Flexible Transit Outreach Guidebook

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Paradigm Planning believes that their model of prioritizing public involvement, communication, and education could serve as a useful case study or guide for a transit agencies looking to implement flexible transit service locally. There is a great deal of information on flexible transit, yet few examples of how to engage the community on flexible transit issues. This document is a guide for educating and soliciting feedback from a community on flexible transit.

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Capturing the Ride was an exploration of flexible transportation options for low-density communities in Salem and Keizer, Oregon. The current transit system (Cherriots) does not serve Keizer, South Salem, and West Salem well; each of these communities has areas with limited or no access to current bus routes. The project provided flexible transit recommendations for those three study areas for services that would better meet the communities' transit needs.

Over a five-month period, Paradigm Planning conducted extensive research and community engagement in Keizer, South Salem, and West Salem to determine what kind of flexible transit might work and whether the communities would be receptive to using this service.

For more information on Capturing the Ride, see Paradigm Planning’s SALEM-KEIZER TRANSIT FLEXIBLE SERVICE PLAN.
Flexible transit can be implemented for a wide range of purposes, including providing the only means of transportation in a rural area, expanding coverage along current routes, providing a feeder service to fixed-route transit, and replacing an existing paratransit service. Before beginning the outreach process, transit agencies should explicitly define their purpose and goals for implementing flexible transit. Additionally, agencies should also define who they are trying to serve with flexible transit (e.g. people with disabilities, transit-dependent individuals, and/or existing riders). This will help agencies identify key populations that need to be reached in the community engagement process.

**Things to Consider**

Paradigm Planning took every possible opportunity to connect with the community and receive their input on the current transit system and the potential for flexible transit. Getting feedback from the community should happen continuously through flexible transit service development. A huge component of this is communicating effectively with the public. Flexible transit is a complex concept, so engaging the community during the Capturing the Ride project hinged largely upon Paradigm Planning’s ability to communicate these concepts and explain trade-offs to the community. When Paradigm Planning was able to interact face-to-face with community members to explain flexible transit and trade-offs between alternative systems, the rich level of feedback indicated that the community both understood and could use the language of flexible transit.

**Collecting Community Values**
A crucial component of teaching flexible transit to the public is communicating transit concepts while avoiding jargon that may be hard to understand. When talking to Salem-Keizer Transit staff, words such as fixed-route service, headway, and activated stop could be used without providing a definition. However, when trying to teach flexible transit to the public, it is important to use terms with which the public is familiar. Earlier on in the Capturing the Ride public involvement process, Paradigm Planning made a concerted effort to use terms like ‘regular bus service’ instead of ‘fixed-route service’ and talked about how often the bus came rather than its headway. However, some terms were hard to find a synonym for and simply needed to be explained so that they could become a part of the public’s vocabulary. During the Capturing the Ride project, the public picked up terms and concepts quickly and were able to express their values and opinions using the language of flexible transit. The table below lists the terms Paradigm Planning believed should be defined for the general public.

