

CREATING AND CAPTURING VALUE IN MASS TRANSIT

A Best Practices Workshop



Summary Report
Prepared by Center for Neighborhood Technology



ACKNOWLEDGEMENTS

On July 9th and 10th, 2008, national transportation experts gathered in Chicago to help move the Chicago region's transit agencies forward in meeting the needs of transit riders and to advance the goals of the recently passed transit reform legislation. This Best Practices Strategic Planning Session was held at the Chicago Transit Authority (CTA) headquarters; it was co-sponsored by the Regional Transportation Authority (RTA).

CNT would like to thank the national experts and best practitioners who provided input and recommendations for each objective. The session was attended by key Chicago leaders and innovators, as well as transit agency staff. Thanks to the following experts who gave presentations at the workshop: Frank Beal-President, Metropolis 2020; Gerard Bridi-President, Accor Services USA; Tom Bulger-President, GRI; Sarah Campbell-Washington, D.C. Planning Department; Anne Canby-President, Surface Transportation Policy Partnership; Tom Downs-Chairman of the North American Board of Veolia Transportation; Sharon Feigon-CEO, I-GO Car Sharing; Travis Fox-Manager, Performance Monitoring and Customer Services, San Francisco Municipal Transportation Agency; Grace Gallucci-Deputy Executive Director of Research, Analysis and Policy Development, Regional Transportation Administration; Ron Huberman-President, Chicago Transit Authority; Paul Karas-Principal, CRA International; Roy Kienitz-Deputy Chief of Staff, State of Pennsylvania; Clayton Lane-Deputy Executive Director, Philly Car Share; Shelly Poticha-President, Reconnecting America; Steve Schlickman-Executive Director, Regional Transit Authority; and Bob Whitson-Director, Boulder East.

Special thanks also to CNT staff who contributed to and put this report together: Scott Bernstein, Maria Choca-Urban, Will Glassberg, Jacky Grimshaw, Olympia Moy, Kathrine Nichols, David Schaengold and Annette Stahelin.

CNT would like to thank The Lloyd A. Fry Foundation, Regional Transit Authority, and The Searle Funds at The Chicago Community Trust for their support in this important work.

About the Center for Neighborhood Technology

The Center for Neighborhood Technology (CNT) was founded in 1978 to research, adapt and test new community revitalization strategies relevant to urban communities, especially strategies that harnessed the environmental and economic value of the more efficient use of natural resources. Over the years, CNT has worked to disclose the hidden assets of the Chicagoland economy and urban areas more broadly; demonstrate the multi-bottom line benefits of more resource-efficient policies and practices; and show how the value of what we demonstrated could be captured to benefit communities and their residents inclusively. CNT's work, especially in the areas of energy, transportation, materials conservation and housing preservation, helped fuel a generation of community development institutions and learning, garnering us a reputation as an economic innovator and leader in the field of creative sustainable development.

CNT has created and developed a number of projects and affiliate organizations which help fulfill its mission: to promote the development of more livable and sustainable urban communities. CNT's transportation work is focused on using transportation assets to serve both the environmental and economic development goals of regions and communities. CNT works to boost demand for clean, efficient and affordable mass transit; increase the supply of traditional and non-traditional mass transit services; disclose the linkages between transportation costs and housing affordability; create model value-capture mechanisms that take advantage of the intersection of efficient transportation networks with community economic development programs; and promote policy initiatives that increase public participation in investment decisions and make more resources available for sustainable investments.

More information about CNT is available at www.cnt.org.

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INTRODUCTION

In July of 2008 the Center for Neighborhood Technology collaborated with the Regional Transit Authority and the local service boards to bring experts from all over the country to Chicago to discuss best practices in *Creating and Capturing Value in Mass Transit*. The workshop presented an opportunity for both practitioners and advocates to come together to learn about innovations in transit occurring elsewhere in the United States, and constructively discuss what Chicago-area transit providers and planners could do to improve the economic sustainability of their system.

