision of public transportation services from urbanized areas and rural areas to suburban employment locations." (The [old definition](#) under SAFETEA-LU was slightly different, with specific language about vouchers and transit passes.) Vanpool vehicles are now included as permissible expenses.

Rural, Small Urban and Other Urban Areas

In general, there are no significant changes to the eligible uses of FTA funds for capital or operating assistance in either the rural (Section 5311) or urban (Section 5307) grant programs. One new feature under MAP-21 affects grantees in urban areas over 200,000 in population. For those areas with above 200,000 in population, FTA funding for operating expenses will be determined according to a sliding scale -- with 75 and 100 buses as benchmarks. The more buses, the smaller the percentage of FTA funds that may be used for operating expenses. For the most part, areas designated as above 200,000 in population with more than 100 buses will not be eligible to use Section 5307 funds toward operating expenses.

Expansion of 5310 Program

Section 5310 will include more eligible activities to enhance mobility for seniors and people with disabilities. These activities are (1) former New Freedom activities -- improvements that exceed the requirements of the *Americans with Disabilities Act* (ADA); (2) public transportation projects to improve access to fixed-route transit; (3) public transit projects expressly designed for seniors and people with disabilities, where transit is insufficient, inappropriate or unavailable; and (4) alternatives to public transportation that assist seniors and people with disabilities. "Public transportation projects to improve [seniors' and disabled persons'] access to fixed-route transit" is a newly eligible use of Section 5310 funds.

Whether urban or rural, 55 percent of Section 5310 funds will need to be spent on capital projects that address transportation needs of seniors and persons with disabilities. As was the case under SAFETEA-LU, all Section 5310 projects must be derived from locally developed, coordinated public transit-human services transportation plans.

Section 5310 funds will be apportioned as follows. Sixty percent of funds are apportioned to urbanized areas over 200,000 population; 20 percent of funds are apportioned to states for their urbanized areas of less than 200,000 population, and 20 percent of are apportioned to states for their rural areas.

10.3 Funding Opportunities & Alternatives

Transit system revenue comes from a combination of federal, state, and local funding sources plus farebox revenue. When adequate funds are available, the FTA can cover 50% of the net operating cost of small urbanized transit systems and 80% of the cost of maintenance, administration, and capital purchases. For all FTA programs, the balance of funds for operations or capital must come from "local" sources, which includes state, county or city, business, and community funds as well as non-transportation federal sources.

Before applying formulas for reimbursement, farebox revenue is subtracted to obtain a net operating deficit. Farebox revenue includes bus passes purchased with federal funds from jobs programs, Medicare, and services for people with disabilities. Most of these bus passes are purchased in bulk by social service agencies and non-profit organizations. Contracted services using this funding are not included in farebox revenue, but are rather considered "local" funding.

It appears that, at the very least, coordination could result in the "claiming" of "local funds" that would allow for utilization of FTA funds that cannot currently be matched FTA funding.

Funding is another major challenge, with the lack of a dedicated funding source for transit and a very tight budget at the state and local levels. In 2010 a Greater Helena Area Transit district petition drive failed to secure enough signatures to be placed on the ballot for the November general election. The district was proposed to provide public transit to a larger area of the Helena community including areas north and east of the City of Helena.

Non-FTA Federal Funding

The Federal Transit Administration (FTA) allows for non-transportation federal funds to act as local match to FTA funds. The Program Guidance for **Non-urbanized** Areas (Federal Transit Administration, 2007) provides broad inclusive language about this tool. Of these funding sources, Community Development Block Grants (CDBG) are one of the easiest to work with.

Medicaid

Fixed route and demand response providers should explore the potential for partnering with any social service providers who receive Medicaid funding for transportation – especially the Department of Health and Human Services (DPHHS). Medicaid transportation funding is a significant potential funding source, but unfortunately it is also one of the most difficult to work with.

Nationally, Medicaid transportation expenditures are second only to FTA’s transportation funding. The \$3 billion spent by Medicaid in FY2006 for non-emergency medical transportation represents a small portion of Medicaid’s budget, but almost 20 percent of the entire federal transit budget. (Rosenbaum, Lopez, Jorris, & Simon, 2009)

Medicaid is a joint program between the states and the federal government to provide medical care for the poor and disabled. It provides funding for non-emergency medical transportation (NEMT), as well as transportation for people with developmental disabilities and some senior transportation services such as programs to prevent seniors from being placed in nursing homes. Much of the transportation funded by Medicaid is for individuals with physical or developmental disabilities who are unable to transport themselves to medical appointments. Transportation for people with developmental disabilities can include group transportation to education, jobs, and human services.

DPHHS and other agencies and non-profits may use Medicaid funding to purchase individual rides or contract for group rides depending on the specific program involved and the purpose of the ride. However, public transportation providers typically encounter a number of barriers to providing these rides. State level Medicaid officials operate under federal policies that prioritize cost effectiveness over quality of service and tend to be primarily focused only on finding the cheapest rides for patients. Benefits of coordination are not systematically factored into their decisions and are rarely incorporated. Additionally, in cases where individual rides are being purchased, it is generally not possible to arrange for Medicaid to pay the full cost of the ride. Medicaid funding for NEMT on fixed route services cannot be contracted and can only be used on a per-ride basis, so there is no mechanism for Medicaid to pay for the remaining cost of the ride beyond the fare. Similarly, in some cases Medicaid has been known to only pay the farebox for a demand response ride, which covers even a smaller portion of the actual cost of the ride.

Nonetheless, in spite of these barriers Medicaid offers potential funding opportunities for HATS. HATS is not an approved Medicaid provider and does not have systems capable of billing Medicaid per trip. In spite of this status, HATS is likely providing many Medicaid rides to clients who are then reimbursed by Medicaid for their farebox costs. If HATS became an approved provider, there would be two potential benefits:

- HATS could contract to provide non-NEMT services.
- For NEMT services that cannot be contracted, HATS could be reimbursed on a per-mile basis which would cover the full cost of the ride.

To determine how realistic these potential benefits are, HATS would need to discuss these issues and opportunities with regional Medicaid officials, DPHHS officials and local Human Service providers who receive Medicaid funding.

Local 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

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. It is important to note that when discussing these options with a partner, a third 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. Common partners for contracts and direct contributions include:

- **Universities, Colleges and other Educational Institutions** – In many communities around the nation students, faculty and staff ride fare-free on local transit through contracts or contributions. In many cases these agreements provide significant funding to local transit providers. Funding may come directly from the college, from a fee approved by the students or a combination of both sources.
- **Social Service Agencies and Non-Profit Organizations** – Agreements with social service agencies and non-profits can be structured in several ways. In addition to contracts, and contributions, another option 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.
- **Large Employers** – In many communities around the country, large employers contribute or contract with local transit providers for service for their employees.
- **Commercial Centers** – Large commercial centers such as malls may be willing to enter into contracts for employee transportation service. Additionally, they may be willing to contribute toward increased frequency of service that will benefit their customers and potentially increase business.

Increased Fares Option

While there are policy reasons to increase fares, this is not a viable tool for significantly increasing funding. Fares should be set based on a rate the community deems acceptable and to reach a target farebox recovery ratio, such as 10%.

10.4 Developing a Contract for Services: Fare for a ride vs. Contract for Services

Montana Department of Public Health and Human Services (DPHHS) is working with willing Montana public transportation providers to improve the method of payment for transportation services. Under the standard way of doing business, an HHS counselor will purchase a monthly bus pass for a client, which the public transportation provider counts as a fare. Instead, a contract for services offers some key advantages. A key element for success is to target a contract for services away from demand response and towards fixed routes, flex routes, or coordinated service routes.

Most Montana general public transportation systems strive to recover a small percentage of their costs through passenger fares. Fares are typically set low to encourage public patronage and are usually subsidized through federal, state, and local funding. In general, fares are set to recover a specific portion of operating costs for general public transportation, dependent upon the level of other funding available for subsidization. The fare for a ride is usually one way from point A to B then another fare is collected for a return ride. The general public provider counts this as a fare from passengers and cannot use that money for local match to any Federal Transit Administration (FTA) grants.

A contract for services with a DPHHS program allows a general public transportation provider to use the contract amount as local match to FTA dollars; ideally it can be a small revenue source for service expansions. The same sort of contract can also be used for coordination with taxi companies for evening and weekend service to HHS customers.

A contract for services requires an agreement between the general public provider and DPHHS as shown in Appendix E. Sample bus passes associated with the contract are also included.

When considering contract specifics, the HHS provider will be given the following guidance:

- Review 2-3 years' expenditures on bus passes to determine a fair contract amount.
- Arrange monthly or quarterly invoicing and payment.
- To meet HHS rules for individualized service plans, tie the contract for service to a client by assigned number.

11 Goals, Objectives and Implementation Actions

Overall, HATS is providing a service that is valued by community members. However, based on the extensive public and stakeholder input collected as part of this project, it is clear that there is a strong desire in the community to see HATS improve and expand its service. In particular, there is significant demand for more fixed route service designed to serve commuters and other choice riders in addition to the transportation disadvantaged populations who currently make up the majority of HATS current customers.

11.1 Summary

One-year and five-year goals, objectives and implementation actions are designed to guide HATS in its ongoing transition from a “safety net” transportation service to a community transit system that provides quality service to the broadest possible range of riders, especially those with the greatest need. These recommendations address areas of HATS service and operations where this planning process has identified opportunities for positive changes. The objectives are based on the following intentions:

- Service design
 - A shift to more fixed route services
 - Limiting curb-to-curb for people with disabilities within $\frac{3}{4}$ miles of fixed route would reduce costs, since demand response services tend to have the highest cost per ride
 - More fixed route service would increase general public ridership because the need to call the day before is eliminated, and service is more traditional
 - Build service and resources first within the Helena core and the jurisdiction that funds the service.
 - Identify a platform to extend to a county wide or valley wide system. Transportation needs expand beyond political boundaries but funding is currently strongly from within city limits.
 - Longer hours, weekend service, grocery trips, food bank, and airport service
 - Better service and coordination with Carroll College, Helena College, St. Peter’s Hospital, Shodair Children’s Hospital, the Veterans’ Affairs Hospital, state employers, and other major employers
 - Better define where curb-to-curb services can be provided and under what circumstances.
- Funding
 - More robust local financial funding. Currently local match is from the City’s general fund. Options to consider include an Urban Transportation District, parking fees, and increased investment from non-traditional partners such as schools, hospitals, and employers.
 - Review the rate structure to encourage use of fixed route service

- Move away from using transit dollars to subsidize door-to-door transportation for able bodied students for \$1 as an alternative to the higher priced school bus service.
- Develop a methodology for determining an equitable cost allocation among funders, and between services.
- Bus and bus facilities
 - Stops and shelters
 - Fleet makeup (1-5 years)
 - Reduce maintenance costs
- Management, marketing, and coordination
 - Technology including web presence
 - Considerations of where HATS should be technologically. Service should be more user friendly, and tasks should be more automated. Technology could help avoid the need to transition from one dispatcher to two. Overall, the goal is to spend more time driving and have better data management
 - Other marketing and outreach
 - Coordination: coordinate across the multiple sources of funding, and operationally take actions to reduce buses and vans from HATS, the school district, and human service agencies following each other between the same origins and destinations. Be more efficient while following federal, state, and local rules, programs, and procedures that affect how public transportation can be used to transport pupils, Medicaid patients, veterans, and other groups of people who need transportation. For example, HATS makes 15-20 trips a day to St. Peters Hospital but none to the Fort Harrison Veterans Administration just outside city limits. Coordination efforts are constrained because VA provides its own transportation.
 - Impact of changes on staffing (currently 18 drivers (6 Full time) and 2 intercity agents).
- Transportation and land use
 - Relationship between HATS, land use decisions, complete streets, biking and walking, and other tools to reduce single occupancy vehicles and vehicle miles travelled.
 - Coordinate information dissemination among different partners

As part of this Transportation Development Plan, HATS refined its mission statement and also developed a vision for HATS in 2020. In support of the mission and vision, HATS has identified three major goals.

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.

11.2 Implementation

Eight objectives were determined based on the needs of the Helena area to address the mission, vision, and goals, as outlined in the table below. Actions were assigned to Year 1, or to Years 2-5.

Table 11-1: Implementation Actions

#	Action	Timeline	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
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	Timeline	Page Number
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 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

11.3 One-Year Actions

The project team believes the following actions can be accomplished in the next year within the current budget and operational structure. These actions are broad-ranging and address high priority needs and opportunities. They were chosen because of the significant service improvements they can achieve; the urgency indicated by survey, stakeholder, and public input; or because they can be completed with minimal time invested. Each objective is discussed in detail under its corresponding five-year goal.

Objective 1: Implement service changes

The team recommends Year 1 service changes aimed to improve on-time performance and offer service in a more cost effective manner. Year 1 actions improve the ratio of fixed route miles to curb-to-curb miles, focusing curb-to-curb on those who need it and expanding fixed route to better serve the entire population. Changes in Years 2-5 build upon the Year 1 fixed route foundation by expanding hours or frequency depending on budget and community priorities.

Action 1.1: Add a route and make route and schedule adjustments to improve on-time performance, better meet commuter needs, and improve safety.

Our public outreach (Chapter 7 and Appendix B) and our system analysis (Chapter 3) strongly support additional fixed routes in general, and specifically for the west side of Helena to the Capital Complex. Proposed new routes introduce service into the relatively densely populated residential west side neighborhood. In addition, route modifications should improve on time performance.

The cost of operating 3 buses on fixed routes, 12 hours per day, weekdays only, is approximately \$664,000. With no budget change this would leave about \$313,000 budget for curb-to-curb. Operating four buses on fixed route would cost approximately \$885,000.

Two route concepts have been developed. Option A can operate with 3 buses and consists primarily of linear routes. The routes expand the coverage area from 43% of the city's population, to 55% Level of Service E as described in the discussion, "Availability: Service Coverage" on page 5-2 . Option B can operate with 3 buses or 4. Because it uses loop routes a larger percent of the population has access to bus service (65%, meeting the target LOS D). The tradeoff is longer travel times, reducing attractiveness to commuters. With a loop route, the travel time in one direction can be 10 minutes in one direction, but 50 minutes in the other direction. This can be mitigated by putting a second bus on a loop route, traveling in the opposite direction. Therefore, if funding permits 4 buses we recommend putting a second bus traveling in the opposite direction of the orange town route in Option B.

In Option A the west side blue route uses Euclid, but in Option B it uses neighborhood roads on the west side. In general we don't like loops, but for the west side it could be a good choice since Euclid is not pedestrian friendly, and setting up bus stops would be challenging. Options for serving downtown and the Great Northern Center also vary. These elements can be interchanged between Option A and B.

Figure 11-1 shows Option 1A. A west side route is added, checkpoint is reimagined into "Town to Market", and East Valley turns into a more focused U.S. 12 East Helena route that can operate on time.

Table 11-2 shows a rough outline of some of the stops, their distance from the route stop point and the estimated travel time (assuming 12 miles per hour). This data can be converted into a timetable. On the right side of the table is a sketch of vehicle rotation between the routes.

This can be accomplished with no or minimal additional funding if curb-to-curb is refocused towards seniors and people with disabilities who cannot access fixed route service. Political leadership will be needed to focus on long-term improvements, as riders and community members will initially express concerns and complaints regarding the new way of doing business. After an initial phase of adjusting to the changes, most current riders will find that an on-time fixed route service with expanded coverage is more convenient than having to call in a day ahead of time. At the same time, new riders will be attracted to the service. For those who do not have the ability to access the fixed route service, curb-to-curb will still be available.

As an alternative HATS can maintain its generous but costly open door policy for curb to curb. If this choice is made, the existing check point and East Valley services cannot adequately improve on-time performance without additional funding or cutting the routes by 25%. It also would not be possible to add a westside route.