<table>
<thead>
<tr>
<th>Term</th>
<th>Synonym for Public</th>
<th>Definition Used for Public Involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arterial</td>
<td>Main Street</td>
<td>Described as a main busy street.</td>
</tr>
<tr>
<td>Flexible Transit</td>
<td>Flexible Bus Service</td>
<td>Described as a transit service with elements of both regular bus service and dial-a-ride.</td>
</tr>
<tr>
<td>Headway</td>
<td>Frequency of Bus</td>
<td>Described as how often the bus comes or frequency.</td>
</tr>
<tr>
<td>Activated Stop</td>
<td>Call-In Stop; Activated Stop</td>
<td>Described as a stop that can be turned on by contacting the transit call center.</td>
</tr>
<tr>
<td>Dial-A-Ride</td>
<td>Paratransit</td>
<td>Described as a service that will pick you up from and drop you off at any location, like a shared taxi. Useful to make reference to the community’s most familiar paratransit system.</td>
</tr>
<tr>
<td>Point Deviation or Demand-Responsive Connector</td>
<td>The Hopper</td>
<td>Described as a flexible transit option that is closer to dial-a-ride (see page 8).</td>
</tr>
<tr>
<td>Deviated Fixed Route, Route Deviation, Request Stops, Flexible-Route Segments, Zone Route</td>
<td>The Deviator</td>
<td>Described as a flexible transit option that is closer to regular bus service than dial-a-ride (see page 8).</td>
</tr>
<tr>
<td>Fixed-Route Service</td>
<td>Regular Bus Service</td>
<td>Described as a regular bus service with regular stops and regularly-schedule times. Useful to make reference to the community’s most familiar fixed-route system.</td>
</tr>
</tbody>
</table>
Flexible Transit Transit Cooperative Research Program (TCRP) Synthesis 53 lists six different flexible transit types (Figure 1). This list formed a solid foundation of knowledge regarding the different options for flexible transit. It was clear that while the TCRP flexible transit types would be useful as concepts, the terms used would not be easily understood by the public.

Figure 1. TCRP Synthesis 53 Flexible Service Types

- **Route Deviation**
- **Point Deviation**
- **Demand-Responsive Connector**
- **Request Stops**
- **Flexible-Route Segments**
- **Zone Route**

**TABLE 2**

<table>
<thead>
<tr>
<th>Type of Flexible Service</th>
<th>No. of Transit Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route deviation</td>
<td>12</td>
</tr>
<tr>
<td>Point deviation</td>
<td>3</td>
</tr>
<tr>
<td>Demand-responsive connector</td>
<td>6</td>
</tr>
<tr>
<td>Request stops</td>
<td>4</td>
</tr>
<tr>
<td>Flexible route segments</td>
<td>2</td>
</tr>
<tr>
<td>Zone route</td>
<td>1</td>
</tr>
<tr>
<td>Total transit systems</td>
<td>24</td>
</tr>
<tr>
<td>Total service types</td>
<td>28</td>
</tr>
</tbody>
</table>

*FIGURE 1* TCRP Synthesis 53 Flexible Service Types.

*TABLE 2* TRANSIT SYSTEMS USING EACH TYPE OF FLEXIBLE SERVICE.
In order to make the flexible transit types more accessible to the public, Paradigm Planning changed the graphics of the flexible transit types (Figure 2). However, the concepts still seemed overly complex and difficult to distinguish from one another. In order to facilitate teaching the concept of flexible transit to the public and provide clear trade-offs between types of service, Paradigm Planning distilled TCRP Synthesis 53’s six flexible transit types into two: the Deviator and the Hopper.

Figure 2. Flexible Transit Types Redrawn
Paradigm Planning designed the Deviator and the Hopper to help the public understand the main trade-offs between different flexible transit types. Using these two distilled concepts made flexible transit much easier to teach. The names ‘Deviator’ and ‘Hopper’ were chosen because they seemed the most descriptive of what the service would do, which played into teaching each of the concepts (e.g. the bus would deviate off its regular route to pick up riders). During the Capturing the Ride project, members of the public were very receptive to these teaching concepts and used the terminology taught to them (Deviator, Hopper, activated stop, etc.).

Figure 3. The Deviator and The Hopper

The Deviator

The Deviator is a form of flexible transit that is the most like fixed-route service. The bus has a predetermined route and scheduled stops much like a regular bus. The biggest difference is that it will go off of its regular route when requested to pick people up and drop people off. The bus can deviate anywhere within the designated service area. Contacting a call center would be required to request a deviation. Riders can request drop-off destinations ahead of time or when they are on the bus. The “Call-In Stop” markers in the diagram represent homes or designated collection points where people have requested a deviation. After a deviation to pick up or drop off a rider, the bus will return to its normal route. A deviator would always pick up and drop off at regular bus stops.