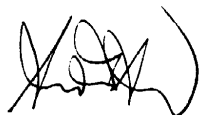
The Chicago area grew in direct correlation with the railroads, and its current wealth of transit options reflects that history. We want this region to embrace that transit heritage, and recognize the financial advantages to both its individual citizens and its overall economy of maintaining a healthy and robust transit system. A commitment to moving forward and ensuring that Chicago continues to receive recognition as both a national transit hub and transit-friendly city will help secure the region's economic stability.

Ultimately, the goal of the workshop was to produce tangible results and innovative ideas that could help create a culture of appreciation for mass transit and move it beyond constantly competing with highways for limited financing. The current economic climate has thrown into sharp relief the precariousness of the current financing strategies for mass transit; all over the country transit providers are faced by dwindling financial support from both the federal and local level. The discussion pushed aside the constraints of current policies and perceptions, and instead focused on what changes could be implemented in the near future in order to effect substantial and lasting change. The assembled experts provided a wealth of success stories and local practitioners participated zealously in suggesting how to adapt the innovations to serve the Chicago area. The eager participation from all sides highlighted the great potential within the existing Chicago transit system. In order for the Chicago area to flourish, however, local practitioners must continue to dedicate themselves to not only studying and proposing ideas for improving the current system, but also to moving forward with those innovative and inspiring proposals to create concrete transit legacies.

The sponsors greatly appreciate the time and effort that presenters and attendees committed to making the workshop successful. We also want to thank our generous supporters, The Lloyd A. Fry Foundation, Regional Transit Authority, and The Searle Funds at The Chicago Community Trust, for making the workshop possible. The ideas presented and developed in this workshop will help shape decisions as we all work towards a better transit system for the Chicago region.

CNT looks forward to your continued support and collaboration.

Sincerely,



Scott Bernstein
President, Center for Neighborhood Technology

CREATING AND CAPTURING VALUE IN MASS TRANSIT

When the Illinois General Assembly passed P.A. 95-0708 in January 2008, it created an opportunity to improve Chicago's transit system by mandating greater accountability on the part of the Regional Transportation Authority (RTA) and its service boards, the Chicago Transit Authority (CTA), Metra and PACE, and by authorizing the first new funding for transit in a quarter century. Seeking to capitalize on these reforms, the Center for Neighborhood Technology (CNT), in partnership with the RTA and the CTA, co-sponsored a best practices workshop that brought together experts from around the country to identify strategic and operating innovations of lasting value, measurable outcomes and, where possible, flag short-term opportunities to immediately improve transit practices in the region.

Summary

The discussions at the workshop addressed the elements of the strategic plan mandated in P.A. 95-0708, including how to market transit successfully, how to finance improvements to the transit system by leveraging the economic value that would be created by the improvements, how to create and capture the economic value of the system through transit-oriented development, and how to best use performance measures to evaluate the progress of the system and leverage new management initiatives at the service boards and the RTA. The workshop accomplished three broad goals:

Reframed the debate: Presenters redefined the issue to focus on quality transportation services and transit's contribution to economic well-being and climate protection, i.e. the additional, hidden benefits of investment in transit. Such a reframing can move the region beyond the political formulas that have resulted in public policy gridlock.

Highlighted successful examples in other locales: Presenters recounted their experiences implementing innovative policies and practices to effectively develop transit resources elsewhere in the country so that participants could consider how they might adapt them to the Chicago region's transit needs.

Presented economic and environmental benchmarks: Lastly, the RTA had the opportunity to learn about the performance benchmarks of other jurisdictions and discuss the importance of a reliable, convenient and safe transit system to economic viability and environmental goals, such as reducing greenhouse gas emissions.

WORKSHOP REVIEW: DAY I

Ron Huberman, President of the Chicago Transit Authority, opened the workshop with an introduction that outlined the challenges and opportunities facing a 21st Century transit provider. His presentation highlighted how a confluence of factors, from rising fuel prices and climate change to a difficult housing market, has produced an increase in mass transit ridership. In their presentations TJ Ross, the Executive Director of PACE, and Tom Downs, Chairman of the North American Board of Veolia Transportation, also highlighted the need for a fundamental shift in how transit systems are run in order to truly capitalize on the increased demand for transportation. Downs specifically addressed the need to understand the increase in ridership as a permanent, rather than temporary, trend. He cited decreased truck and SUV sales, the emergence of China and India as car buying and manufacturing countries, and the spike of home sales that are marketed as accessible to transit as evidence for that claim. Downs also emphasized the need for recognizing that pedestrian networks are the lifeblood of transit.