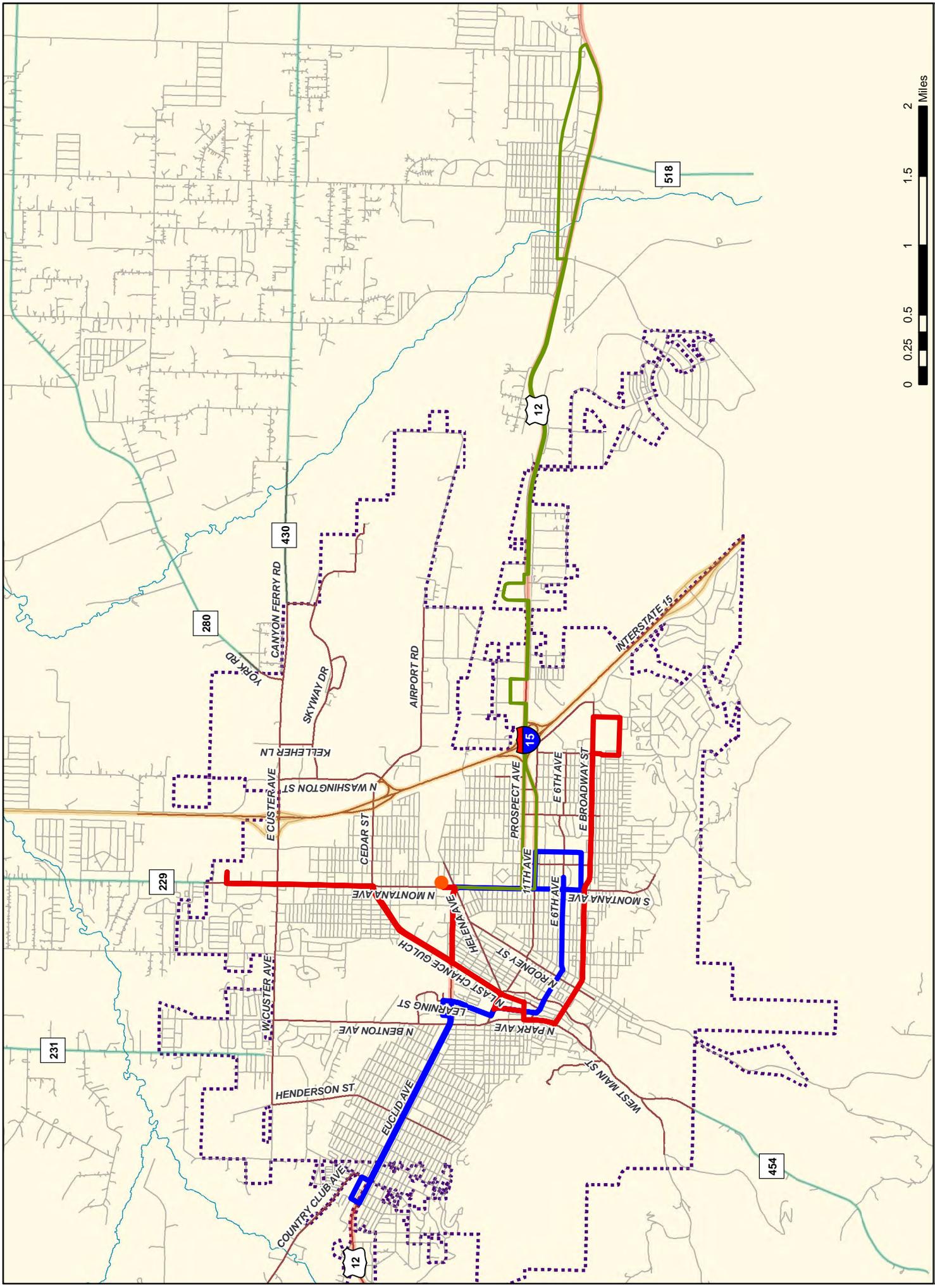
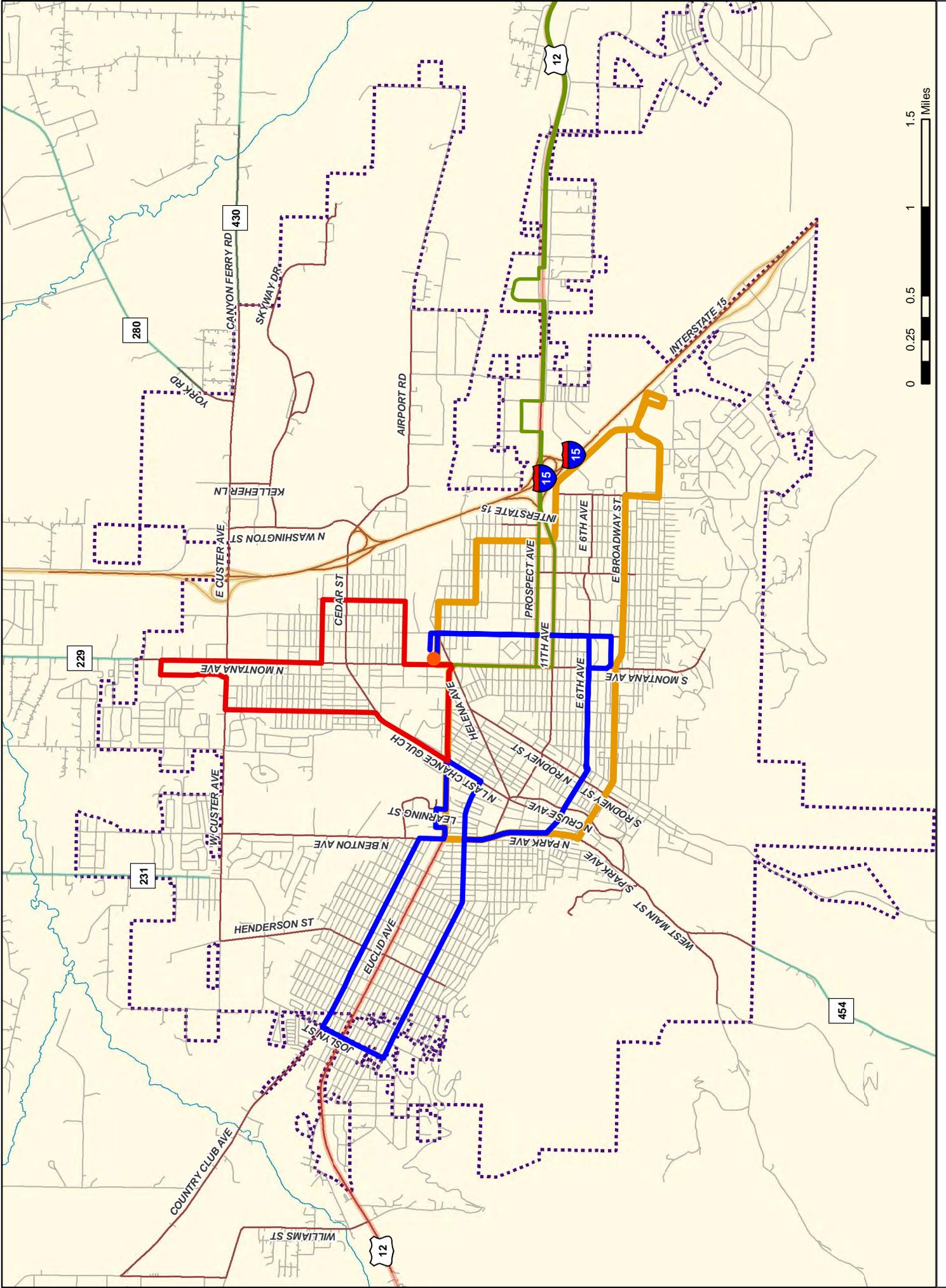


Figure 11-1: Proposed Routes Option A

Table 11-2: Option A Service Changes - Rough Timetable for Select Stops

Route	Direction	Stop	Miles	Accum Minutes	Bus Rotation		
					Hr 1	Hr 2	Hr 3
Town to Market							
Northside		Transit Center	0.0	0:00	1	1	1
	Outbound	Target	2.6	0:10	1	1	1
	Inbound	Transit Center	2.6	0:20	1	1	1
Southside	Outbound	Carroll College	0.8	0:24	1	1	1
	Outbound	Downtown	0.8	0:27	1	1	1
	Outbound	St. Peters	2.6	0:37	1	1	1
	Inbound	Downtown	2.3	0:46	1	1	1
	Inbound	Carroll College	0.8	0:50	1	1	1
	Inbound	Transit Center	0.8	0:53	1	1	1
Town to Market Subtotal			13.3				
East Helena Flex							
East Helena Flex		Transit Center	0.0	0:00	2	3	2
	Outbound	11th & Oakes			2	3	2
	Outbound	Wal-Mart (West Entrance)			2	3	2
	Outbound	Helena Pre-Release Center			2	3	2
	Outbound	East Helena City Hall	7.5	0:29	2	3	2
	Inbound	East Helena Library			2	3	2
	Inbound	Helena Pre-Release Center			2	3	2
	Inbound	Wal-Mart (West Entrance)			2	3	2
	Inbound	Prospect & Oakes			2	3	2
	Inbound	Transit Center	7.3	0:59	2	3	2
East Helena Subtotal			14.8				
Westside-Capital							
Westside		Transit Center	0.0	0:00	3	2	3
	Outbound	Capital Complex			3	2	3
	Outbound	Downtown	1.2	0:05	3	2	3
	Outbound	Carroll College			3	2	3
	Outbound	Euclid & Joslyn	2.6	0:17	3	2	3
	Inbound	Carroll College			3	2	3
	Inbound	Downtown			3	2	3
	Inbound	Capital Complex	3.2	0:32	3	2	3
	Inbound	Transit Center	1.3	0:38	3	2	3
Westside Subtotal			8.3				



Proposed Routes Option B

Table 11-3: Cost Estimates for New Services

Design Parameter	Value
Operating cost per hour (FY 2012)	\$72
Operational Speed (mph)	12
Holidays (no service)	5
Annual weekdays in operation	256
Saturdays	52
Sundays	52
Daily hours in operation	12

Annual Fixed Route Operating Costs

12 hours per day, weekdays	
1 bus	\$221,000
3 buses	\$664,000
4 buses	\$885,000
Saturday	
1 bus	\$45,000
3 buses	\$135,000
4 buses	\$180,000

Additional hour, weekdays

1 bus	\$18,000
3 buses	\$55,000
4 buses	\$74,000

Data discrepancies due to rounding

Action 1.2: Update fare structure to direct curb-to-curb towards people who need it.

Implement fare structure that provides ADA required paratransit service and encourages those who are not eligible under ADA rules to use the more cost-effective, more convenient, and expanded fixed route service.

HATS fare structure has not been updated for at least 10 years. Yearly farebox revenues average around \$72,000 and account for approximately 7% of HATS annual funding.

Any changes to the fare structure should be reviewed with the public, partner agencies and Montana Department of Transportation before they are implemented.

- Rate structure is designed to encourage use of fixed route.
- The base price of \$1 for an adult fare can be adjusted.
- FTA requires ADA paratransit service (curb-to-curb) within $\frac{3}{4}$ mile of fixed route service for people with disabilities who cannot access fixed route. This covers most of the City of Helena and most of East Helena. For the sake of simplicity, we recommend extending the ADA service boundary to cover the entire Helena and East Helena city limits.

- Riders who are eligible for curb to curb service under ADA pay twice the adult fixed route fare, consistent with ADA guidance.
- Consistent with ADA rules, premium curb-to-curb service is available for those who live beyond ¼ mile of a fixed route, and for people who could use fixed route but want curb-to-curb service.
- Compared to the current fare structure, this structure opens opportunities to increase payment from several federally funded human service programs that limit payment to the cost of a fare.

Table 11-4: Proposed Rate Structure

	Fixed Route			Curb to Curb	
	Adult <i>multiplier</i>	Student	Senior/ disabled	ADA Eligible	Premium
	1	0.85	0.85	2	4
Zone A: In-town					
One ride (w/ transfer)	\$1.00	\$0.85	\$0.85	\$2.00	\$4.00
15 rides-10% savings	\$13.50	\$11.00	\$11.00	\$27.00	\$54.00
Unlimited monthly pass	\$32.00	\$27.00	\$27.00	\$64.00	\$128.00
Zone B: East Helena city limits					
One ride (w/ transfer)	\$1.50	\$1.30	\$1.30	\$3.00	\$6.00
15 rides-10% savings	\$20.00	\$17.00	\$17.00	\$40.00	\$80.00
Unlimited monthly pass	\$32.00	\$27.00	\$27.00	\$64.00	\$128.00
Zone C: East Valley					
One ride (w/ transfer)	\$1.75	\$1.50	\$1.50	\$3.50	\$7.00
15 rides-10% savings	\$24.00	\$20.00	\$20.00	\$48.00	\$96.00
Unlimited monthly pass	\$56.00	\$48.00	\$48.00	\$112.00	\$224.00
Fort Harrison					
One ride (w/ transfer)					\$3.00
15 rides-10% savings					\$40.00
Unlimited monthly pass					\$64.00

Children 6 and under ride free. Rates could be adjusted higher or lower depending on policy decision, with multipliers remaining the same to differentiate services.

Action 1.3: Restrict East Valley (north of East Helena) curb to curb service to align with demand, density, and funding sources.

Work with partners including Westmont and Lewis and Clark County to operate a valley service route 4 or more hours per day with no City of Helena money. The cost of transportation associated with the group home at Farm and the Dell and other low income housing in the valley has unduly been shifted to HATS and the City of Helena.

Action 1.4: Expand fixed route and ADA paratransit to 12 hours per weekday.

Work with partners such as the correctional facility, St. Peter’s Hospital, Carroll College, the governor’s office, the downtown Business District, the City of East Helena, and Lewis and Clark

County to establish local funding for 7 extra vehicle-hours per day (approximately \$511 per day, \$126,000 per year). These hours will better accommodate transportation to and from work. If Action 1.1 is implemented with 3 routes, the fixed-route costs are included in those estimates and additional funding would cover demand response.

Objective 2: Improve infrastructure

Action 2.1: Move bus stops out of parking lots and onto roads whenever possible.

Buses belong on roads, not in parking lots. Adjust fixed routes to reduce travel through parking lots and other dangerous areas, and to eliminate the need for buses to reverse as recommended in Appendix D.

Action 2.2: Establish designated stops with bus stop signs

Coordinate with the City's Public Works Department to install bus stop signs. Purchase schedule holders and install schedules designed for display at stops.

Action 2.3: Begin addressing issues with bus stop infrastructure and facilities to better serve riders.

Develop a five-year plan for improving bus stop infrastructure such as shelters and ADA access. This planning process should also identify areas on busy roads where parking should be prohibited and/or where pullouts could be constructed to accommodate bus stops. Work more closely with local governments and MDT on complete street policies that incorporate bus pullouts, hard surface paths between the street and the sidewalk, benches, and shelters as part of construction projects along fixed route corridors (Prospect, 11th, Euclid, Lyndale, Montana, Last Chance Gulch, Highway 287/12, and others as indicated on the proposed service map).

Work with community planning and engineering to establish policies, procedures and design standards for bus stop infrastructure¹. Support adoption of these standards by the city. Work with developers and the city to incorporate transit and transit infrastructure into new development proposals.

¹ Sample stop infrastructure plans are available from Current Transportation upon request.)



Figure 11-3: N. Montana Ave. and many other commercial corridors are currently designed to accommodate bus stops within the lane of travel. (image source: Google Streetview)

Objective 3: Implement Fleet Upgrades and Improved Maintenance Supervision

Action 3.1: Improve maintenance documentation and procedures

Develop a Maintenance Plan and improve documentation as recommended in Appendix D.

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.

HATS should initiate discussions with RMDC, the pre-release center, and the disability organizations to explore the potential for contract for services with HATS to provide transportation services for their clients.

Objective 5: Expand funding & partnerships to provide effective commuter service.

Based upon stakeholder eagerness to be interviewed, key responses to the questionnaire, depth and breadth of the discussions, event participation and positive feedback, we believe there is the potential to build a solid level of support for improving HATS service and funding. During the interviews, no one shared strong resistance or pessimistic views for the chances of success for HATS to improve and/or expand existing services. This gives HATS an opportunity for continued engagement and support from community leaders. Our recommendations:

Action 5.1: Engage stakeholders in TDP implementation

While stakeholders have generally positive feelings about HATS, there is a lack of deep understanding about the system and how it is funded, at this point. This provides more opportunities to communicate about HATS, build strong relationships and engage stakeholders

in TDP implementation activities over the next five years and beyond. Recommended activities that will help foster continued stakeholder engagement in HATS include:

- Continue to identify and outreach key community stakeholders including a representative from the Veteran Administration, First Student, American Association of Retired Persons, State Fund and the mental health community.
- Organize a stakeholder TDP briefing “event” as a kick off to the public comment period, if possible, but certainly prior to the final commission vote.
- Engage stakeholders in TDP final approval including communicating to list about hearing process, public comment opportunity and final hearing comment opportunity.
- Organize constituency group-based work sessions to assist with TDP Implementation activities (i.e. funding, improvement of existing route(s), development of new route(s)).
- Organize yearly TDP progress update “events” as an opportunity to continue to educate and engage the broader community in HATS.
- Review, evaluate and update the HATS Transit Advisory Committee Goals, Objectives, activities and expand membership where appropriate.
- Identify and regularly participate in key group meetings (i.e. Non Motorized Transportation Advisory Committee, Chamber of Commerce Transportation Committee, Board of Health, Hometown Helena), giving updates on HATS.

Action 5.2: Consider developing a communications plan

Maintain and continue to build relationships with general community, stakeholder group representatives, elected officials and the media. Consider training staff on strategies and tools for communication success.

Action 5.3: Pursue ideas for additional revenue

Stakeholders’ top suggestions for raising additional revenue for improving HATS service included:

- pursuing partnerships agreements with private sector entities;
- soliciting Lewis and Clark County for more funding;
- soliciting the Montana Department of Transportation for more funding;
- creating an urban transportation district/mill levy increase, to fund transportation related projects including, transit, sidewalk repair and completion, ADA requirements, repairing unsafe intersections, road and bridge repair, transit, sidewalks, etc.;
- financial partnership with “anchor” businesses and entities;
- yearly contributions from key users;
- local option gas tax to fund transportation related projects including, transit; sidewalk repair and completion, ADA requirements, repairing unsafe intersections, road and bridge repair, transit, sidewalks, etc.;
- meters at capital complex to fund transit;
- increasing the fare;

- a transportation impact fee to generate revenue for transit capital expenses; and,
- better coordination with and/or utilization of various social service agency transportation related funds.

After the City Commission has accepted this report, HATS will evaluate the ability to undertake each or these items.

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

Currently staff uses more than 30 Excel spreadsheets to track ridership and financial data for Checkpoint, Curb-to-curb, East Valley, Trolley to Trails, Youth Connection, RMDC, and Head Start. An integrated plan for data management (described in Action 5.2) will require analysis, decision making, and time for implementation. In the interim, many of the spreadsheets can be modified and consolidated to eliminate duplicative data entry. The team had to make some of these spreadsheet changes to effectively analyze system performance, and we are willing to share those spreadsheets.

Additionally we recommend changing from daily data entry of boardings by stop, to sampled data entry. One week per month should suffice to understand patterns by time of day and by location.

Action 6.2: Develop an Intelligent Transportation Systems (ITS) plan following a systems engineering process

Public transportation is a data-intense business; we recommend going through an organized effort to consider the different users of information, the different ways data will be used, and the different systems that need to be interfaced with. This is also required (but not rigorously enforced) under FTA guidance. Technology and data processing should support the following needs.

- Support for good decision making on a day-to-day bases for curb-to-curb
- Analysis of ridership and financial data for assessing performance
- Provide information to customers such as schedules, routes, automated trip planning, and real-time tracking
- Tied to City of Helena accounting
- Required reporting to MDT
- Must intake data from coordinated partners, RMDC and Head Start

This does not need to be overly complicated, HATS simply should go through the process of thinking through the needs.

Options vary, including better organized Excel spreadsheets or updating MS Access or web-based data entry that other communities have used. The appropriate solution should be based on the ITS plan.

Action 6.3: Implement General Transit Feed Specification (GTFS)

GTFS has become the industry standard data structure for describing fixed route bus service. We recommend following GTFS data structure in improving database design described in Action 5.2. Sending the data to Google and embedding a trip planner in a web page requires minimal effort after that. While many technology decisions should wait until the completion of a needs analysis, we know from experience that GTFS will be the backbone for describing fixed route services.

Action 6.4: Purchase and implement demand response management software

While many technology decisions should wait until the completion of a needs analysis, we know from experience that demand response software will greatly ease the current way of doing business and improve customer service. The leading companies modularize functions, allowing added capabilities if determined important in the planning process.

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

Create a new website, separate from the city website, that meets standards of peer communities (such as Butte), addresses the information needs expressed by the public | Chapter 7. Improvements should include Google's transit trip planner and adding Google Translator to the website for use by non-English speakers and as required in updated FTA civil rights guidance. Trip planning requires that fi

A new website should include a content management system, such as Word Press, that makes it easy for HATS staff to quickly update information. Current Transportation recommends working with someone who has experience with transit web sites, GTFS, and small transit systems. HATS can investigate the Rural Transit Assistance Program's website service. The website is free but staff time and expertise is required to properly set up the site.

Action 7.2: Improve and update maps and schedules

Improve maps and schedules. Incorporate improved maps and schedules into brochures, signs, and the website to minimize riders' confusion. Design online timetables in a manner that facilitates interpretation by assistive reading tools used by people with low vision.

Action 7.3 Create a brochure

According to our community survey (figure 9-25), a good brochure is the most important communications tool for current riders and was second only to the HATS website for people who are currently not riding. HATS 2007 TDP recommended creation of a brochure, but HATS

still lacks this fundamental transit communications tool. A brochure should attractively designed and should include one or more maps showing fixed route services, easy to read schedules, and a riders' guide explaining how to use the service.

As suggested in the 2007 TDP, the launch of a brochure could be accompanied by creating posters and signs which could be displayed in businesses, human service agencies, places of employment, hospitals, and community bulletin boards. The signs or posters should provide a brief description of the service with a source to obtain additional information. If possible, the schedule brochures should be made available where the posters are displayed.

Objective 8: Continue to improve management and staffing

Action 8.1: Improve management of curb-to-curb through policy changes and up-to-date tools

Implement staffing, no-show policy and service boundary recommendations in Appendix D.