The Hopper

The Hopper is a form of flexible transit that is more like dial-a-ride service. The Hopper also has a zone of pickups and drop-offs much like the Deviator, except, in this case there is no regular bus route. The Hopper “hops” around the zone, picking people up from their homes or designated bus stops that can be activated. The service can be used to travel anywhere within the zone, usually including a transfer point that connects to regular bus service leading outside of the zone. Reservations may need more advanced notice than the Deviator due to the greater flexibility of the route. Requests to be dropped off may be made ahead of time or once on the bus. The fixed stops along the Hopper’s route are placed at primary destination points where the Hopper travels to during each run where riders can get on and off without reservations.
An important part of teaching flexible transit service is relating it back to the transit service people already know and understand. Paradigm Planning found it useful to present flexible transit as existing on a spectrum from fixed-route transit to dial-a-ride service (Figure 4). This poster included pictures of the local fixed-route and dial-a-ride services to help the public relate to these concepts. The Deviator and the Hopper were also placed on this spectrum in order to present some of the differences between these types of flexible transit.

Figure 4. *Capturing the Ride* Flexible Transit Spectrum Poster

**Regular Bus**
Cherriots is the good old-fashion bus service that everyone is familiar with. The bus follows the same route and makes the same stops each day. If you want to ride the bus, you can show up at the nearest stop and expect it to arrive at a scheduled time.

**The Deviator**
The Deviator is the most like regular bus service. The bus goes on the same route and makes similar stops. The biggest difference is that it will go off of the normal street when needed or requested to pick people up and drop people off.

**The Hopper**
The Hopper is less like a regular bus and more like dial-a-ride service (a shared taxi). There are fewer regular bus stops for jumping on and off, but the bus can go anywhere in the neighborhood or any defined area with some kind of notice.

**Dial-a-Ride**
Not as well known because it’s restricted to seniors and people with disabilities. CherryLift buses are a lot like shared taxis, in that they will pick you up (and anyone else along the way) and take you anywhere you want to go in Salem or Keizer. There are no bus stops or schedules, instead you have to call in advance to make reservations.
In order to discuss the trade-offs between the Deviator and the Hopper with the public, Paradigm Planning used the different characteristics of flexible service, as described in TCRP Synthesis 53, to elaborate on how the bus service would function. As shown below, these characteristics were put on a spectrum to illustrate the flexibility of each service. The leftmost side of the spectrum aligns with fixed-route transit characteristics and the rightmost side aligns with dial-a-ride characteristics. These spectrums were a useful tool for discussing trade-offs between aspects of flexible transit. For example, curb-to-curb service would require smaller vehicles, a wider wait window, and would likely cost more. These are important discussions to have with the community in order to ascertain their values regarding transit.

Figure 5. Flexible Transit Characteristics
Paradigm Planning used case studies to help inform the creation of flexible transit options and to provide examples of flexible transit during public outreach. The utilization of case studies for explaining flexible transit was useful during the Capturing the Ride workshops. As Paradigm Planning team members explained the Deviator and the Hopper, they were able to draw on examples from transit agencies across the United States and Canada. The case studies were informative in providing examples and lessons learned regarding operating flexible transit. Additionally, they provided legitimacy to the concepts by showing that these services had been successfully tried and implemented elsewhere in the United States.

Figure 6. Capturing the Ride: The Deviator Case Study Poster

The Deviator
The Deviator is the most like regular bus service. The bus goes on the same route and makes similar stops. The biggest difference is that it will go off of the normal street when needed or requested to pick people up and drop people off.