*Having clearly established the need for a new *modus operandi* in the region for transit, the session progressed to presentations by experts and practitioners that addressed the most recent innovations in **marketing, financing, transit-oriented development, and performance measures**. The presentations helped frame the workshop around progress and change for the region.*

Presentations: **Marketing** Best Practices

Transit providers confront a century of cultural and political preferences for automobiles. Their task is, therefore, Herculean, but not unattainable. An effective marketing strategy is an integral part of a successful transit system. In order to get people out of their cars and into transit, it is vitally important to make car drivers aware of their transit options. The presentations highlighted some of the most effective transit marketing campaigns and strategies in the country. Bob Whitson, Executive Director of Boulder East, spoke about the successful implementation of the **Eco-Pass system**, a year-long transit pass that has effectively lured choice riders to the local transit system in Boulder. The Eco-Pass is attractive to businesses that want to promote environmental standards and has also been bought in bulk by several communities who want to encourage transit ridership among their residents. Gerard Bridi, President of ACCOR Services, and Tom Bulger, President of GRI, encouraged using **pre-tax employer transit passes** as a way to boost transit ridership and increase the number of employers participating in transit programs for their employees. Sharon Feigon, CEO of I-GO Car-sharing, and Clayton Lane, Deputy Executive Director of PhillyCarShare, added to those ideas the potential for developing a system of **united fare media that would incorporate the use of car sharing** in the development of a transit marketing campaign that emphasizes the convenience and economic advantage provided by an effective transit system paired with a car sharing network.



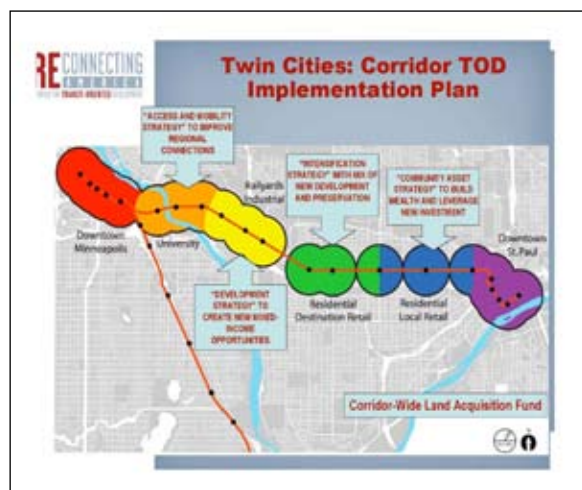
Presentation from Sharon Feigon, CEO of I-GO Car Sharing, illustrated different types of fare media.

Presentations: **Financing** Best Practices

Transit systems in the United States do not pay for themselves entirely through farebox receipts; even the most adept transit operators in the United States can only recoup about 60% of their expenses through the farebox. In the Chicago region the average recovery rate for the service boards hovers around 50%. Strategies that help secure funding from other sources, therefore, are extremely important. The presentations about innovative financing strategies primarily focused on government structures; Roy Kienitz, Deputy Chief of Staff to Pennsylvania Governor Ed Rendell, explained the current struggle to initiate [tollway lease-buybacks](#) in Pennsylvania and use a percentage of the money to fund transit, while Anne Canby, President of STPP, discussed [restructuring the allocation of federal funds](#) to give MPOs more control over regional planning and funding decisions, in an effort to more equitably distribute funding between highways and transit. The discussion also included input from the business community. Frank Beal, Executive Director of Chicago Metropolis 2020, explained that [businesses recognize the importance of investing in a quality transit system](#) for the region, and highlighted their eagerness to participate in non-traditional and cross-topic partnerships. He emphasized that a high-functioning transit system is important for the economic health of the region.