Action 8.2: Improve training and procedures as recommended in Maintenance & Operations Review

As recommended in the Operations and Management section of (busman appendix), an Operations Management Plan should be developed and improved procedures implemented including better service supervision, cash handling, data collection and safety training.

11.4 Five-Year Actions

The following long-range recommendations include actions that address less immediate needs than the one-year actions or require more planning and resources than would be feasible in one year. Many of the five-year actions build upon actions initiated in Year One. Implementing the five-year actions will ensure that HATS responds to growing demand, remains on firm financial footing, works effectively with its partners, and captures anticipated opportunities.

Many of the options presented here are possible only with success in increasing non-federal funds.

Objective 1: Implement service changes

The following service changes can only be accomplished with additional funding. While Year 1 actions improve the ratio of fixed route miles to curb-to-curb miles, changes in Years 2-5 build upon the Year 1 fixed route foundation by expanding hours or frequency depending on budget and community priorities.

Action 1.5: Implement 2-5 year service improvements to the extent funding allows

- 1. Implement Saturday service for at least one bus, 10 hours per day.**
- 2. Implement 30-minute peak hour frequency** to all fixed and flex routes, morning and evening.
- 3. Establish a commuter route to the north valley.**
- 4. Establish commuter service to Montana City or coordinate carpools and vanpools.**
- 5. Work with Rimrock and aging services to find options for Townsend residents to travel to Helena.**
- 6. Experiment with longer hours, additional Saturday service, day-long 30-minute frequency, and Sunday service.** Riders widely express interest in expanded hours and more days of service, and off hour service can be vital for people with limited transportation options for travel to work and

other purposes. However, cost per ride on weekends and after 7pm tends to be high because the number of riders is much lower (50-70% of daytime use). During these off hours, alternatives to fixed route can be a cost effective solution, including general public demand response, taxi vouchers, and car share programs.

7. **Support arrangements for an affordable airport shuttle.** In lieu of providing fixed route bus service, the downtown business association, tourism interests, and the economic development community may wish to pursue an arrangement with a private shuttle company or taxi service to offer guaranteed minimum financial support in exchange for an airport shuttle with low cost to . The agreements for new air service and the FTA 5311(f) intercity bus program are two possible models for this type of public-private partnership.

Costs for combinations of these items can be estimated from values in Table 11-3.

Objective 2: Improve infrastructure

Curb-to-curb should become a complementary ADA paratransit service with eligibility criteria

Action 2.4: Establish designated stops with signage, ADA access, benches, shelters and schedules.

Work with the Helena Planning and Public Works Departments to design and install bus stop infrastructure and amenities at identified locations. Establishing fixed bus stops should significantly improve on-time service and make fixed route service easier for the public to use.

The lack of benches and shelters was a problem frequently cited by riders. Riders and stakeholders raised the issue that without fixed stops it is hard to plan trips because they don't necessarily know where to wait for the bus.

Action 2.5: Parking management

Participate in planning related to parking management.

Action 2.6: Park & Rides

As Helena continues to grow, park and rides can facilitate commuting via fixed routes and also help achieve the TDM objectives. The City of Helena and Lewis and Clark County, as well as local towns, should discuss future park-and-ride sites. Property should be set aside for the sites using a cooperative effort. Ridesharing with vanpools and carpools would alleviate traffic congestion on the interstate, state highways, and other arterials.

Objective 3: Implement Fleet Upgrades and Improved Maintenance Supervision

Action 3.2: Implement a financially sustainable phased vehicle replacement and fleet expansion plan

A vehicle replacement plan is included in Appendix G.

This replacement plan allows the capital costs to be spread over a period of years so that HATS will not face the impact of a large lump sum expenditure. The replacement schedule should be modified with subsequent purchases to achieve a program where new vehicles are purchased every four years to spread out the expenditures.

If not already in place, HATS should establish a vehicle replacement fund and allocate local contributions on an annual basis to this savings account. This account should be sufficient to provide the local matching funds required to obtain federal grant money to purchase new fleet vehicles when necessary.

Action 3.3: Work with MDT to ensure that HATS operates with vehicles that provide safe, efficient, and quality service

Request greater input into specifications MDT develops for purchase of new equipment. Specifically, work with MDT to avoid equipment that has caused expensive problems; update the appearance of buses; include surveillance equipment; and include better advertising racks as recommended in the Maintenance and Operations Review (Appendix D). Additionally, if HATS purchases buses with ADA ramps we do not recommend the system that was included with some of Streamline's buses where the ramp controls are located on the outside of the bus. This system has generated many driver complaints because it causes delays and because it forces drivers to get out of the bus in all weather conditions including potentially dangerous icy conditions.

Objective 4: Improve coordination with human services providers to minimize duplication of services and improve overall service to transportation disadvantaged populations.

Action 4.2: Continue working with human service providers to implement coordination strategies and contracts to improve and expand efficiency, funding and service quality.

Strengthen mobility management functions, working with human service agencies to coordinate rides for their constituents. Work with jail and human service agencies. See discussion in Section 8.1.

Action 4.3: Expand participation in the TAC to include other organizations in addition to transportation providers and health and human services agencies.

As discussed previously there are many benefits to expanding the TAC membership to include other organizations such as local economic development, planning, the Transportation Coordinating Committee, education, health, and environmental groups. Including these groups on the transportation advisory committee will help diversify the conversation and improve the coordinating efforts beyond providers and social service agencies. As suggested in the 2003 TDP, one of the TAC's goals should be ensuring that transit planning is coordinated with bicycle and pedestrian planning.

Objective 5: Expand funding & partnerships to provide effective commuter service.

Action 5.4: Position HATS to meet growing demand for services and to become more integrated into the community.

Continue working with large employers and the colleges to implement strategies including contracts and contributions to expand funding and provide effective commuter service. Develop

a process for regular communication with the business community to look into needs and opportunities.

Action 5.5: Consider creating an Urban Transportation District (UTD) within the Helena area.

Consider a petition to place an Urban Transportation District (UTD) with millage on the ballot. Alternatively, work local governments to significantly increase contributions.

HATS cannot provide quality transit without additional non-federal investment. Many of the objectives and potential actions identified during this project will require increased funding to implement. Montana Codes Annotated 7-14-201, et seq. authorizes the establishment of urban transportation districts to "...supply transportation services and facilities to district residents and other persons." A UTD is funded by bonds, which are backed by local governments, issued to cover the cost of proposed transportation improvements. Such improvements could be related, for example, to infrastructure or to operating a transit system.

The Montana code gives counties the authority to establish UTD's, given residents within the district vote in favor of the measure. A UTD has the flexibility to cross city and county boundaries. Once a UTD is formed, the method of collecting revenue is through a tax levied upon all property.

Among existing UTD's are Missoula, Big Sky, and Dawson County (Glendive). Bozeman has made some efforts towards forming a UTD.

Work with the county and a qualified campaign strategist to prepare for and run a signature gathering campaign and ballot measure. Raise funds from private sources to operate a successful campaign.

Objective 6: Strategically implement data management and technology to improve management capabilities as well as service to customers.

Action 6.5: Implement the data management and ITS plan

Deploy technology as determined in Action 5.2. We expect this will include real-time vehicle information. We also know that this is a rapidly changing environment. Use of mobile devices will only increase, and customer expectations will be for increased automation, including fares.

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.

Most of the following actions should be coordinated to be completed in parallel with service improvements. As noted in the Appendix D, "The Checkpoint service currently cannot be marketed to choice riders." As these service improvements are made over the next five years, HATS should expand marketing to increase public awareness of the services. In choosing strategies and tactics, the consultant team believes it is important to focus on those with a

proven track record elsewhere, and those that are indicated based on survey responses and other feedback from the public and stakeholders.

Action 7.4: Continue to improve website

- Update GTFS, maps, and schedules with new services.
- Add real time tracking feature once this technology is implemented.
- Add mobile interface once real time tracking is implemented.
- Implement other improvements recommended in Chapter 9.

Action 7.5: Take advantage of opportunities for free media coverage and other free publicity

As recommended in the 2007 TDP, HATS should take advantage of all opportunities to get free news coverage from local print and electronic media. Opportunities include any changes or improvements to the service such as improved routes or installation of new shelters and benches, as well as human interest stories that could be developed with human service partners on the TAC.

Additionally, as recommended in the 2007 TDP, HATS could gain important, targeted free publicity by setting an objective of making several presentations every year to audiences including civic organizations, senior citizens groups, human services organizations and the two colleges. Service performance reports should be presented at least annual at the city and county commissions' regularly scheduled public meetings. A standard PowerPoint presentation could be developed which could be used for all events, and modified as necessary for specific audiences.

Action 7.6: Develop a marketing plan with a dedicated budget

Current Transportation recommends working with an experienced and successful local marketing firm to develop a comprehensive, ongoing branding and promotional campaign. For successful implementation, we recommend budgeting an ongoing investment equal to a relatively small percentage of operating expenses, with a substantial initial one-time investment several times higher to develop and launch the campaign. As noted in the 2007 TDP, according to the American Public Transit Association, transit providers typically budget between 0.75 and 3.0 percent of their gross budget on marketing promotions (excluding salaries). Although this is less than most private sector businesses, public sector organizations can rely more heavily on free media support for their public relations programs. Following this recommendation would put HATS marketing budget roughly in line with Bozeman's budget. It is important to note that an effective marketing plan would include a variety of no-cost and low-cost strategies such as taking advantage of opportunities for local media coverage. The 2007 TDP included a detailed marketing plan with many good ideas.

A marketing budget should, at a minimum, allow for the cost of developing a marketing plan, designing and printing marketing materials (most importantly a brochure with maps and schedules), and implementing core marketing plan elements such as a new website.

Objective 8: Continue to improve management and staffing

Action 8.3: Practice sound and sustainable financial management

- **Facilities Investments** – Develop priorities and a schedule for investments in facilities (Bus depot, bus stops, shelters, etc.) Including these improvements in HATS’ long-term budget will allow funding sources to be identified and projects to be scheduled when appropriate.
- **Operational Costs** – Review and manage operational costs such as staff, fuel, etc. by monitoring performance measures and trends in expenses. Management should present expenses and performance measures on a quarterly basis in compliance with good oversight practices.
- **FTA Funding** – Maintain compliance with federal programs and compete effectively for 5311 and other available program dollars. For grantees to remain eligible for federal funding from FTA’s 5311 program and other similar assistance programs that HATS currently participates in, grantees are required to meet specific conditions and promote good management practices. Montana Department of Transportation periodically conducts reviews to ensure recipients are meeting the required standards. The review procedures for Montana recipients are described in detail at http://www.mdt.mt.gov/publications/docs/forms/transit/5311_review.pdf. HATS should review this document and make modifications to operations as necessary to maintain compliance for federal programs.

Action 8.4: Provide customer service that produces highly satisfied riders and respects the needs of people with disabilities.

Comments from the onboard surveys and public workshops indicated there may be a need for additional training to assist drivers and other staff in working more effectively with riders with disabilities. HATS can be provided with the Easter Seals Project ACTION program and this should be reviewed annually to ensure drivers are familiar with ADA requirements.

Action 8.5: Continually monitor rider satisfaction and HATS performance, make modifications where necessary.

HATS should periodically conduct surveys of the community and riders to evaluate how Helena area residents perceive the system. Additionally, compliments and complaints received by HATS should be tracked to determine areas where the system is performing well and those that can be improved upon.

12 Bibliography

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Appendix A: Exiting Bus Schedules

HELENA TRANSIT CURB TO CURB BUS

This is a curb-to-curb bus service. We will pick you up at your curb and deliver you within the City of Helena service area. All transit buses are equipped with ADA specified wheel chair lifts. We kindly request to be advised if you need the lift. Next day notice is necessary to provide efficiency and coordination in scheduling rides. The dispatcher will schedule you on the first available bus. All rides not scheduled in advance will be subject to availability of seating. We accept cancellations by calling our office and leaving a message. We do provide an answering machine for after hours cancellations.

Operating Hours:

Monday through Friday 6:30 AM to 5:00 PM

*** No buses are available on state and federal holidays

HELENA TRANSIT CHECK POINT BUS

This is a designated route bus service. We have 19 timed bus stops located in high demand areas for your convenience. No call in is required for this service. Refer to the Checkpoint bus stop list and be at one of the 19 stops for a bus pick up at the time.

This bus cannot be re-routed and no deviation's are allowed.

Please be aware of the 10-minute window time at all bus stop locations.

Operating Hours:

Monday through Friday 7:00 AM to 6:00 PM

*** No buses are available on state and federal holidays

FARES Per one-way trip CURB TO CURB SERVICE:

Children 6 and under ride free.
\$0.85 for anyone aged 55 and older or anyone with physical or mental disabilities.
\$1.50 full fare, or \$1.00 if your pick up or drop off is a checkpoint bus stop.

CHECK POINT SERVICE: \$0.85 for all riders.

TOKENS and PASSES

Tokens and passes can be purchased from any driver or at the Transit office.

NOTE: Drivers do not carry change!! Please have the correct change when boarding the bus or purchasing tokens or passes. Please make checks payable to Helena Area Transit Service.

TOKENS 10 tokens in a roll

Red tokens (\$0.85 each) \$ 8.00
Green tokens (\$1.00 each) \$ 9.50
Blue tokens (\$1.50 each) \$14.25

PASSES 21 rides per pass

Red bus passes \$16.00
Green bus passes \$19.00
Blue bus passes \$28.50

RIDER RESPONSIBILITIES

We please request:

1. No smoking, eating, profanity, or drinking on bus
2. Carry-on is limited to what you can bring on in one armload.
3. Remain seated until the bus comes to a complete stop.
4. Baby strollers must not be occupied.
5. No bicycles or oversized packages allowed.
6. Service animals must be restrained at all times. Other pets must be in a pet carrier.
7. Articles left on the bus must be claimed within 30 days.
8. Drivers have the right to refuse service to disorderly passengers.

HELENA AREA TRANSIT SERVICE

447-1580

1415 N. MONTANA AVE



HATS attempts to provide accommodations for any known disability that may interfere with a person using our service. Alternative accessible formats for this information will be provided upon request. For further information, call (406) 444-6331 or TTY (800) 335-7592, or by calling Montana Relay at 711.

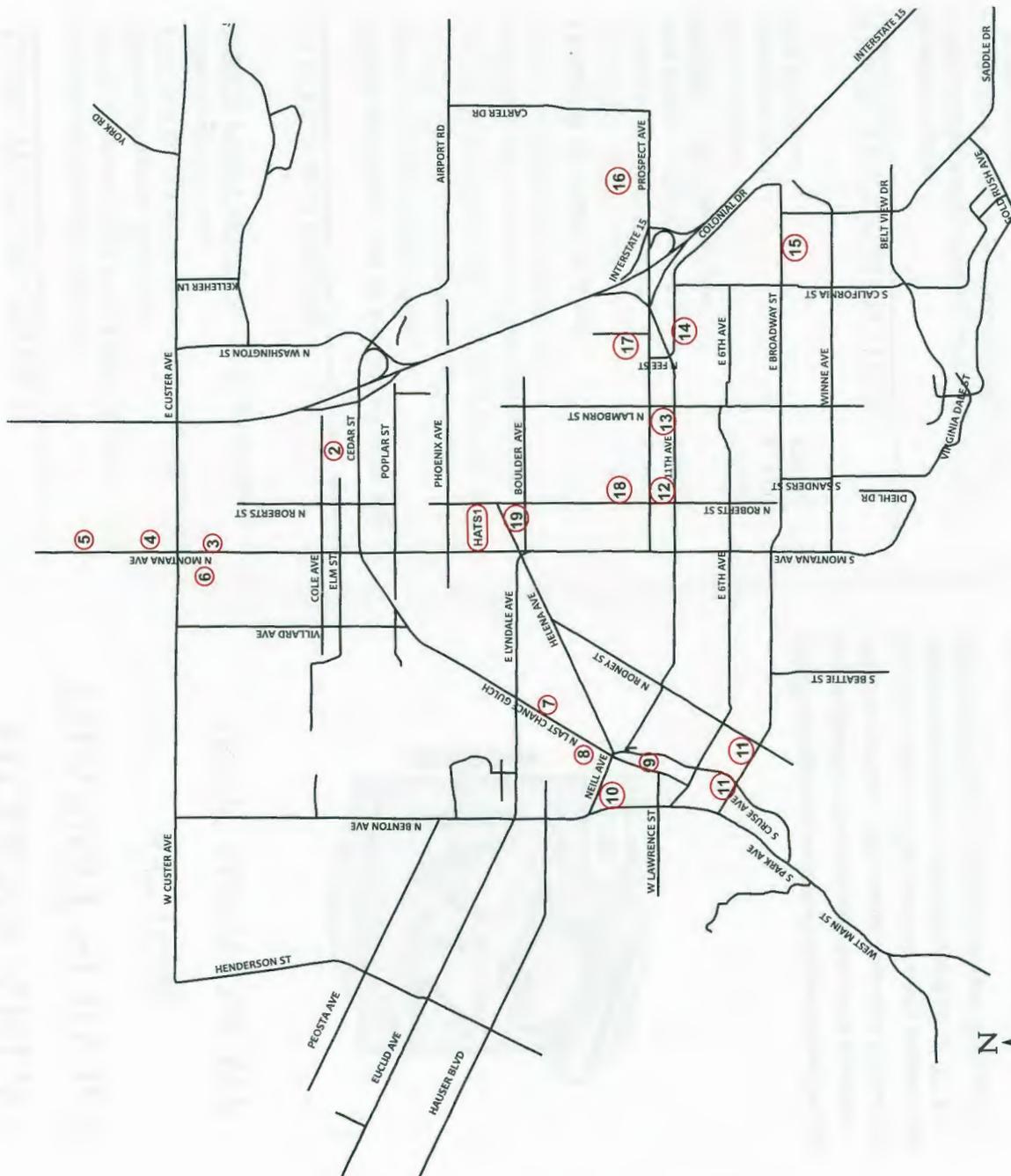
ACCESSIBLE BUSES FOR THE DISABLED: ADA SPECIFIED WHEELCHAIR LIFTS. DRIVER WILL LOAD AND UNLOAD FROM THE CURB.

RIDERS, PLEASE PROVIDE YOUR OWN ESCORT TO AND FROM BUS, IF REQUIRED.

CHECKPOINT STOPS
BUS STOP **HOURLY STOP**

7:00 A.M. TO 6:00 P.M.