St. Joseph, Missouri
The Ride
- Bus has regularly placed stops on the route for people to ride normally
- Bus can go anywhere off the regular route up to three-quarters of a mile for people
- People can make off-route requests the same day if the bus schedule allows for an extra 50 cents

Woodbridge, Virginia
The Deviator
- Bus has regularly placed stops on the route for people to ride normally
- There are other on-demand bus stops spread out nearby that can be activated without reservations
- Bus can also go anywhere off the route up to three-quarters of a mile if people reserve a day or more in advance

Burnsville, Minnesota
The Hopper
- Bus has fewer normal bus stops on the route for people to ride normally
- There are also more activated stops on the route where people flag down bus (no reservations)
- Deviations are only provided during non-rush hour parts of the day

Things to Think About
- Would you be willing to pay a little more if the bus came closer/directly to you?
- Would this work for the kind of trips you need to make (to work, school, the grocery store, etc.)?
- Would you be willing to walk to a collection point the Deviator could more easily access?
- Would you prefer the bus to deviate further for pick-ups and drop-offs if it meant that it might make your trip a little longer?
Paradigm Planning’s first effort to teach the community about flexible transit occurred at their workshops. These workshops were held in a place that was located in the study area and was easy for the public to access by transit. Attendees were asked to participate in a dot exercise in which they placed dots on a map indicating the start and end points for their most common trips. Next was an introduction board that displayed the flexible transit spectrum where a member of Paradigm Planning would explain the purpose of the Capturing the Ride project and describe the concept of transit.

Participants learned about the two types of flexible transit, the Deviator and the Hopper, at separate workshop stations. At these stations, Paradigm Planning used maps and tracing paper (shown below) to demonstrate the ways in which different services could work and to explain different elements of flexible transit (e.g. activated stops, flexible transit zone, and time points). Participants were encouraged to ask questions during the teaching process. When the workshop was over, attendees were asked to fill out surveys regarding which type of flexible transit they preferred and what elements of flexible transit were the most important to them.

Figure 7. Capturing the Ride’s Workshop Table Maps
The development of the alternative flexible transit options for a study area in the Capturing the Ride project required drawing on existing conditions, best practices, and community feedback simultaneously. Existing conditions provided information regarding the location of inefficient fixed routes, the location of potentially transit-dependent populations, and the location of popular destinations in the study area. Figure 7 (previous page) shows the dot maps from the Capturing the Ride workshops with major trip start and end points labeled.

Paradigm Planning turned to the preferences and values of the community to guide what type of flexible transit was offered. In the case of Capturing the Ride, the community did not want a fare increase and would rather walk to an activated stop and make transfers. At this point, there was still a range of options with clear trade-offs between the three alternatives with which each study area was presented. For example, Figure 8 below shows one of the flexible transit alternatives we created, which provides a lot of coverage for the study area. The alternatives also reflected the community values of higher frequency service, which inherently leads to less coverage.

Figure 8. Capturing the Ride’s Alternatives Development Process
It was important as Paradigm Planning got further into the details of what the actual flexible transit service might look like on the ground, not to lose sight of what the community wanted from their transit system. Once the alternatives were developed, they were presented to the community at the Capturing the Ride Open House. During the Open House attendees were first reintroduced to the Capturing the Ride project and provided basic information regarding flexible transit. It was important to provide an opportunity to learn about the basics of flexible transit at each outreach event, since it was likely that some of the attendees had not participated in earlier outreach events. Participants were then able to browse through the flexible transit alternatives for each study area and had the opportunity to speak with Paradigm Planning about the trade-offs between each of the alternatives.

Finally, participants were asked to fill out a brief comment card and offer their feedback on the alternatives presented. This event provided a final opportunity for the community to express their preferences before the final recommendations for each study area were created. In some cases the final recommendation was a hybrid of several alternatives presented at the Open House that the community was evenly split over. Bringing the flexible transit options back to the community a final time allowed Paradigm Planning to provide recommendations that were more closely aligned with their preferences and values.

Paradigm Planning believes that this model of prioritizing public involvement, communication, and education was successful and could serve as a useful case study or guide for transit agencies looking to implement flexible transit service locally. If you have questions on Paradigm’s process or would like more information or clarification on anything discussed in this guidebook, please contact Paradigm at info@capturingtheride.com.