Presentations: **Transit-Oriented Development** Best Practices

Shelley Poticha, President of Reconnecting America, spoke about the design of transit stations, emphasizing, in particular, the need to think creatively and effect positive change beyond the immediate station environment by [adopting a strategic regional plan that includes explicit expectations for TOD](#) throughout the region. Paul Karas, Principal at CRA International, further stressed the necessity of [taking a regional view of the transit and development connection](#). Transit-Oriented Development requires a holistic approach that includes specific guidelines to address affordability, access, mixed-uses, and sustainability and works within a planned vision for the larger region; if the surrounding area is not included in the plan then the development trends toward exclusivity. Scott Bernstein, President of CNT, concluded the panel with a presentation that shifted attention to [rallying political and institutional support](#) for Transit-Oriented Development. Location efficiency, a measure of a location's proximity to vital resources, makes financial sense to both business and home owners who should be utilized as a valuable political base. The most recent "Emerging Trends in Real Estate," a publication of PriceWaterhouseCooper and the Urban Land Institute, underscores the willingness of the business community to invest in areas that exhibit location efficiency. The Chicago metropolitan area has the opportunity to capitalize on the growing interest in location efficiency, but to do so it must develop a [comprehensive plan that addresses the current congestion within the region](#).



Presentation from Shelley Poticha, President of Reconnecting America, showed the Corridor TOD Implementation Plan for the Twin Cities.

Presentations: **Performance Measures** Best Practices

The final panel discussed Performance Measures that can be used to inform transportation planning and operation decisions. Grace Galluci, Deputy Executive Director of Research, Analysis and Policy Development at RTA, provided a baseline understanding of the RTA's current performance measures, which can be broken into three levels of focus: regional, sub-regional, and mode specific. The RTA measures five distinct areas: service coverage, efficiency and effectiveness, service delivery, maintenance and capital investment, and service level solvency. Travis Fox, Manager, Performance Monitoring and Customer Services for San Francisco Municipal Transit Agency, spoke about his work instituting [performance measures that help drive management decisions](#), as opposed to the classic way that used them to placate voter angst. Lastly, Sarah Campbell, from the Washington D.C. Planning Department, spoke about the need to [identify the 'who' of transit use](#). The most important use of performance measures is to improve the service for the users, and in order to do that the service board must have a clear understanding of whom it is serving.



Travis Fox, Manager, Performance Monitoring and Customer Services for San Francisco Municipal Transit Agency, gave a presentation on creating and using performance measures to drive continuous improvement.

WORKSHOP REVIEW: DAY II

Steve Schlickman opened the second day of the workshop with a brief presentation that explained the RTA's position in the future of transit in Chicago. He highlighted the difficulty in navigating the bureaucracy that can stifle efforts to effect change in regional transit policies, but was hopeful that the state legislature's insistence on a strategic plan to guide the service boards' capital investment projects will give the RTA more authority in the Chicagoland region. Until the passage of P.A. 95-0708, no entity in the region had the power to develop and implement plans across transit modes, resulting in poor coordination throughout the region. Bulger expressed interest in using the ideas of the assembled experts, and appreciated the fresh perspective they could offer.

A general discussion surrounding the presentations from the first day ensued. The most frequently raised question concerned the ability of transit providers to recruit and retain riders from new demographic segments. One goal for providers is to increase the convenience of using mass transit for potential riders; several methods for reaching that goal were suggested: car-sharing, integrating car-sharing with the network, simplifying fare media, and the use of Special Service Area's to create neighborhood passes. The ascendancy of land values in TOD's was raised as an impediment to providing affordable housing and ensuring access to transit to all communities. Tom Bulger, however, noted that the opportunity exists to steer the market toward providing the necessary housing stock by streamlining the regulatory process for TOD. This could both boost ridership and be the start of a partnership between transit providers, developers, and residents that would enhance the grassroots base of support for transit.

Grassroots support for mass transit does not necessarily translate into increased funding for vital mass transit projects. Political buy-in is necessary and predicated upon transit plans that are both fiscally and politically attainable. Campaigns that achieve broad support, Anne Canby noted, are those plans that focus on outcomes rather than the plan. In order for a plan to succeed, politicians and people alike need to understand and support the desired results; they do not worry about the political process but rather the end product. Proposed transportation projects, therefore, must fulfill the needs of the community; it is imperative that effort is put into increasing public participation in the planning process, as San Francisco has done, Shelly Poticha explained, by tying marketing to investment.