- 01 HATS OFFICE N. Montana** **00:00**
- 02 K-Mart** **00:02**
- 03 Good Samaritan** **00:05**
- 04 Shop-Ko/Albertsons N.** **00:08**
- 05 Target** **00:11**
- 06 Murdoch's Store** **00:13**
- 07 Golden Triangle** **00:20**
- 08 Main St. & 13th St.** **00:22**
- 09 Guardian (Sunset Capital Apts.)** **00:24**
- 10 Fuller & Placer** **00:26**
- 11 Base Camp/B&B Market** **00:28**
- 12 Safeway** **00:32**
- 13 Capital Hill Mall** **00:34**
- 14 City/Co. Health Dept.** **00:36**
- 15 St. Peter's Hospital** **00:40**
- 16 Wal-Mart Gen. Merchandise Dr.** **00:47**
- 17 Eagles Manor** **00:52**
- 18 Ramey Park** **00:54**
- 19 Helena Industries** **00:56**



EAST VALLEY BUS SERVICE [.85 TO \$1.50] CALL 447-1580

Featuring bus service to and from:
EAST VALLEY, EAST HELENA, WAL-MART, ST. PETER'S HOSPITAL CAPITAL HILL MALL & DOWNTOWN HELENA

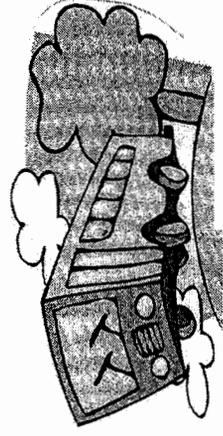
Hours: Monday - Friday 7am-11 am & 1pm-5pm * Effective 05/31/2011

HOW IT WORKS....

- Call 447-1580 to schedule a ride, the bus will pick you up at the door. Please be ready for pick up.
- Please call for next day service for all 7am rides.
- If your destination is not listed on our route, you may transfer to the Helena Bus (H.A.T.S.) to take you to your stop. See H.A.T.S. checkpoint schedule.
- The H.A.T.S. fare is an additional charge of minimum 85 cents, maximum \$1.50. If you require the H.A.T.S. bus please contact 447-1580 with advanced notice of your transfer. There may be some wait time for transfers. See H.A.T.S. checkpoint schedule.
- All stops other than E.H. Library, Pre-Release Center, Wal-Mart - General Merchandise door and Capital Hill Mall are call in areas.

East Valley Schedule HOURLY 7AM - 11AM / 1PM-5PM H.A.T.S Checkpoint Schedule HOURLY 7 AM - 6 PM

HOURLY 7AM - 11AM / 1PM-5PM		HOURLY 7 AM - 6 PM	
HATS OFFICE N. MT	7:00 (call in)	HATS OFFICE North MT	7:00
900 North Jackson	7:02 (call in)	K-Mart	7:02
Public Assistance Office	7:05 (call in)	Good Samaritan	7:05
East Valley & Leisure Village	7:10 (call in)	Shop-Ko/Albertsons N	7:08
East Gate	7:25 (call in)	Target	7:11
East Helena	7:30 (call in)	Murdoch's Ranch/Home	7:13
East Helena Library	7:31	Golden Triangle	7:20
Pre Release Center	7:33	Main St & 13 th St	7:22
Wal-mart - West G.M. door	7:35	Guardian (Old Sunset Capt)	7:24
City County Health Dept	7:45 (call in)	Fuller & Placer	7:26
St Peters Hospital	7:50 (call in)	Basecamp/B & B Market	7:28
Capital Hill Mall	7:50	Safeway	7:32
HATS Office N. MT	8:00 (call in)	Capital Hill Mall	7:34
		City County Health Dept	7:36
		St Peters Hospital	7:40
		Wal-Mart-West GM door	7:47
		Eagles Manor	7:52
		Ramey Park	7:54
		Helena Industries	7:56



The East Valley Bus can vary no more than two blocks off the set route in Helena in order to keep consistency.

JUNE 11 — TO — AUG 10

YOUTH AGES 8-18

Under 8 must be accompanied by a responsible caregiver.

Adults with a child ride free.

FREE SUMMER YOUTH TROLLEY

REC-Connect
with Helena's
Spot
Your
Trolley

Times

Stop Location (look for the FYS sign)

Points of Interest

Times	Stop Location (look for the FYS sign)	Points of Interest
1 North Loop - Valley 9:20 am	HATS 1415 N. Montana Avenue	
2 9:30 am	Jim Darcy School – 990 Lincoln Road West Front of the school next to the flag pole	Pick-up site
3 9:40 am	Rossiter School – 1497 Sierra Road East Underneath the Rossiter School sign	Pick-up site
4 City Loop- East 10:00 am 12:00 pm	Treasure State Acres Park Kodiak Road HATS 1415 N. Montana Avenue	Pick-up site Pick-up, Lincoln Park, Kay's Kids program
5 10:03 am 12:03 pm	Lincoln Park – North Roberts At the bus stop	Pick-up, Kay's Kids Program
6 10:15 am 12:15 pm	Kathleen Ramey (Sharon Park) – N Roberts next to the gate	Pick-up site
7 10:25 am 12:25 pm	Smith School - 2320 Fifth Avenue Front of school by the sign	Pick-up site
8 10:30 am 12:30 pm	Lockey Park – Broadway by the tennis courts	Pick-up site
9 10:40 am 12:40 pm	Last Chance Splash/ YMCA – N Last Chance Gulch. Northwest corner by the pool.	Memorial Park, YMCA, Pool, Kay's Kid's program, Feed-n-Fun program, Kindrick Legion Field
10 10:45 am 12:45 pm	Great Northern Bus stop – W 14 th Street by the Silver Star Restaurant. At the bus stop.	X-Works, Cinemark, Carousel, Civic Center, tennis courts/lessons, parks
11 10:50 am 12:50 pm	Fuller & Placer Street at bus stop	Holter Museum, Grandstreet, LC Gulch, parks, businesses
12 10:55 am 12:55 pm	Main Street & Broadway (Women's Mural) Next to the bench	Library, southern end of walking mall, Parks
13 11:00 am 1:00 pm	Mt. Helena Trailhead (Reeder's Village Road) By the turn off to the Mt. Helena parking	Mt. Helena trails
13 City Loop-West 11 am 1 pm	Mt. Helena Trailhead (Reeder's Village Road) By the turn off to the Mt. Helena parking	Mt. Helena trails
14 11:10 am 1:10 pm	Cunningham Park – Flowerree & Henderson West end of park	Pick-up site
15 11:20 am 1:20 pm	Salvation Army – 1330 Hudson St. In front of the building	Broadwater Circle, Waukesha Park, Barney Parks (tennis courts, Kay's Kids)
16 11:25 am 1:25 pm	Northgate Park – Benton & Barney Northeast corner of park	Pickup site
17 11:30 am 1:30 pm	Skelton Park – Roadrunner & Sandpiper Loop Northeast corner of park	Pickup site
9 11:35 am 1:35 pm	Last Chance Splash/ YMCA – N Last Chance Gulch. Northeast corner by the pool.	Memorial Park, YMCA, Pool, Kay's Kid's program, Feed-n-Fun program, Kindrick Legion Field
10 11:40 am 1:40 pm	Great Northern Bus stop – W 14th Street by the Silver Star Restaurant. At the bus stop.	X-Works, Cinemark, Carousel, Civic Center, tennis courts/lessons, parks
11 11:45 am 1:45 pm	Fuller & Placer Street at the bus stop	Holter Museum, Grandstreet, parks, walking mall
12 11:50 am 1:50 pm	Main Street & Broadway (Women's Mural). Next to the bench.	Library, southern end of walking mall, Parks
4 12:00 2:00 pm	HATS 1415 N. Montana Avenue start City Loop-EAST again	Pick-up, Lincoln Park (Kay's Kids program)



Youth Connectio
Great Kids Make Great Communities

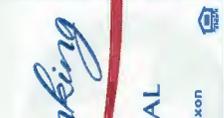
Made possible by a partnership
the City of Helena, Lewis & Clark
HATS, Helena Parks and Recreation
and Youth Connections

FREE!

**HOP ON
THIS
SUMMER!**



MAP AND DETAILS 324-1032 or www.youthconnectionscoalition.org/trolley



hike at



SOL
cheduled.
gent Care.
it's not an
ctor now.

nic
irmigan Ln.
Wards

stpetes.org

oadway
1
, MT
11



MOSAIC
ARCHITECTURE - PLANNING - DESIGN
428 N. Last Chance Gulch
(406) 449-2013

Looking for a fun place to go?
Journey to Where the Sky Ends... and Space Begins...
Exploration Works!
See an actual next generation "Bio Suit" designed for exploring Mars. Search for real black holes through space warps and time twists. Fun for the whole family exploring space, flight and more!
995 Centennial Way • 406-439-1800
www.explorationworks.org

Check out the great TEEN programs @ Your Lewis & Clark Library!
the NIGHT

44 S. PARK AVE
HELENA, MT 59601
(406) 449-8424

Proud to support Trolley to Trails.
Valley Bank OF HELENA
Glacier Bancorp Family
406-495-2400 | www.valleybankhelena.com
Member FDIC Equal Housing Lender

BaseCamp
Gear for the Great Outdoors
Helena • Billings

FREE Trolley ride every Saturday and Sunday (rain or shine)!

Thank you to our Downtown Helena Business sponsors:

- Allegra Marketing, Print & Web
- American Federal Savings Bank
- Big Sky Cyclery • Birds & Beasleys
- Blackfoot River Brewing • Exploration Works • Great Divide Cyclery • Great Northern Car Wash • Helena Credit Union • Hub Coffee • Lewis & Clark Library • Mediterranean Grill • Mosaic Architecture • Park Avenue Bakery
- Real Food Market & Deli • sole sisters
- St. Peter's Hospital • Taco del Sol
- The Base Camp • Windbag Saloon & Grill • Tread Lightly • Trimac Group
- Urgent Care Plus • Valley Bank

Trolley departs from Women's Mural (Broadway and the Walking Mall) at **8:00, 8:40 & 9:20 a.m.**

The drop-off is .7 miles from the Mount Helena Ridge Trail trailhead in Park City.

A bike rack is available on the trolley.
No pets!

Donations greatly appreciated!
Please call 447-1535 or mail donation to:
Helena Business Improvement District
Trolley to Trails
225 Cruse Ave., Suite B
Helena, MT 59601

www.downtownhelena.com



Trolley to Trails

Every Saturday & Sunday
Catch a FREE Trolley Shuttle to
Mount Helena Ridge Trails
June 2-Sept. 30, 2012



Trolley to Trails is brought to you by the Helena Business Improvement District

Looking for ways to
 save a buck? Want to
 avoid traffic? How
 about adding a little
 exercise to your day?
 Start by walking, biking
 or taking the bus.
 eWalkHelena is here
 to help you give it a try!



"I love riding my bike
 in Helena!" -Jillian



Bike Walk Helena

WALK

fun, get fit, and start
 your day energized while
 enjoying the environment.
 Helena is a bike-friendly
 town where it's as easy to
 ride on your bike as it is to
 drive your SUV. Opportuni-
 ties await with new bike
 trails, a growing on- and
 off-street commuter
 program, and tons of in-
 formation to get you
 walking and rolling.

us at
www.bikewalkhelena.org

WALK

Walking is easy, invigorating,
 non-polluting and free! Benefit
 from the exercise while
 commuting at a pace that
 allows you to experience the
 sights, sounds and smells
 that you would miss in a car.
 If your workplace is too far to
 go by foot, you can still:

- Walk to a bus stop and
 take the HATS bus.
- Walk to lunch, errands,
 and meetings.

BUS

The Helena Area Transit
 Service (HATS) is a conve-
 nient, affordable, and less
 stressful alternative to
 driving. Fares range from
 free to \$1.50. HATS offers
 specialized services to meet
 the needs of all of our
 community residents. Pick
 up a schedule at HATS,
 1415 N. Montana or contact
 HATS at 406-447-8080.

BIKE & RIDE

HATS buses are equipped
 with racks to carry bikes at
 no extra charge.



PLAY IT SAFE

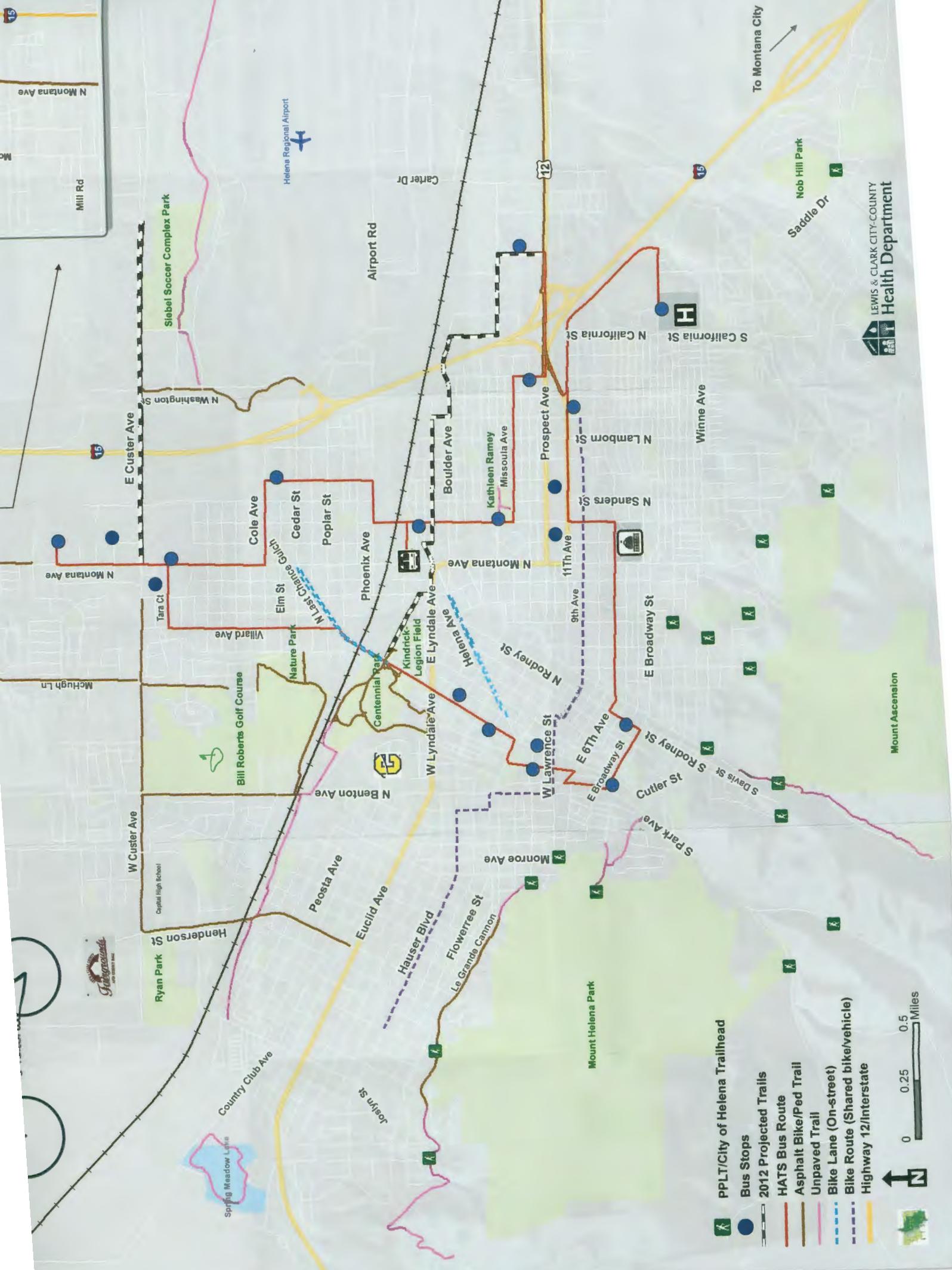
Walkers:

Use sidewalks when
 possible. Otherwise, walk
 facing traffic. Cross streets
 at corners and at marked
 crosswalks. Look both ways
 and keep looking as you
 cross streets. Identify and
 use safe routes.

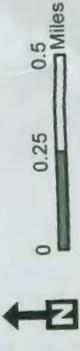
Cyclists:

Follow all traffic signs and
 signals, ride with traffic and
 use hand signals to let
 drivers and others know
 your intentions. Ride predict-
 ably, always wear a helmet
 and be visible with reflective
 clothing and use of lights for
 night riding.

Safety is a responsibility
 shared by all who use our
 streets —drivers, bicyclists
 and pedestrians alike.



- PPLT/City of Helena Trailhead**
- Bus Stops
 - 2012 Projected Trails
 - HATS Bus Route
 - Asphalt Bike/Ped Trail
 - Unpaved Trail
 - Bike Lane (On-street)
 - Bike Lane (Shared bike/vehicle)
 - Highway 12/Interstate



LEWIS & CLARK CITY-COUNTY
Health Department

To Montana City

Nob Hill Park
 Saddle Dr

Mount Ascension

Mill Rd
 N Montana Ave

Siabel Soccer Complex Park

Helena Regional Airport

Airport Rd

Carter Dr

12

H

S California St
 N California St

Winne Ave

N Lamborn St

N Sanders St

Prospect Ave

11Th Ave

9th Ave

E Broadway St

N Rodney St

E 6Th Ave

W Lawrence St

E Broadway St

Cutler St

S Rodney St

S Davis St

S Park Ave

Monroe Ave

Flowerree St

Le Granda Cannon

Hauser Blvd

Euclid Ave

Peosta Ave

N Benton Ave

W Lyndale Ave

W Custer Ave

Henderson St

Capital High School

Ryan Park

Spring Meadow Lake

Country Club Ave

Jeffers St

Willard Ave

N Last Chance Gulch

Elm St

Tara Ct

N Montana Ave

E Custer Ave

N Washington St

Phoenix Ave

Kindrick Legion Field

Nature Park

Bill Roberts Golf Course

Centennial Way

Helena Ave

Boulder Ave

Kathleen Ramey

Missoula Ave

Appendix B: Stakeholders Interview Notes



405 SOUTH FIRST ST. WEST
PO BOX 5800
MISSOULA, MT 59801
phone: 406.549.2848
fax: 406.721.8535

STRATEGIC SERVICES
www.mrss.com

Memo

To: Lisa Ballard, Current Transportation Solutions
From: Elizabeth Andrews – M+R Strategic Services
Date: March 3, 2013
Re: Helena Area Transit Service (HATS) Transportation Development Plan (TDP) Stakeholder Interviews: Top Line Results and Recommendations

This memo serves as a general summary of in-depth interviews with 32 community stakeholder group representatives including business leaders, education leaders, user group leaders, local elected officials and others with local political and transportation-related issue knowledge and experience. 24 of these interviews were conducted by Elizabeth Andrews, Senior Consultant with M+R Strategic Services. Mathew Cramer, an Americorps VISTA for the SAVE Foundation, was recruited and briefed by M+R Strategic Services to conduct 8 additional interviews that were recommended by M+R to be completed prior to the finalization of the HATS TDP.

The primary goals of the stakeholder interviews were to assess general knowledge of HATS, tap into that knowledge base for some general guidance, and gauge willingness to get involved moving forward. Note that all interviewed expressed an interest in continued communications about the TDP and HATS, many volunteered to help distribute the TDP Community Surveys and/or the link to the survey to the constituents they serve. Several also offered to provide a link to the community survey in their respective newsletters, and most attended the stakeholder roundtable discussion.

The stakeholder roundtable discussion was organized with goals including: continued engagement of existing stakeholders; more input from a broader group of community leaders; broadening the knowledge base of HATS and other transit systems, and gauging level of interest for continued involvement in HATS activities. More than 57 community stakeholders, including two City Commissioners and one County Commissioner participated in the event. Reporters from the Helena Independent Record and two television stations attended and reported on the event. Helena Civic TV filmed the event and, to date, it has been aired seven times in the community.



THEMES FROM COMMUNITY INTERVIEWS

General

- Transportation options important to stakeholders interviewed included driving, walking, transit, biking and scooters. Several respondents cited intercity bus and rail as an underdeveloped opportunity in our state. Such options could “spur the use of transit, biking and walking options at the community level.” Some expressed concern that freight transportation via rail is becoming a problem in our community, contributing to traffic congestion at key intersections and placing an impact on fuel consumption, air quality, and work and school schedules.
- Several of the stakeholders felt that walking infrastructure in and around existing and future transit stops needs to be addressed, as “...we can’t expect people who are actually able and willing to walk to a bus stop, rather than use curb to curb service, to do so if there are no sidewalks or the existing sidewalk is hazardous.”
- Most stakeholders believe local government plays an important role in infrastructure education, planning, construction, maintenance and repair, including transportation related infrastructure. Many felt that local government should assure existing transportation infrastructure is safe and maintained and that citizens can get to and from destinations safely, reliably and affordably. Examples of destinations cited include work, essential services, education, childcare, shopping, recreational and faith based opportunities.
- Most stakeholders envision a transit system that continues to meet the needs of those who *cannot* drive (seniors, people with disabilities, people without drivers’ licenses) or *cannot afford* to drive, but also meets the needs of commuters both within the city limits and beyond.
- Most stakeholders believe having a successful public transit system is important to the community for a variety of reasons, including: providing transportation options for those who cannot drive; transporting employees affordably to and from work; helping to reduce the impact of gasoline prices on household budgets; contributing to public safety, health and economic development, tourism, economic development and reducing traffic congestion. Several discussed the value of exposing community youth to transit as a transportation option for single vehicle travel.
- Most stakeholders feel that transportation plays an important role in our community both from a human services and economic development perspective. With regards to economic development, several stakeholders discussed how transportation not only gets people to and from destinations, but attracts new businesses looking for a community with multiple transportation options for their employees. Some discussed

the added economic benefit of transportation options of to real estate value and more money available to be spent by the consumer at the business or service, rather than getting to and from the destination.

Knowledge of the HATS System:

- The majority of respondents indicated general familiarity with HATS as the provider of transit services in the community for seniors and people with disabilities, but had little knowledge of the range of services HATS provides or how HATS is currently funded.
- Those that did have knowledge of the system were primarily from the health and human services sector and felt that HATS has done a good job of getting those who cannot drive to and from work and services.
- Virtually all stakeholders interviewed perceived HATS as a positive asset to the community, particularly for seniors and those with disabilities, and think the time is right for expansion of services.
- Several stakeholders shared that while they are unfamiliar with the HATS System, their knowledge of and vision for transit comes from their positive experiences with transit in other communities around the state and country.



The top-performing attribute of HATS is:

- The service HATS provides to community members who cannot drive (i.e. low-income population, seniors, and people with disabilities).

Areas of HATS that could use improvement moving forward:

- Many stakeholders expressed a desire for HATS to add routes (especially to identified key areas in the city limits) and provide adequate frequency of service on those routes. Some suggested HATS consider additional expansion of services, including evening and weekend service and commuter routes to East Helena, North Montana, Montana City and West Helena. Several suggested HATS to continue to explore transit opportunities around special and recreational events.
- A significant number of stakeholders thought HATS could do a better job communicating about its existing services and activities, as well as, coordinating (and perhaps even consolidating) some services with other transportation providers.

- Some stakeholders suggested HATS cultivate public private partnerships with major employers and other business community members.

Expanding the Funding Base

- The vast majority of stakeholders interviewed did not know exactly how or at what level HATS is currently funded.
- Once explained, respondents offered a number of ideas for funding system improvements moving forward. Beyond maximizing efficiency of current use of funds, top suggested ideas for raising additional revenue for improving HATS service included:
 - pursuing partnerships agreements with private sector entities;
 - soliciting Lewis and Clark County for more funding;
 - soliciting the Montana Department of Transportation for more funding;
 - creating an urban transportation district/mill levy increase, to fund transportation related projects including, transit, sidewalk repair and completion, ADA requirements, repairing unsafe intersections, road and bridge repair, transit, sidewalks, etc.;
 - financial partnership with “anchor” businesses and entities;
 - yearly contributions from key users;
 - local option gas tax to fund transportation related projects including, transit; sidewalk repair and completion, ADA requirements, repairing unsafe intersections, road and bridge repair, transit, sidewalks, etc.;
 - meters at capital complex to fund transit;
 - increasing the fare;
 - a transportation impact fee to generate revenue for transit capital expenses; and,
 - better coordination with and/or utilization of various social service agency transportation related funds.

What would be Required for Involvement and Support Moving Forward:

- An overarching long-term vision for HATS by community and elected officials.
- Communication of TDP findings, recommendations and implementations activities.
- Communication of reasons why the public should support the transit system, including broad community wide vision and issues such as access to essential services, unpredictable gas prices, household budget challenges, congestion, aging population, social equity and air quality.

- Clear explanation of exactly what increased funding would buy the community in terms of specific service improvements.
- Leadership: Top supporters would need to be local elected leaders, major employers and business leaders
- Additional Research: Suggestions included conducting research on how other communities have successfully consolidated into a more centralized transit system and/or met expanding commuter needs, community wide polling, and best practices funding methods for similar systems. Note that some cited existing assessments that might be of value to HATS (No Kid Hungry Capacity Assessment, Lewis and Clark City-County Health Impact Assessment and Helena Urban Versus Rocky Boy Rural Transit System Comparison).

M+R Strategic Services Recommendations: Continued Community Involvement

Based upon stakeholder eagerness to be interviewed, key responses to the questionnaire, depth and breadth of the discussions, event participation and positive feedback, we believe there is the potential to build a solid level of support for improving HATS service and funding. During the interviews, no one shared strong resistance or pessimistic views for the chances of success for HATS to improve and/or expand existing services. This gives HATS an opportunity for continued engagement and support from community leaders. Our recommendations:

- Maintain and continue to build relationships with general community, stakeholder group representatives, elected officials and the media. Consider developing a Communications Plan, as well as, training staff on strategies and tools for communication success.
- While stakeholders have generally positive feelings about HATS, there is a lack of deep understanding about the system and how it is funded, at this point. This provides more opportunities to communicate about HATS, build strong relationships and engage stakeholders in TDP implementation activities over the next five years and beyond. Recommended activities that will help foster continued stakeholder engagement in HATS include:
 - Continue to identify and outreach key community stakeholders including a representative from the Veteran Administration, First Student, American Association of Retired Persons, State Fund and the mental health community.
 - Organize a stakeholder TDP briefing “event” as a kick off to the public comment period, if possible, but certainly prior to the final commission vote.

- Engage stakeholders in TDP final approval including communicating to list about hearing process, public comment opportunity and final hearing comment opportunity.
- Organize constituency group-based work sessions to assist with TDP Implementation activities (i.e. funding, improvement of existing route(s), development of new route(s)).
- Organize yearly TDP progress update “events” as an opportunity to continue to educate and engage the broader community in HATS.
- Review, evaluate and update the HATS Transit Advisory Committee Goals, Objectives, activities and expand membership where appropriate.
- Identify and regularly participate in key group meetings (i.e. Non Motorized Transportation Advisory Committee, Chamber of Commerce Transportation Committee, Board of Health, Hometown Helena), giving updates on HATS.

Interview Methodology

After consultation with HATS Manager Steve Larson, we began building an initial list of community leaders, business leaders, local elected leaders and others with knowledge of transportation issues in Helena. This list became our initial outreach objective, with the expectation that it would grow significantly as participants we interviewed directed us to additional community leaders. With the guidance of Steve Larson, additional city staff and several TAC members, we developed an interview questionnaire that helped guide the individual discussions with community stakeholders. Most of the respondents received the questionnaire via e-mail prior to the interview. A HATS brochure was offered during the interview. All of the interviews were conducted face-to-face and generally lasted close to one hour. Each interview was followed up with a “thank you” email. All stakeholders interviewed were invited to the broader community roundtable, as well as the HATS Open House. A list of recommended contacts for additional interviews was created for future outreach.

LIST OF STAKEHOLDER INTERVIEW PARTICIPANTS

Stakeholders Interviewed by Elizabeth Andrews, M+R Strategic Services:

Dan Bingham, UM Helena.
Kathy Burwell, Helena Chamber of Commerce.
Sheila Hogan and Pam Carlson, Career Training Institute.
John Carter, Helena Independent School District.
Jack Casey, Shodair.
Mike Dowling, Downtown Helena BID/HPC Board of Trustees.
Walter Hanley, Rocky Mountain Development Center.
Jim Hardwick, Carroll College.
Sharon Haugen, City of Helena.
Brian Johnson, Family Promise.
Saundra Lowry, Area IV Agency on Aging.
Bob Maffit and Britney Moen, Montana Independent Living Partnership.
Joe McClure, MBAC.
Ron Mercer, Helena Regional Airport.
Drenda Neiman, Youth Connections.
Alan Nicholson, Great Northern Town Center.
Greg Olsen, Helena Non-Motorized Travel Advisory Council.
Robert Peccia and Mark Key, Peccia and Associates.
Melanie Reynolds, Ben Brower and Karen Lane, Lewis & Clark City-County Health Department .
Sarah Sadowski, Non-motorized Transportation Advisory Committee.
Jim Smith, City of Helena/Lewis and Clark-City County Board of Health.
Peggy Stebbins, St Peter's Hospital.
Jim Stipich, Student Assistance Foundation.
Roger Stone, Episcopal Diocese of Montana.

Stakeholders Interviewed by Mathew Cramer, Americorps VISTA for the SAVE Foundation:

Commissioner Matt Elsaesser, Helena City Commission
Commissioner Andy Hunthausen, Lewis and Clark County Commission
Mike Hruska, Capital Taxi
Lisa Lee (and Jesse Sheava, Americorps VISTA), No Kid Hungry
Tim McCulley, United Way
Vanessa Sandoval, Helena Indian Alliance
Amy Tenney, Helena Pre-Release Center
Teri Wright, YMCA

Helena Area Transit Service Transit Development Plan

Stakeholder Interview Questionnaire

Introduction

How people are transported is an essential component of any vibrant, thriving community. Transportation helps connect Helenans safely and reliably to jobs, essential services like health care and education, and important activities like shopping and recreation.

Helena Area Transit Service (HATS) is in the process of developing an update to the current Transit Development Plan (TDP) and Business Plan for the City of Helena. Combining analysis with rider and stakeholder group input, this plan will help HATS to establish goals, set measurable transportation objectives and develop an operational and business plan to implement activities and achieve the recommended short and long range goals changes over the next 5 years. These plans will serve as catalysts for HATS, allowing the organization to make sound, effective business decisions based on an in depth understanding of the Helena area market, HATS goals, and the budget. HATS and the Helena Transportation Advisory Committee (HTAC) will also gain a better understanding of the transportation market and identify areas to coordinate. As a result, transportation services in the Helena area will improve and the needs of area residents will be better met.

As part of the TDP process, we are interviewing key community stakeholders. These interviews will help inform the TDP Consultant and HATS on a range of issues including: stakeholder group transit needs and whether those needs are currently being met; how current transit services are being used and perspectives on the quality of those services; barriers to increased use; vision for our communities transit system; opportunities for improving and expanding service; and commitment to transit related activities moving forward.

General

How many employees/members/clients do you have? Where do they live? How do they currently get to work/services?

Which transportation options are important to you and/or your organization?

In your opinion, what is the role of local government when it comes to transportation?

With regards to transit, what types of services are you and/or your organization most interested in and why (i. e. curb to curb, fixed route, voucher, ride share, special events, combination)?

Generally speaking do you think there are enough transit services in the Helena area?

Generally speaking, what role do you think transportation options and connectivity play in a community's economic development?

Generally speaking, what is your vision for transit in Helena?

Knowledge of the HATS System

What is your understanding of the how our current system works and is funded?

What, specifically, do you think HATS has done well in the past?

What, specifically, do you think HATS could do better moving forward?

How would you suggest HATS service be funded moving forward?

Is there any specific information and/or research that you think would be valuable to HATS, at this time?

Political Landscape

What do you think the political appetite is for improving transit services in the Helena area? For example:

- Maintaining the status quo.
- Optimizing *existing services with an investment at or close to the current level.
- Optimizing *existing services with an investment greater than the current level.
- Investing in a system that optimizes existing services and extends to meet commuter needs (i.e. design routes with consideration of hubs like the capital complex, major employers and colleges, health services, airport service, the VA routes from the north valley and east valley).

What do you think are the greatest barriers to improving the existing transit system?

What could HATS do to help overcome these barriers?

What support would be necessary in order to improve transit services in the Helena area?

What might be the speed bumps/challenges?

What other Helena businesses, user group representatives or individuals would you recommend we contact during this planning process?

Who might oppose improving transit services in the Helena area?

Involvement

What motivates you, personally, on transit issues?

What would help continue your commitment to improve transportation options like transit, in Helena?

At what level would you want be involved in HATS moving forward?

- Continued communication about plan activities, results and next steps recommendations?

- Involvement of your members and/or network in TDP activities (i. e. circulate surveys to employees, promote public events, attend events)?
- Education of your members and/or employees about HATS services?
- Participation in Helena Transportation Advisory Committee (HTAC)?
- Other?

How do you want to be communicated with, moving forward?

**Examples of optimizing existing services:*

- *Switch services from predominately curb to curb, to predominately fixed or deviated routes (like peer communities*
- *Limit curb to curb to people with disabilities who cannot access the fixed routes, in accordance with the Americans with Disabilities Act, and like peer communities (current curb to curb riders who shift to fixed route would lose front door convenience but no longer need to call a day in advance to schedule a ride).*
- *Increase funding to existing successful routes.*
- *Use technology to improve efficiency and customer information*
- *Invest in bus stop infrastructure*

Appendix C: Surveys

Comments from On-Board Surveys

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Checkpoint	it ran on evenings and weekends.	Sometimes jam packed; sometimes it runs early, which is infuriating. Would be good to stop at 100 S Warren; it used to go there. One driver goes the long way between the hospital and mall, making the bus later.	1	1	1	1										
Curb to Curb	they had later hours and ran on the weekend	more availability	1	1	1											
Checkpoint	the bus stopped closer to my home for check point	Run on weekends and earlier in the morning. Most of my jobs start at 6:00 am	1	1	1											
Checkpoint	longer hours, evenings, weekends	more checkpoint stops	1	1	1											
Checkpoint	it went west ; ran until 7pm; Saturday	maintain busses, cover seats	1	1	1											
Checkpoint	weekends and evenings	More service towards Thriftway.	1	1	1											
	it ran on weekends and nights	run more often	1	1				1								
Curb to Curb	it ran on the weekend and evenings	more buses & routes	1	1												

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Checkpoint	they would have weekend services	longer hours of running	1	1												
East Valley	it ran on weekends and had more hours	better communication with dispatcher	1	1									1			
East Valley	run on Saturday an Sunday	curb to curb and Holiday schedule	1	1							1					
East Valley	it had weekend service	I need 7-day commute service. On the weekends I have to pedal extra hours. The winter is extra grueling.	1	1												
Curb to Curb	it was available during weekends and late evenings (concerts etc. for getting out)	keep up the great job!	1	1								1				
Checkpoint	it ran evenings and weekends		1	1												
Checkpoint	it ran later and on the weekends	run later and on the weekends	1	1												
East Valley	There was a Saturday bus	It would help to have a 5:00 pm run for East Helena again for those who work until 5:00 pm.	1	1												
Curb to Curb		later in the evenings; weekends would be nice. Could 6/5 X be on bus schedule.	1	1												
Checkpoint	more locations to the west part of town,	Do scheduled maintenance on these buses. They break down every other day.	1		1		1	1								

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
	weekends, more often															
Checkpoint	west side of town more often, Saturday	maintain buses, clean them, plastic seats	1		1		1									
Checkpoint	checkpoint went in 2 directions; service in west side of town; weekends		1		1					1						
Checkpoint	just more buses on Saturday and Sunday	buses need to be going on the west side of town.	1		1											
Checkpoint	available on weekends.	checkpoint would add more stops.	1		1											
East Valley	it was on time, ran on weekends, and ran between 11 and 2.		1			1		1								
Checkpoint	was on time and had weekend bus		1			1										
East Valley	it ran nights and weekends	run more often	1					1								
Curb to Curb	were offered on Saturday and Sunday		1								1					
Curb to Curb	it were		1													

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
	available weekends															
Checkpoint	ran on the weekends		1													
Checkpoint		Saturday services	1													
Checkpoint	they ran on Saturday	run on Saturday, especially during the winter	1													
Checkpoint	it ran on Saturday		1													
Checkpoint	you had a weekend bus		1													
Checkpoint		weekend service	1													
Checkpoint	weekend rides; need a stop closer to YMCA	Have a weekend schedule. Jackson St needs a bus stop shelter to stay out of the weather. I love the checkpoint drivers, they are great. Very friendly. Yes there are delays but if you rode the bus you would understand. A lot of times it is late because of people, traffic, etc. The drivers try hard and they work together, which is very nice. Driver X and Driver Y are the best.	1						1	1		1				
Checkpoint	they had Saturday service		1													
Checkpoint	it ran on weekends		1													
East Valley	weekend service		1													
East Valley	it ran on weekends	Saturday	1													

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Checkpoint	there was a Saturday bus		1													
Curb to Curb	weekends		1													
Curb to Curb	it ran on the weekends		1													
Checkpoint	run on weekends		1													
Checkpoint	weekend runs		1													
Checkpoint	it ran on the weekends		1													
Checkpoint	they had a weekend bus		1													
Curb to Curb	you ran on weekends		1													
East Valley	it ran more days of the week	good as it is	1									1				
	it ran on weekends		1													
Curb to Curb	weekend scheduling were available. Oh man, that would be sooo cool. Even if only phones for week schedule. [dial-a-ride only available during the week.]	Get checkpoint new guy shot. He's made me late three times. How hard is checkpoint really? Even an hour early once, and he missed a whole run.	1													

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Checkpoint		Many would like weekend trips. X is an excellent driver and is great with the people.	1									1				
Checkpoint	I only use HATS. For the size of Helena, it's amazing	would be nice to have a bench. Curb to curb helps a lot. Weekends would be nice.	1						1			1				
	I needed to	transportation on Saturday and Sunday	1								1				1	
	it ran on weekends		1													
	they ran on weekends		1													
Checkpoint	it ran on weekends.		1													
Checkpoint	they worked on weekends		1													
Checkpoint		Weekends	1													
	it ran on weekends	have buses running both directions on each route so that you don't have to ride for an hour to get to a nearby destination	1							1						
Curb to Curb	I knew about transfers downtown.	I want more information about Checkpoint	1											1		
Curb to Curb	it stays itself and if it ran on weekends.	None	1													
East Valley	it also ran on weekends	I appreciate HATS	1									1				
Curb to Curb	it ran on weekends	I work on weekends and have to pedal a long way without weekend service.	1													

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Curb to Curb		run on weekends	1													
Curb to Curb	had weekend service.		1													
Curb to Curb	they had service on weekends		1													
Curb to Curb	they ran on weekends / Saturday. No Sundays, everybody needs a day off.		1													
Curb to Curb	it had weekend service	keep up the good work	1									1				
East Valley		maybe Saturday or Sunday. If not run holiday or answer machine.	1													
East Valley	the need arose	Weekends	1													
Checkpoint	it ran more often; it ran on time	Just frequency and availability at times. I work over night.		1		1		1								
Curb to Curb	I use it very often already. Maybe if it ran later in the evening.	Sometimes they run late but that cannot be helped. Great service. I really enjoy riding it.		1		1						1				
Checkpoint	> It ran an hour earlier and later so that I could arrive on time and work late >	Two checkpoint buses on 30 min routes, running N&S and E&W with multiple transfer points / or / two checkpoint buses on separate 60 minute routes going in opposite directions. The fact that it is faster to walk		1		1				1						1

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
	it was more predictable > I never had to ride longer than it takes to walk > Note that estimate number of rides per week varies greatly - 7 rides per week is a very rough estimate	downtown from Ramey (Park?) - especially including wait times - devalues the bus ride.														
East Valley	It were more reliable. The bus often makes me late for work.	Have a clear and official bus stop at each place the bus stops. No 4 hour lunch dead period. There's no service between 10:30 and 1:30.		1		1			1							
East Valley	it ran later, till 8 or 9.	Second East Valley bus running during busy hours.		1		1										
East Valley	more than one East Valley trip per hour and I have to ride early because they don't run from 11 to 1.			1				1								
East Valley	it ran later until 8 or 9 pm	second East Valley bus		1				1								

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Curb to Curb	it was available in the evening	I appreciate and honor HATS. I don't know what I would do without them.		1												
Checkpoint	later bus ride	Good		1								1				
Checkpoint		longer hours		1												
East Valley	they ran from 11-1	No		1												
East Valley	everything is fine	everything is fine but I would like availability from 11am to 1pm		1												
East Valley	there were more pickup time in east Helena	I wish they would bring back the 11:00 run for East Helena route.		1												
Curb to Curb	it ran later	not at this time		1												
East Valley	it ran later at night			1												
Curb to Curb	Early morning curb to curb service was available with pickup at 6:15 am			1												
East Valley	if the bus ran until 4:45 or Saturday morning			1												
East Valley		a holiday schedule/ service		1												
Curb to Curb	later at night			1												
Curb to Curb	it ran later in the evening, at	later, after 5:00pm, and Saturday would be nice.		1												

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
	least 6:00 pm or 7:00 pm															
Checkpoint	it was reliable, clean, and sanitary	new equipment, new routes, VA Hospital route			1	1	1									
Checkpoint	it were on time more	change routes to avoid construction; add more buses.			1	1										
Checkpoint	better seating, shorter travel times, friendlier drivers	Split route so bus route is shorter. One bus is not enough.			1		1						1			
Checkpoint	it ran more often	we need more stops and busses			1			1								
Checkpoint	more downtown stops, more frequency				1			1								
Curb to Curb		Great service! Be nice to have a stop closer to the Pizza Hut by Walmart; it would cut 5 to 8 minutes from my walk home; by Subway would be even better.			1							1				
East Valley	you had more stops; you had more routes				1											
Checkpoint		Add a VA run 9-4pm daily			1											

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Checkpoint	I already use it daily, love the service	Need a stop by YMCA. better shelter bus tops. Jackson Street bus stop the worst, have to stand by a dumpster. This is a great affordable service. Got great drivers. Just need better buses. And people need to quit fussing about the drivers being late. If you don't ride daily you don't understand what they go through. Traffic, construction, and people in wheelchair service.			1				1			1				
Checkpoint	nothing; HATS is my only transportation.	A run out past Euclid would be nice.			1											1
Curb to Curb	it had several routes. Then I wouldn't have to call ahead of time.	If it could have a couple routes you wouldn't have to call a day ahead.			1											
Checkpoint	there were more service	I love your city. I love X the Bus Driver. He is the coolest bus driver.			1							1				
East Valley	If bus went to western part of town	None			1											
Checkpoint	more stops were available	more routes, west side router, pull outs on street, monthly passes, disabled passes (less paper and money)			1				1							1
Checkpoint	it covered a larger area	Checkpoint radio is a stress trigger for this rider with PTSD. Earplugs are "a must".			1											1
	they extended to west side				1											
Checkpoint	there were	add more stops on west end			1											

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
	more stops															
Curb to Curb	more route buses with a larger service area	more marked bus stops and a park and ride services			1				1							
East Valley	it delivered me to my destination				1											
Curb to Curb	I had more to do; if it would encompass Fort Harrison.	I'm completely satisfied with the service. Thank you.			1							1			1	
Curb to Curb	my husband became unable to drive.	I think you do a wonderful job and provide a needed service. I hope it expands. [contact information provided]			1							1			1	
East Valley	there were more stops and routes				1											
Checkpoint	bigger buses, ran more on time in the afternoon.	Bigger buses and maybe more buses so checkpoint runs on time.				1	1									
East Valley	they were on time	better seat belts (this was one of several people who didn't understand "bus stop amenities" and put a "?" - in future we should list a few examples like benches / shelters / lighting / etc.)				1	1									
East Valley	the bus was reliable and on time.	The bus should run through lunch hour. Not off from 10:30-1:30 - big gap.				1		1								

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
East Valley	the scheduled stops were on time more often					1										
Curb to Curb	I could make all my appointments	no/great				1						1				
Checkpoint	if it was on time	change the bus route to avoid construction				1										
East Valley	keep their hours on the bus where people have to wait	keep their hours on the bus where people have to wait				1										
East Valley	they were on time to pick up their passengers in East Helena	When someone calls into the Satilite to catch or set up a bus, the person answering in the morning needs to be nice on the phone.				1							1			
East Valley	on time at times					1										
East Valley	it was on time					1										
East Valley		bus on time				1										
Curb to Curb		be on time				1										
	they would be on time	if they would be on time				1										
Curb to Curb	I needed it.	on extremely cold morning a knock at the door to be warm and don't have to stand outside too long for you. Thank you! Very satisfied with your service.				1						1			1	

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Curb to Curb	there is an emergency like the need to go to the hospital, doctor, or go to work on holiday too. Shopping on weekend maybe.	Be on time for work. Be polite on phone. Schedule too.				1							1		1	
East Valley	there were nice bus stops and it was on time. It's never on time. A set schedule.	More drivers like X. Very helpful. We need warm bus stops.				1			1			1				
East Valley		be on time. We have to wait at the stop without a bench in the cold, sometimes 30 minutes. (group of 7)				1			1							
East Valley	my sister went to choir more	more comfortable seats					1								1	
East Valley	I could get a hold of them on the phone						1						1			
East Valley		better seats					1									
Checkpoint	it offered smoother rides during pregnancy						1									
Checkpoint	I use HATS all the time. Great	better busses					1					1				

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
	service															
		comfier chairs no payment					1									1
East Valley		larger buses for all routes					1									
Checkpoint	ran more often							1								
East Valley	it came more often to get away	None						1								
Curb to Curb	I needed a ride more often														1	
East Valley	knew more how to transfer in Helena "checkpoint"	schedules etc. for "checkpoint?"												1		
East Valley		I think I will ride this bus more														1
Curb to Curb		great service! thank you										1				
Checkpoint	I had places to go														1	
Checkpoint	my food wouldn't go bad making the 1 hour trip back and walking with bags is hard. I take the taxi back.	Not a bad experience since I've always had a car and drove but city transit is very helpful.								1		1				
Curb to Curb	I needed to	Have had some communications problems. Would be nice if dispatcher worked same hours as drivers.											1		1	
Checkpoint	I could afford it														1	

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Checkpoint		it's a great service										1				
Checkpoint	I am a visitor	None														1
Checkpoint		good job										1				
Checkpoint		City bus service is like police or fire departments. Should NOT be operated with PROFIT as its mission. Unacceptable!														1
East Valley	HATS then a school bus more	stay seated														1
Curb to Curb	I had more appointments														1	
Curb to Curb		I have no complaints														1
	I needed it														1	
Checkpoint	it ran at night and on weekends															
Checkpoint	I have to get a hip operation next week	I think HATS is awesome. Bus drivers are so sweet and the ride is nice.										1			1	
	I needed to	glad the service is available										1			1	
		You are a godsend to us.										1				
East Valley	I felt well enough to get out more often (on question about number of trips he put 2 round trips per month)	Service is really good and appreciated. If not for HATS would not be able to get out.										1			1	

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
East Valley	I needed/wanted to	more flexibility													1	1
East Valley	I had to	No													1	
East Valley	I needed to get places	None													1	
	I had to work														1	
	no transportation															1
Checkpoint		keep up the good work.										1				
	I had more places to go														1	
Checkpoint	HATS were more like other Montana towns.															1
Checkpoint	I needed it														1	
	I got a hip operation and it's hard to walk.	I love the HATS bus										1			1	
Checkpoint	I had a job														1	
	it were safer															1
Checkpoint	I already use it all the time	I'm happy with HATS										1			1	
Checkpoint	I'd use it about the same. I don't have a complaint about the	Seating at stops would be nice.							1							

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
Checkpoint	schedule.															
Checkpoint		This is a great service considering the size of the town. I've lived in large cities and in some ways this service is much better. Please do not do away with HATS.										1				
Checkpoint		HATS is good										1				
Checkpoint	I were retired	Good										1			1	
Checkpoint	I had more days to do so.														1	
	the weather is inclement	Service and the people are super. Thank you.										1			1	
Curb to Curb East Valley		employees be more friendly											1			
East Valley		everything is fine										1				
East Valley	if it were cheaper	n/a														1
Curb to Curb	I needed to go somewhere	You do a good job										1			1	
Curb to Curb	I could be weather free.	Keep all the wonderful bus drivers. Laugh										1			1	
Curb to Curb	I needed more groceries.														1	
Curb to Curb	I use it almost every day.														1	
Curb to Curb	I didn't have a ride home.														1	
Curb to Curb	I needed to.														1	
East Valley	your service is very good and your drivers are	Thank you for the service.										1				

Route	I would use HATS more often if...	Do you have any additional comments on how HATS may be able to serve you better?	Saturday/ weekend	Longer Hours	Expanded Service	Reliability	Buses	Frequency	Amenities	Route Design	Sunday	Compliments	Customer Service	Better Outreach	Need Based	Other
Total Comments	160	130	69	37	33	27	13	12	9	5	3	39	9	2	34	16
	great.															
Curb to Curb	I knew Helena	Dispatch is mean & rude.											1		1	
Curb to Curb		excellent!										1				
Curb to Curb		I wouldn't mind if the fare was a bit higher.														1
Curb to Curb		everything is good										1				
East Valley	they keep one driver on the bus and have one driver be the one	Need to be organized and be nicer to the passengers when they call in and be on time to pick up the riders.											1			

Question 4: What is your primary reason for using HATS?

Checkpoint	disabled - low vision
Checkpoint	blind/disabled
Checkpoint	but I do have a drivers license
Curb to Curb	Lost my license a year ago
Curb to Curb	I am a double amputee
Curb to Curb	shorten my pedal [bike commute]
Curb to Curb	Ride to work
Curb to Curb	Gas
Curb to Curb	Can't drive for 6 months - heart surgery
Curb to Curb	Exercise
Curb to Curb	Doctor's appointment
Curb to Curb	I am legally blind
Curb to Curb	my car broke down
Curb to Curb	Wheelchair
Curb to Curb	school activity
Curb to Curb	my wife went back to school for night classes and we only had one car
East Valley	I can't drive legally
East Valley	no insurance
East Valley	I can't drive, in pre release
East Valley	PRC (pre-release center)
East Valley	Don't drive anymore
East Valley	Lost my license
East Valley	also not supposed to drive
East Valley	DUI - unable to drive
East Valley	no license due to brain injury
East Valley	[save money on] gas
East Valley	lost license
East Valley	Pre-release
East Valley	no insurance
East Valley	Can't drive for 6 months - heart surgery taking meds and can't drive today

Question 11: If bus service were not available, how would you make this kind of trip?

East Valley	ride with roommate
Curb to Curb	I'm in a wheelchair - stay at home
Curb to Curb	mother would take me
Checkpoint	I'd be screwed
Checkpoint	walk 3 miles
Checkpoint	I have no other way to get around
East Valley	foster care providers
Curb to Curb	do not know I would not be able to make this trip alone
Checkpoint	but distance is too far to walk
Checkpoint	I'd be screwed
Checkpoint	too far to walk
Curb to Curb	have to find a ride

Curb to Curb	make arrangements
East Valley	find a different job
Checkpoint	someone would have to take me but expensive, \$12 one way on disability and pregnant
Checkpoint	
Curb to Curb	I would have to change jobs
East Valley	would have to walk excessively
Curb to Curb	40 minute walk

Question 5: What best describes the purpose of this trip?

Checkpoint	winter supplies
Checkpoint	visit daughter
Checkpoint	Food
Checkpoint	to see the area
Checkpoint	Library
Checkpoint	Prescription
Checkpoint	Food
Checkpoint	Our Place
Curb to Curb	volunteer work
Curb to Curb	getting out of the house
Curb to Curb	Education
Curb to Curb	Library
East Valley	mental health
East Valley	need a bike tire
East Valley	band practice
East Valley	trip home
East Valley	also checked shopping
East Valley	Medicaid Appointment
East Valley	mental health center
East Valley	Other
East Valley	Hobby
East Valley	getting home
East Valley	Business
	day treatment
	to go home

Question 14: What best describes your current status?

Checkpoint	disabled (10)
Checkpoint	Homemaker
Checkpoint	Medical
Checkpoint	SSDI
Checkpoint	Volunteer
Curb to Curb	blind and low vision
Curb to Curb	dialysis patient
Curb to Curb	disabled (4)
Curb to Curb	federal employee
Curb to Curb	Red Lion
Curb to Curb	Volunteer

	checked high/middle school but that's not possible with
East Valley	birthdate
East Valley	DD group home
East Valley	East Valley Middle School (2)
East Valley	employed in East Helena
East Valley	Handicapped
East Valley	HPRC
East Valley	in pre release
East Valley	mental health center
East Valley	work in east valley

Question 6: Where did you look up schedule information for your trip?

2220967849	Checkpoint	been using for 1 year
2220610945	Checkpoint	Friends
2212242893	Checkpoint	was told
2317126874	Curb to Curb	RMDC
2317116332	Curb to Curb	curb to curb
2317093251	Curb to Curb	HPRC
2317072692	Curb to Curb	HATS office
2277162731	Curb to Curb	been a HATS customer since 1989
2212101261	Curb to Curb	didn't look it up; waited at school
2307093708	East Valley	I learned from my friends
2307022019	East Valley	word of mouth
2301643063	East Valley	help from friends
2301602343	East Valley	asked bus driver
2301573884	East Valley	talked to drivers / management
2301537898	East Valley	Foster care providers
2283193132	East Valley	my husband
2276911087	East Valley	pre-release
2212140131	East Valley	HATS office

Question 7: How did you get to the stop where you got on the bus?

Curb to Curb	curb to curb pickup (42)
Checkpoint	live at a bus stop
Checkpoint	live at a bus stop
Checkpoint	Wheelchair
Curb to Curb	close to work
Curb to Curb	personal mobility vehicle
Curb to Curb	wheelchair
East Valley	got on the bus at work
East Valley	my mom
East Valley	PMV
East Valley	PRC (pre-release center)
East Valley	pre release
East Valley	wheelchair scooter
	another bus

Specific recommendations for routes

Westside (9)

VA (3)

Thriftway

checkpoint 2 directions

split route

Pizza Hut by Walmart, or

Subway

YMCA

past Euclid

Appendix D: Maintenance & Operations Review & Assessment

HELENA AREA TRANSIT SERVICE (HATS) MAINTENANCE & OPERATIONS REVIEW & ASSESSMENT

Operations, Vehicle Maintenance and Fleet Condition

Busman Technical Memorandum

FEBRUARY 20, 2013

Introduction and Background:

Current Transportation Solutions subcontracted with Busman of Missoula, to conduct a review of Helena Area Transit Service (HATS) operations, vehicle maintenance and vehicle replacement policies and practices. This review was conducted by Steve Earle, former General Manager of Missoula Mountain Line, and John Roseboom, Mountain Line's current Lead Mechanic. With over forty years of combined planning, administration, operations, and maintenance experience at a peer transit provider, Earle and Roseboom bring an expert outside perspective to these central elements of HATS business and operations plan.

The review focused primarily on day-to-day operations, fixed route structure and timing, paratransit service delivery, vehicle needs and planning for future vehicle replacement. Components of Checkpoint, East Valley Bus Service and Curb to Curb Service were all included in the review.

Following is a summary of the review process that formed the basis of Busman's observations and recommendations. The on-site review was conducted during a two-day site visit on January 8 & 9, 2013 and the desk review was concluded on January 30, 2013:

- **Introductory Meeting** – The site visit began with a meeting of Busman staff and Steve Larson, HATS Transit Supervisor. Discussion focused on current operations and maintenance procedures, service planning, service area definition and partnerships, expectations of the review, planning for future bus replacement and other MDT procurement requests. Recent organizational structure changes at HATS were discussed along with plans for future staffing.
- **Facilities & Equipment** – Busman staff toured the new HATS facility including the transfer center, operations /dispatch area, and maintenance facilities. We reviewed HATS fleet, bus barn(s) and maintenance facility.
- **Fixed Route and Curb to Curb Observations** – Busman staff reviewed and observed the operations of the Curb To Curb Service and rode the Checkpoint and the East Valley Bus Service routes on several rounds. Comments and suggestions for these services can be found later on in this report.
- **Interviews** – Busman conducted interviews with all key staff members along with maintenance staff, operators, and passengers.
- **Document Review** – Busman reviewed operational and maintenance documents. However HATS did not have some of the documents we requested. It is important to note that some of

the documents we requested are items that MDT and/or the FTA may wish to review in the future. To help HATS improve or create important documents, we have included draft outlines at the end of the section. We can provide draft language if requested. The following table summarizes our document review:

Documents & Records	Adequate	Needs Improvement	Needs to be Created	Needed for MDT/FTA Audit
MAINTENANCE & EQUIPMENT				
Maintenance budget and cost per mile records	Provided for review			Yes
Maintenance policy and procedures manual			Currently being created	Yes
Road call reports			Beneficial to document maintenance performance	
Periodic preventive maintenance records		No equipment specific forms used / City program		Yes
Operator defect reports and records	X			
Sample equipment work orders	X			
Communications equipment records	X			
OPERATIONS & MANAGEMENT				
Policies & Procedures Manual			Currently being created	Yes
Operators Handbook			Currently being created	Yes
Organizational Chart	X			
Safety records		Not Reviewed		Yes
Safety Training Manual		Not Reviewed		Yes
Accident package			Not on buses	
Ridership records per mile, per hour, and cost per ride	Provided to CTS			
Indirect work hour tracking documents			Not Tracked	Provides budgeting information and accounts for maintenance labor

Equipment and Maintenance

The overall condition of the HATS fleet was good and the vehicles seem to be adequate for the job they are required to do. Overall, maintenance of HATS rolling stock appears to be adequate and cost-effective. However, as the system grows, indirect decision making procedures could cause problems.

We identified a variety of opportunities for equipment and maintenance improvements which are discussed below.

Vehicle Replacement Recommendations

HATS purchased all of its current vehicles with assistance from MDT. MDT now requires service providers at this level to develop a five year plan for vehicle replacement needs. During our interview with Mr. Larson, he indicated that it would be beneficial to HATS if they could have more input regarding system-specific vehicle specifications prior to MDT going out for bid.

- **Spec Input and Problem Equipment** – HATS should request greater input into specs MDT develops for purchase of new equipment. HATS has used and consistently had expensive problems with some equipment (ie: the 6.0 liter power stroke). Management should work with MDT to develop specs that restrict such equipment from being included in future bids.
- **Staging New Bus Purchases** – Try to stage vehicle replacement so spread out budget impact to HATS and MDT.
- **Bus Appearance** – HATS should consider making changes in the appearance of the buses so that the public can differentiate between the fixed route and curb-to-curb services.
- **Surveillance Equipment** – We discussed the addition of video surveillance equipment to the fleet. This has become standard practice for public transit systems. It reduces risk and liability and increases passengers' feeling of safety. A price/cost analysis should be developed to determine where this equipment best fits in future vehicle procurements. Insurance records, loss runs and city policies, on current insurance should be reviewed in order to measure the risk management value of this equipment. This type of accountability and documentation is rapidly becoming an industry norm at all levels of public transit.
- **Advertising Racks** – Current ads and messages placed on HATS buses could use an upgrade as new vehicles are planned for. Installing interchangeable racks makes it far easier to market to potential advertisers and this revenue stream is relatively untapped.

Equipment Review & Recommendations

- **Undercarriage and Engine Compartments** – Undercarriage and engine compartments were clean and well maintained.
- **Driver's Area and Bus Interiors** – The driver's area and bus interiors were clean and well maintained.
- **Bus Exteriors** – Some of the bus exteriors could use some light body work.
- **ADA Equipment** – ADA equipment was serviced and available. Operators need to recycle the lifts as part of their pre-trip and post-trip inspection.

- **Mobility Devices & Seating Capacity** – Fold-up seats in the securement area were left up at all times (even when the area was not in use) creating less seating capacity. When Checkpoint buses have mobility devices secured on board seating becomes very limited.
- **Fare Collection Equipment** – Fare collection equipment functions well. However money handling procedures need to be improved as discussed in the Operations and Management section below.

Maintenance Program and Documentation Review and Recommendations

HATS has an unusual transit vehicle maintenance program in that the City of Helena manages the transit vehicle maintenance as part of its citywide vehicle department rather than as a section of the transit service. This organizational structure creates a number of potential problems. There is a lack of direct accountability to the transit supervisor for maintenance performance and purchasing. Additionally, it is difficult for the transit division to manage and track maintenance costs, which creates budget planning challenges. As the system grows, this indirect decision making could cause excessive outside repair costs and communication of problems internally may cause delays in timely repairs. If there is an increase in issues such as those noted below under Operator Deficiency Reports, operators' frustration will increase making it more challenging for the Transit Supervisor to maintain good employee morale. Finally, as noted below some standard Federal Transit Administration documentation regarding maintenance programs could be done more thoroughly.

- **Maintenance Oversight** – As HATS grows and the budget increases, it will be more cost-effective to have bus maintenance directly supervised by the Transit Supervisor. The City of Helena should consider creating a bus maintenance department within the transit division. This change should provide more accountability as well as more structured employee supervision.
- **Preventive Maintenance** – Preventive maintenance is performed at intervals according to a City generated plan. More comprehensive documentation that is better related to transit vehicles should be considered.
- **Driver Inspections** – Driver's inspections were performed daily. Maintenance issues were identified and in most cases appropriate action taken. Additional documentation should be considered.
- **Operator Deficiency Reports** – Routine operator write-ups were not addressed in a consistent and accountable fashion. In particular, small items (ie: lights in convenience areas) were taking several shifts to repair.
- **Quality Control Inspections** – There were no records of quality control inspections.
- **Parts Room** – The lack of a parts room creates a need for staff to go outside of the facility, usually offsite, for almost all parts which results in increased labor costs.
- **Maintenance Plan** – We recommend developing a Maintenance Plan that addresses the record keeping and other issues identified above and includes development of a more complete Maintenance Policy and Procedures Manual. The plan should include employee performance incentives and a process for employee input. The Sample Documents and Policies section below includes sample outlines and forms for a Maintenance Policies and Procedures Manual, a Bus Inspection Sheet and ADA Lift Inspection checklist, and a Road Call Report.

Service Review and Recommendations

As noted throughout this review, HATS is in a period of growth and transition. HATS high cost per ride and the significant problems with on-time performance both indicate the need to redesign the current services.

Checkpoint

The Checkpoint fixed route has had rapid growth in ridership over the period since it was established and there appears to be a strong potential for further increases in ridership. At this point the Checkpoint route is too busy to operate comfortably or on schedule. Otherwise, it is a well-functioning circulator route that does not require transfers.

- **Routing Safety** – This route serves many parking lots, side streets, and areas behind stores where bus movement is difficult – especially at the Capital Hill Mall where the bus travels a long way through a parking lot. Traveling in a parking lot and reversing in a bus is a safety hazard, and in some cases not all operators run the route the same for these reasons. Specific point to point routing should be developed and adhered to.
- **Stop Location / Passenger Amenities** – Many Checkpoint bus stops are not clearly marked (especially Walmart). Many others are not ADA accessible. They are lacking concrete pads and other elements necessary to make them safe and functional for people with disabilities. Passenger Amenities such as benches and shelters are limited system-wide. Benches and shelters are important functional amenities that provide convenience and comfort for passengers. They are also excellent marketing tools for the service (even without ad racks). Seeing these amenities alerts the public to HATS' existence. Lighting is another important amenity that is lacking at a number of stops. Clearly marked stops would make it much easier for passengers to know where to wait, especially in the case of the route being assisted by the Curb to Curb service in order to get back on time. HATS' five year capital plan should include incremental plans for installing and improving passenger amenities including benches, shelters, and ADA access.
- **Schedule Time Points** – The public bus schedule lists specific time points for every stop. While this level of detail is useful for route planning and for including in an operator's turn-by-turn directions, riders probably do not need this degree of information. Moreover, an unintended consequence of providing this high level of detail is that we observed buses running so late that they appeared to be running early relative to the times listed on the public schedule. The Sample Documents and Policies section below includes suggested timetables and time points that would address this issue.
- **Operators** – Operators were generally very courteous, trying hard to be on time and willing to answer questions. However, operators sometimes turn around and go back to get missed or late passengers which is detrimental to the already chronically behind-schedule service.

East Valley Service

East Valley service is a deviated fixed route service that is based on a combination of fixed route and a dial-a-ride format. If funding continues to be made available this service should be closely examined for ways to become more cost efficient, especially when riders are allowed to schedule without a no-show

policy. Currently there is significant ridership in some areas while other areas appear only to be served in order to meet predesigned service criteria.

Curb to Curb Service

HATS operation of its curb-to-curb service is one of the most liberal we have ever seen for this type of public transportation. While it is a great asset to the community and well used, the drawback is that it has the potential to generate an extremely high cost per ride. Recommendations for striking a balance between service with cost are:

- **Scheduling** – Improve the scheduling process using industry standard software and designated staff.
- **No-Show Policy** – Develop a no-show policy for repeat offenders of scheduling expectations.
- **Eligibility Criteria** – Develop and gradually put into place service eligibility criteria similar to what is commonly used for complementary ADA para-transit.
- **Service Boundaries** – Better define the boundaries of this service and all of HATS services.
- **Transportation District** – Begin the development of a Transportation District for taxing purposes.

Schedule Improvement Recommendations

We have three recommendations for improving the information presented in the schedule that is available to the public in hard copy and on the web:

- **Map & Timetable** – The schedule map is a difficult to read and the timetable has a few more named/specific stops than are needed. Also, it is important to comply with ADA requirements regarding size of font and contrast when producing schedules.
- **East Helena Map** – The East Helena schedule states that there are no deviated stops in the city but does not have a map.
- **Schedule Time Points** – Listing specific time points every four to six minutes is generally adequate for a public schedule and would allow operators more flexibility to meet the time points without running late or early. See Attachment A for suggested format.

Marketing

Improved marketing could be very beneficial. A marketing plan should include exploration of ad racks, bus stop advertising, schedule advertising and joint marketing.

Transportation Demand Management & Mobility Management

The core TDM strategy is working with employers to encourage employees to commute using options other than driving alone. In smaller communities, TDM strategies often include direct outreach to the general public in addition to working through employers. Mobility Management is focused on working with social services providers to coordinate rides for their constituents. HATS should consider investing more resources in building the relationships and contracts needed to achieve more effective transportation demand management and mobility management in the Helena area by taking a lead in the Transportation Advisory Committees. As funding becomes more competitive these partnerships will become more important.

Operations and Management

HATS has developed at great pace over the past ten years. What began as a dial-a-ride service has matured into a fixed route and paratransit service with a lot of potential to grow. The new transfer center is a terrific asset in a great location and it couples the local service with regional service. As HATS has grown three very specific problems have grown with it:

1. Due to increased ridership, it is no longer possible for Checkpoint to operate on time. Ways to increase reliability need to be enacted. Trip time goals should be equal to 110% of personal vehicle driving time. Currently, the majority of riders are transit-dependent riders. Until the on-time performance issues are addressed, HATS' service cannot be marketed to choice riders.
2. Scheduling Curb-to-Curb rides has become labor intensive and lacks the level of structure it should have to make the most of all resources (operations and equipment). As fixed route service expands and becomes more reliable, the curb-to-curb service should transition to a being operated as a complementary paratransit service with specific criteria for use of the service – typically transit services require paratransit riders to meet ADA eligibility requirements.
3. Service boundaries should be clearly defined and approved by the city and county and/or other partnerships and adequate funding should be secured from appropriate sources for service outside the City. For example, given the current cost and ridership for the East Helena service the County is not paying its fair share.

Operations and Management Review and Recommendations

- **Service Supervision** – No service supervisors were observed at any time during the review period. Operators report for work with limited supervision. Operators' radio communications and ability to coordinated assistance was very good from base and in route, but the direct responsibility for service safety and timeliness could use definition. A service supervisor rather than the senior driver approach would go a long ways to improve risk management and timeliness. A service supervisor's responsibility typically includes supervising operators; coordinating response to delayed routes such as temporarily deploying an additional bus ("wildcatting") to get a route back on schedule; and handling emergencies.
- **Emergency Procedures** – It was not clear how an emergency would be handled by the HATS staff other than everyone on site was very ready to assist at any time. A clear responsibility matrix and some practice drills are recommended.
- **Safety and Training Manuals and Records** – No information was made available to review.
- **Contingency and Emergency Plans** – Contingency plans and emergency plans relating to rerouting should be developed. Consideration should be given to having a set of predetermined secondary routes that can be used as a fall-back position. Copies of the local snow removal plan may prove helpful in establishing these routes.
- **Farebox Cash Handling Procedures** – Dual control measures are lacking. A policy and procedures addressing how fareboxes are emptied and fares collected needs to be developed and implemented for the safety and security of the system. Procedures should include requiring that two staff and no public are present when fareboxes are emptied.

- **Data Collection** – Passenger tallies are not clearly audited and some additional data such as standing room only trips, bicycles, and mobility devices would be helpful for future planning.
- **Funding Sources** – As HATS service demand increases, more detailed plans should be developed regarding local funding sources, county funding support, MDT/FTA funding opportunities and the roles the city of Helena and other partners will play.
- **Operations Management Plan** – A five year management plan should be developed for HATS, including timelines for creation of policy and procedures manuals for administrative and operations employees. These documents should include an operator handbook. Overall, the Management Plan should include employee responsibilities, performance incentive plans, schedules for staff meetings, opportunities and process for employee input, address reporting, definitions of employee expectations in regard to safe driving, and clearly defined disciplinary policies and procedures. Some relevant sample documents are included in the Sample Documents and Policies section below.

Recommendations Summary Table

Recommended Actions & Deliverables				
ACTION	LEAD RESPONSIBILITY			
	HATS Management	HATS Staff	CTS Team	Helena City Admin and Counsel
MAINTENANCE & EQUIPMENT				
Develop a maintenance plan and policies that documents safety procedures, record keeping and reporting issues required by MDT and the FTA.	Develop and Administer	Implement	Provide sample documents	Approve
Develop a five-year bus replacement plan including detailed HATS specific specs that allow MDT to set timelines for statewide vehicle replacement	Develop, implement and coordinate with MDT	Assist with developing specs	Draft plan and timelines and provide sample specs	Approve plan
OPERATIONS & MANAGEMENT				
Develop Management Plan including policy and procedures manuals	Develop plan, administer and oversee.	Assist with developing plan, manuals, and clarification of Operations / Maintenance responsibilities Implement	Provide sample documents	Approve and incorporate into oversight.

Recommended Actions & Deliverables				
ACTION	LEAD RESPONSIBILITY			
	HATS Management	HATS Staff	CTS Team	Helena City Admin and Counsel
Improve safety and emergency planning, training and documentation, including Safety Training Manual, operator training program, accident package, and contingency plans.	Develop plan, administer and oversee.	Work with HATS management to develop Implement	Provide sample documents	Approve and incorporate into oversight.
Compile comprehensive monthly ridership reports (cost per mile and per ride / rides per mile / etc.)	Develop reports	Collect data	Provide sample documents	Review and incorporate into decision making
When conducting annual financial planning: Review all potential funding sources including contracts Review peer group benchmarks.	Develop matrix of all potential funding sources		Provide resources for funding matrix Determine peer group benchmarks	Annually update financial plan.
SERVICE				
Develop five-year capital plan for improving passenger amenities	Develop and coordinate plan with MDT and City	Research local partnerships	Draft summary of existing, needs, peer comparison, and recommendations	Approve Plan
Revise public schedule to incorporate recommendations re: time points / schedule changes	Make changes to schedules and routes		Provide outline of changes / new schedule timing	Approve revisions
Update marketing plan	Develop Outreach and Marketing plan Implement		Provide outline and sample documents	Work with staff to update plan Approve with budget

Sample Documents and Policies

HATS OPERATOR HANDBOOK (sample outline)

History & Current Information of HATS

Organizational Chart

Service Description

Policy Manual Intent

Responsibility & Authority

Operators Guide

Operations Personnel

Reporting For Work

 Pulling Out A Bus

 Relieving A Bus In Service

 Miss-outs

 Supplies & Equipment

Appearance When Reporting For Duty

Operating Procedures & Regulations

Public Contacts By Employees

Routes & Schedules

Headsigns

Temporarily Leaving Bus on the Line

Unauthorized Driver

Operator Forms

 Time Card

 Operator Daily Report

 Customer Service Report

 Incident Report

 Run Paddle

HATS Policies

Employee Information

Driver License & Motor Vehicle Record (MVR) Standards for the number of violations and at-fault accidents in the MVR that is acceptable, borderline, or denied.

Accidents

Commercial License & DOT Card

Lost & Found

Drug Free Workplace

Workplace Violence

Weapons Prohibition Policy

Equal Employment Opportunity

Safety & Security

Prohibition of Sexual Harassment in the Workplace

Passenger Information & Confidentiality

Smoking

HATS Operator Training Guide

Sample Outline of Contents

Training Guide Intent

Responsibility & Authority

Operating Procedures

Supplies & Equipment

Pre-Trip Inspection

Pull Out Procedures

 Relieving A Bus In Service

 Pulling Into the Transfer Center

 Mobile Units

Pull In Procedures

 Mobile Units

Pulling In A Bus

 Mid Day Pull In

 End of Day Pull In

Bus Wash Procedures

Post Trip Inspection

Operator Daily Report

Two-Way Radio Operations

Mobile Phone Usage

Incident Report

Exhibits for Operating Procedures

1. Run Schedule
2. Radio 10 Codes, Emergency 10 Codes, Security 900 Codes
3. Farebox Codes
4. a, b, c, - Headsign Codes
5. Transfer & Next Bus Schedule
6. Pre-Trip Inspection List
7. Damage Sheet
8. Pull Out Routing Instructions
9. Transfer Center Parking Order
10. Bus Wash Schedule
11. Operators Daily Report
12. Incident Report

Temporarily Leaving the Bus On Line

Use of Restrooms

Purchase of Food or Drink

Personal Business

Customer Service

Public Contacts

Information to Passengers

Boarding & Discharging Passengers

Boarding Equipment for Assistance of Elderly & Passengers with Disabilities

Mobility Devices

Announcing Destinations

Sensitivity to Persons with Disabilities

Keeping Exits, Entrances & Aisles Clear

Seating Passengers Before the Bus is Started

Carrying Passengers Beyond their Destination

Waiting for Passengers at Transfer Points

Unnecessary Conversations & Visitors

Picking Up Passengers During Pull Out and Pull In

Transportation of Service Animals & Pets

Passenger Personal Items

Packages or Baggage

Bicycles

Strollers

Prohibited Items

Food & Drink

Audio and or Video Devices

Ejection of Passengers

Violence or Disturbance on Buses

Silent Alarm Procedures

Vandalism

Customer Service Report

Exhibits for Customer Service

1. Customer Service Report

2. Code of Conduct.

Defensive Driving

What Is Defensive Driving?

Standard Accident Prevention Formula

Accident & Accident Grading

Preventable Accident

Non Preventable Accident

Minor Safety Violation

Failure to Perform a Pre-Trip or to Report Damage

Accidents & Injury

Exhibits for Defensive Driving

1. Accident Report
2. Accident Determination Form

Care of Diesel Buses

General Knowledge

Warm-Ups

Gauges & Tell-Tale Lights

Air Pressure

Water & Battery

Shut Down

MAINTENANCE POLICIES AND PROCEDURES MANUAL

SAMPLE OUTLINE OF CONTENTS

Section I: Maintenance Policies and Procedures

Maintenance Policy

Work Scheduling

Preventive Maintenance

General Repairs

Work Order Procedures

Unit Rebuild Procedures

Component Control/Tag System

Scheduling and Control

Inventory Control

Issuance/Receiving of Stock

Shop Safety

Housekeeping and Building Maintenance

Hand Tools

Material Handling

Hazardous Material

Job Descriptions

Daily Cleaning Checklist / 1 Operators' Daily Report / 2 Inspection Report

SAMPLE HATS BUS INSPECTION SHEET

Bus # _____					
Mi. Due _____				Hotsied Engine Initial	
Mi. Started _____		Date Started _____		Engine Hours _____	
Found OK = <input checked="" type="checkbox"/>		Adjusted = <input checked="" type="checkbox"/>		Repairs Needed = <input type="checkbox"/>	
OK	NR	Coach Interior		OK	NR
		Steering Wheel Free Play			Stepwells, Defects
		Steering Wheel tilt			Floor Covering, Defects
		Brake & Accel. Pedal Operation			Loose or Missing Screws
		Oil, Volt, Temp Gauge Operation			First Aid Kit, Supplies & Secure
		Park Brake Operation			Bloodborne Pathogen Kit
		Shift Lever Operation			Fire Extinguisher Charged & Secure
		Wiper Switches & Operation			Reflective Triangle Kit
		Interior/Exterior Mirrors & Switches			Headlights, High & Low Beam Operation
		Headlights & Dimmer Switch			Turn, & Stop Lights & Lens
		Dome, & Stepwell Lights			Clearance Lights & Lens
		Dash Lighting & Dimmer Control			Back up Lights
		Turn Signal Lights & Operation			Wiper Arms & Blades
		Sun Visor			Compartment Doors, Hinges & Locks
		Front Door Operation			Glass (Check for Damage)
		Rear Door Operation			Door & Fender Rubber
		Panel Switches			Wheel Lugs & Nuts Torque: Initials:
		2-way Radio Operation			Wheels (Check for Rust & Damage)
		Panel Warning Lights			Tires (Check for Cuts & Damage)
		Hazard Switch & Lights			Air Intake Ducts / Vents
		Start / Stop Switch Operation			General Body & Paint
		HVAC Operation			Tire Inflation
		Driver Seat Operation			Record Tire Wear (Min 4/32 Front 2/32 Rear)
		Seat Belt Operation			LF RF LR RR _____
		Windows & Latches			Change oil and filter
		Stantions & Grab Rails			Differential level / leaks
		Seats, Frames & Covering			Wheel Seals (Check for Leaks)
		Seat Mounting Bolts Secure			Shocks (Leaks / Bushings)
		Batteries			Minimum Lining Thickness front _____ rear _____
		Terminals (Clean & Secure)			Brake System (Check for Proper Operation)
		Protective Coating on Terminals			Tie Rod / Drag link Ends
		Clean Battery Tops & Tray			Axle U-Bolts (Tight & Secure)
		Hold-Downs (Clean & Secure)			Fuel Tank (Secure / Leaks)
		Engine Compartment			Driveshaft / U-Joints
		Engine Compartment Lights			Radius Rods / Bushings
		Coolant Clamps (Tight / Secure)			Wiring / Connections (Tight & Secure)
		Fan Operation / Leaks			Coolant Clamps (Tight & Secure)
		Radiator (Clean / Leaks)			Coolant Lines (Check for Leaks)
		Fuel Lines/Filter			Exhaust System (Leaks / Secure)
		Belt Condition / Alignment			Grease Complete Chassis
		Wiring / Connections			
		Tire Tracker #			Differential Fluid
		L.F. _____	R.F. _____		Air Filter
		L.R. _____	R.R. _____		Transmission Filter
		L.R.I. _____	R.R.I. _____		Fuel Filter

Wheel Chair

Lift Inspection

		Cycle Lift, Lube All Connection Points, Check Fluid Level
		Hand rails for tightness or damage
		Hydraulic Hoses and Electrical Bundles

ROAD CALL REPORT

DATE: _____

TIME: _____

VEHICLE NUMBER: _____

BUS TRADED OUT: _____ YES _____ NO

MECHANIC: _____

OPERATOR: _____

REASON FOR ROAD CALL:

Mechanical Failure: _____

Other: _____

COMPLAINT/SYMPTOM: _____

WORK

PERFORMED: _____

REPAIR WORK

NEEDED: _____

REPAIR ORDER # _____ BY: _____

FOREMAN: _____

OPERATOR'S PADDLE for CHECKPOINT

	HATS	#2	#3	#4	Target	#6	#7	Main & 13th	#9	#10	#11	Safeway	#13	#14	#15	Wal-Mart	#17	#18	#19	HATS
Route #1	7:00 AM	P	S	S	7:10 AM	S	S	7:20 AM	S	S	S	7:30 AM	P	S	S	7:40 AM	S	S	P	7:55 AM
Route #2	8:00 AM	S	S	S	8:10 AM	S	S	8:20 AM	S	S	S	8:30 AM	S	S	S	8:40 AM	S	S	S	8:55 AM
Route #3	9:00 AM	S	S	S	9:10 AM	S	S	9:25 AM	S	S	S	9:40 AM	S	S	S	9:55 AM	S	S	S	10:05 AM
Route #4	10:10 AM	S	S	S	10:20 AM	S	S	10:35 AM	S	S	S	10:50 AM	S	S	S	11:05 AM	S	S	S	11:15 AM
Route #5	11:20 AM	S	S	S	11:30 AM	S	S	11:45 AM	S	S	S	12:00 PM	S	S	S	12:15 PM	S	S	S	12:25 PM
Route #6	12:30 PM	S	S	S	12:40 PM	S	S	12:55 PM	S	S	S	1:10 PM	S	S	S	1:25 PM	S	S	S	1:35 PM
Route #7	1:40 PM	S	S	S	1:50 PM	S	S	2:05 PM	S	S	S	2:20 PM	S	S	S	2:35 PM	S	S	S	2:45 PM
Route #8	2:50 PM	S	S	S	3:00 PM	S	S	3:15 PM	S	S	S	3:30 PM	S	S	S	3:45 PM	S	S	S	3:55 PM
Route #9	4:00 PM	S	S	S	4:10 PM	S	S	4:20 PM	S	S	S	4:30 PM	S	S	S	4:40 PM	S	S	S	4:55 PM
Route #10	5:00 PM	S	S	S	5:10 PM	S	S	5:20 PM	S	S	S	5:30 PM	P	S	S	5:40 PM	S	S	P	5:55 PM

S = STOP SERVED ON THIS ROUTE
P = PASS ON THIS ROUTE (no service)

OPERATOR'S PADDLE for CHECKPOINT (#2)

	HATS	#2	#3	#4	Target	#6	#7	Main & 13th	#9	#10	#11	Safeway	#13	#14	#15	Wal-Mart	#17	#18	#19	HATS
Route #1	7:00 AM	S	S	S	7:12 AM	S	S	7:25 AM	S	S	S	7:35 AM	S	S	S	7:50 AM	S	S	S	8:10 AM
Route #2	8:10 AM	S	S	S	8:22 AM	S	S	8:35 AM	S	S	S	8:45 AM	S	S	S	9:00 AM	S	S	S	9:20 AM
Route #3	9:20 AM	S	S	S	9:32 AM	S	S	9:45 AM	S	S	S	9:55 AM	S	S	S	10:10 AM	S	S	S	10:30 AM
Route #4	10:30 AM	S	S	S	10:42 AM	S	S	10:55 AM	S	S	S	11:05 AM	S	S	S	11:20 AM	S	S	S	11:40 AM
Route #5	11:40 AM	S	S	S	11:52 AM	S	S	12:05 AM	S	S	S	12:15 PM	S	S	S	12:30 PM	S	S	S	12:50 PM
BREAK	12:50 PM																			1:20 PM
Route #6	1:20 PM	S	S	S	1:32 PM	S	S	1:45 PM	S	S	S	1:55 PM	S	S	S	2:10 PM	S	S	S	2:30 PM
Route #7	2:30 PM	S	S	S	2:42 PM	S	S	2:55 PM	S	S	S	3:05 PM	S	S	S	3:20 PM	S	S	S	3:40 PM
Route #8	3:40 PM	S	S	S	3:52 PM	S	S	4:05 PM	S	S	S	4:20 PM	S	S	S	4:35 PM	S	S	S	4:55 PM
Route #9	4:55 PM	S	S	S	5:07 PM	S	S	5:20 PM	S	S	S	5:35 PM	S	S	S	5:50 PM	S	S	S	6:00 PM

S = STOP SERVED ON THIS ROUTE
P = PASS ON THIS ROUTE (no service)

Appendix E: Contracted service samples

Fare for a ride vs. Contract for Services

Fare:

General public transportation systems strive to recover a small percentage of their costs through passenger fares. Fares are typically set low to encourage public patronage and are usually subsidized through federal, state, and local funding. In general, fares are set to recover a specific portion of operating costs for general public transportation, dependent upon the level of other funding available for subsidization. The fare for a ride is usually one way from point A to B then another fare is collected for a return ride.

Contract for services:

A contract for services can be a significant source of income for a general public provider. The contract for services can be used by the general public provider as local match towards federal dollars. Contract for services provides transportation to other organization that may not have vehicles, and it is also a way for the general public provider and Health and Human Services to coordinate.

Currently HHS is purchasing bus passes at a given price through the general public provider. Some general public providers are giving a break on the price of bus pass. The counselors are calling and getting a monthly pass for the clients. General public providers (5311) that collect a fare from passengers can not use that money for local match to any Federal Transit Administration (FTA) grants.

Coordination through a “contract of services”:

HHS needs to meet with the general public provider and discuss a contract for services. The reasons for the wording of contract for services rather than bus pass or bus rides under FTA those are considered as fare box revenue. The contract for services would be on the fixed route system which is less expensive then the Para-transit service.

HHS would still be getting the transportation that is needed. The idea of the contract for services is that the general public provider would use the funds as local match to expand service area or possibly extend hours of service. It could also be used to coordinate with the local taxi for evening and weekend service. An agreement would need to be signed by the general public provider, and DPHHS.

Information to look at when considering a contract of services:

- Look at 2-3 years of what has been purchased for service from the general public provider
- The payment of services could be monthly or quarterly billed from the provider to HHS
- The contract of service could be tied to the client by assigned number

MEMORANDUM OF UNDERSTANDING

BETWEEN

MONTANA DEPARTMENT OF PUBLIC HEALTH AND HUMAN SERVICES

VOCATION REHABILITATION

AND

BUTTE SILVER BOW TRANSIT

This memorandum is effective July 1, 2012 through June 30, 2013 by and between the Butte Silver Bow Transit (BSBT) 155 West Granite Street, Butte, Montana 59701 and DPHHS Vocational Rehabilitation Butte (VRB) 700 Casey Street Suite #B Butte, Montana 59701.

BSBT and VRB agree to the following:

1. For the time period of July 1, 2012 through June 30, 2013, the BSBT will provide transportation services (fixed route) for VRB clients via monthly bus passes.
2. VRB will develop and provide a monthly bus pass which meets the requirements of BSBT, with a space available to stamp month and year on the back of the bus pass. An authorized signature from VRB validating the bus passes for the month issued. The passes will be numbered sequentially.
3. VRB in its discretion will issue the passes to eligible clients. VRB will hold all purchase orders for the month of bus passes issued. BSBT Manager will go to VRB office and sign all purchase orders on the first working Monday of the next month following the issued bus passes.
4. VRB will pay all purchase orders after BSBT Manager has signed by the 15th of the month.
5. Bus passes will be purchased at a reduced monthly fare of \$10.00. Reduced monthly passes can only be issued to those clients that are receiving benefits from VRB.

The parties have executed this Memorandum of Understand this _____ day of _____ 2012.

DPHHS Vocational Rehabilitation

BUTTE SILVER BOW TRANSIT

BY: _____
Regional Manager

BY: _____
General Manager

No.



**VOCATIONAL
REHABILITATION
TRANSPORTATION PASS**

**VOID IF DEFACED OR DOUBLE PUNCHED
PASS MUST BE SHOWN TO DRIVER**

The carrier of this card is entitled to ride all regularly scheduled bus routes in the community where it has been issued, during the validated time-period. This pass is non-redeemable. Vocational Rehabilitation and the local transit agency assume no responsibility for lost cards.

MONTH		YEAR
REGULAR	STUDENT	REDUCED

Appendix F: Comments and Changes from the Draft Report

Date: September 16, 2013
To: Steve Larson
From: Lisa Ballard
Re: Data assumptions and discrepancies

A number of comments on the draft report related to discrepancies in costs and ridership as well as differing use of fiscal years. The discrepancies resulted from imperfect data, where numbers don't match between the National Transit Database, the HATS reports to the City Council, HATS reports to MDT, and our calculations from the daily tallies of rides and miles. For consistency we have updated the report to show 2010 NTD data for comparing between systems, and 2012 data when examining HATS service. We have used our best judgment in choosing the following data values.

- Budget
 - \$976,488 for operating costs of weekday service as reported to the Montana Department of Transportation in quarterly reports for Section 5311 Rural General Public and Section 5316 Job Access and Reverse Commute. This corresponds to Checkpoint, Curb-to-Curb, and East Valley.
 - This is \$1,915 less than the operating budget for these three services shown in the City of Helena public transportation budget. We assume this is unreported expenses.
 - \$292,772 for operating costs of additional services based on the City budget
 - Capital expenses vary widely year-to-year. FY 2012 included \$190,000 for the new transit center.
 - \$976,488 is distributed between the daily services based on the cost allocation model. This uses reported mileage and estimated hours for each service.
- Ridership
 - We used HATS daily tallies totaling 85,550 for weekday services and 21,938 for additional services
 - The ridership from the FY 2012 Helena Area Transit Monthly Report reflects some errors caused by mistakes in spreadsheet formulas. (e.g., the formula misses the first or last day of the month sometimes).
 - Ridership reported to the state is about 8,000 higher than HATS tally sheets show. Causes are unknown.
- Mileage
 - We used HATS daily tallies totaling 174,957 rides for weekday service and assumed the difference of 57,807 miles reported to the state was for the trolley and Head Start.
- Hours
 - We estimated hours based on 11 hours per day for checkpoint, 33 hours per day for curb to curb, and 8 hours a day for East Valley.

For peer comparison, despite these discrepancies, all data sets show that Helena is providing less rides per mile and per hour than the two Montana communities with the most similar service area and population characteristics (Bozeman and Butte). For consistency we have updated the report to show 2010 NTD data for comparing between systems, and 2012 data from City of Helena when examining HATS service. We have also added footnotes describing discrepancies.

Comparison of Data Sources

2012 City Budget & Ridership							
Budget		Ridership		Cost per Ride (2)			
Operating (1)	Capital	Total	Helena Area Transit Monthly Report	Pivot Table from Daily Tally	Monthly Report	Pivot Table	
Miles							
Weekday Services							
Helena Bus	\$889,752	\$189,798	\$1,079,550	66,204	66,373	\$13.41	133,421
Checkpoint					34,272		
Curb to Curb					32,101		
East Valley	\$218,651		\$218,651	19,480	19,177	\$11.22	41,536
Subtotal	\$1,108,403	\$189,798	\$1,298,201	85,684	85,550	\$12.94	174,957
Additional Services							
Trolley					2,040	\$0.00	2,244
RMDC	\$0		\$0	7,006	6,291	\$0.00	N/D
Head Start	\$76,485		\$76,485	13,607	13,607	\$5.62	N/D
Intercity	\$86,287		\$86,287	N/A	N/A	N/A	N/A
Subtotal	\$162,772	\$0	\$162,772	20,613	21,938	\$3.71	2,244
Total	\$1,271,175	\$189,798	\$1,460,973	106,297	107,488	\$11.15	177,201
				diff			(1,191)

1 City budget includes \$130,000 of RMDC costs in East Valley account instead of separating.

2 Cost per ride calculated from City budget is based on operating budget excluding intercity

4 Difference between City budget and reported to MDT after removing Head Start / intercity:

5 In draft report the cost per ride and pass-mi were based on the value reported to MDT. For final, these values change significantly when calculated from ass.

HATS Active "Departments" per City of Helena Budget

ID	Description
3160	Helena Bus
3162	East Valley
3164	Head Start
3165	Rimrock Stage

Budget does not have a separate category for RMDC. These revenue and expenses are grouped with East Valley.

Comparison of Data Sources

	Reported to MDT/FTA													
	Operating Expenses (3), (4)				Ridership (6)				Cost per Ride		Mileage			
	\$5311 Rural General Public	\$5316 JARC	\$5317 New Freedoms (2)	\$5311(f) Rural Intercity	Not Reported	Total	\$5311 Rural General Public	\$5316 JARC	\$5317 New Freedoms	Total	\$5311 Rural General Public	\$5316 JARC	\$5317 New Freedoms	Total
Weekday Services														
Helena Bus						66,275					188,622			188,622
Checkpoint Curb to Curb East Valley						-					-			-
Subtotal	\$879,183	\$97,305	\$0	\$0	\$0	\$976,488	66,275	-	66,275	-	188,622	44,142	44,142	232,764
Additional Services														
Trolley					\$0									
RMDC			\$130,000		\$130,000									
Head Start				\$76,485	\$76,485									
Intercity				\$86,287	\$86,287									
Subtotal	\$0	\$0	\$130,000	\$86,287	\$76,485	\$292,772	24,825	-	24,825	-	N/A	N/A	N/A	N/A
Total	\$879,183	\$97,305	\$130,000	\$86,287	\$76,485	\$1,269,260	91,100	24,379	N/D	115,479	\$11.19	\$4.39	N/D	232,764
					diff (4)	\$1,915			diff	(7,991)			diff	(55,563)

- 3 MDT 5311/5316/5317 operating budget does not include expenses for Head Start and Intercity
- 4 This study only reviewed 5311 and 5316 quarterly reports. 5317, 5311(f), and unreported data are assumed based on city budget. \$1,915
- 5 Difference between City budget and reported to MDT, accommodating for New Freedoms, Head Start, Intercity.
- 6 Ridership from 5311 and 5316 reports only. We did not review 5317. No ridership is reported from HATS for intercity. imptions shown here.

FTA Grant Programs

Section	Grant Title	HATS Services	In Rides, Miles, Not in Expenses
\$5311	Grants for Other than Urbanized Areas	Checkpoint, Curb-to-Curb	Trolley, Head Start, RMDC
\$5316	Job Access and Reverse Commute Program	East Valley	
\$5317	New Freedom Program	RMDC	No Data
\$5311(f)	Intercity Bus Program	Intercity ticket agent (Rimrock)	N/A - Ridership tracked by bus operator

HATS reported expenses for Checkpoint, Curb-to-curb, and East Valley only. HATS reported all ridership and mileage.

Comparison of Data Sources

	Calculated		Used in this Report									
	Operating Expenses	Mileage	Expenses		Ridership	Miles	Cost per Ride (5)	Hours	Cost per Hour	Assumed Trip Length (Mi)	Passenger Miles	Cost per Pass-Mi (7)
	Per Cost Allocation	Checkpoint	Operating	Capital	Total							
Weekday Services												
Helena Bus	\$802,326	15 mi * 11 hrs * 256 days	\$802,326	\$189,798	\$992,124	66,373	133,421	\$12.09	11,440	\$70	212,394	\$3.78
Checkpoint	\$215,542	42,240	\$215,542		\$215,542	34,272	42,240	\$6.29	2,860	\$75	109,670	\$1.97
Curb to Curb	\$586,785		\$586,785		\$586,785	32,101	91,181	\$18.28	8,580	\$68	102,723	\$5.71
East Valley	\$174,162		\$174,162		\$174,162	19,177	41,536	\$9.08	2,064	\$84	120,815	\$1.44
Subtotal	\$976,488		\$976,488	\$189,798	\$1,166,286	85,550	174,957	\$11.41	13,504	\$72	333,209	\$2.93
Additional Services												
Trolley						2,040	2,244					
RMDC	N/A		\$130,000		\$130,000	6,291						
Head Start	N/A		\$76,485		\$76,485	13,607	55,563					
Intercity	N/A		\$86,287		\$86,287							
Subtotal	\$0		\$292,772	\$0	\$292,772	21,938	57,807					
Total			\$1,269,260	\$189,798	\$1,459,058	107,488	232,764					

7 In draft, report the cost per ride and pass-mi were based on the value reported to MDT. For final, these values change significantly when calculated from assumptions shown here.