Transit-Oriented Development as a driver to increased land values was a key concept discussed on Day 2 of the workshop. Slide from Scott Bernstein's, President of Center for Neighborhood Technology, presentation.

Presentations: **Strategies**

The plenary session broke-out into smaller groups that each discussed one of the topics highlighted earlier, and tried to develop a strategy for implementing best practices in the Chicagoland area. Their ideas were presented to the larger group in the form of press releases that tried to outline clear goals and objectives for each topic: Marketing, Finance, Transit-Oriented Development, and Performance Measures.

The **Marketing Group** had several concrete suggestions that would help attract new riders and several ideas about the general direction that a successful marketing campaign would take. Brian Shaw, Director of Transportation at the University of Chicago, wanted to **make service information clearer** in an effort to make the whole transit experience easier for riders; this could be as simple as posting the bus schedule at bus stops. Tom Bulger suggested that CMAP and RTA collaborate to **enable private employers to encourage transit ridership by employees**, and develop a **campaign to both increase employer awareness** of available transit benefits for employees and explain the benefits for employers, which include the ability to recruit and retain employees, and lower costs of doing business. Clayton Lane called for **unifying fare media** and **reducing the time spent on transaction costs** to decrease travel time, increase the convenience of using the system, and improve the service provided. Lane also noted that **branding the buses** would increase the public's recognition of the bus system. Three target markets for the campaign were identified: lawmakers, businesses, and riders. Each market is looking for different results and, therefore, each requires specific marketing. **Lawmakers** are targeted with the overall goal of attaining clean air goals, reducing dependence on foreign sources of energy, and decreasing the size of the region's carbon footprint. **Businesses** are targeted with encouragement to offer transportation benefits and are eager to be "Green-Certified". **Riders** are targeted through ease of service and "going green" campaigns. In addition, RTA is better seen as the center of more transit related matters. Tom warned against calling out specific organizations to avoid backlash, and advised convincing the legislature that new ideas are necessary.

The **Financing Group** focused mostly on the political maneuvering and wherewithal necessary to **secure a capital plan** that would guarantee a source of financing for transit. The group agreed with Brian Imus, Director of Illinois PIRG, that support for a funding bill comes from how it is framed (e.g., an Olympics Surcharge that clearly explains the transit legacy that the Games could leave will garner more support than an unexplained gas tax), but Paul Karas noted that after generating that initial excitement, it is important to have a **clear, transparent delivery mechanism** and an **accounting system that puts cynics' concerns to rest**. Roy Kienitz argued that the hard part is not spending the money, but rather finding it and avoiding feelings of jealousy. He also noted the necessity of building a strong consensus among supporters before any legislation is passed, because the legislation does not specifically dictate how funds are allocated and infighting does not help transit's case for more funding. Anne Canby proposed **establishing different standards for maintenance funds** and funds that might be spent at the discretion of MPOs for expansion and improvements. The necessity of **addressing the concerns of legislators from outside the Chicago area** was clearly understood as vitally important to the success of any transit funding proposals.



Roy Kienitz, Deputy Chief of Staff to Pennsylvania Governor Ed Rendell, presents strategies from the Financing group.

In the **Transit-Oriented Development Group** Lindsay Banks, Kevin Leucke, and Shelly Poticha developed three major goals that drove the rest of their decision-making: **50% of regional growth should be in TODs**, 20% of which should be affordable housing, and ensuring that 75% of all residents have an Eco-Pass. The group also identified more specific goals that they would like to see happen by 2009 and 2016. **By 2009** communities should identify what types of development they would like to see based on their expectations for the levels of density and other factors, and the region should set minimums on affordability requirements. **By 2016**, a ten-mile stretch of the South Lakefront will be a carbon-neutral neighborhood, and world-class transit will be available to connect the Olympics and the lakefront to other parts of the region. Many of the funding mechanisms identified to bankroll and encourage private investment in these goals were adopted from SF Bay Area policies, including **expedited permitting** for TOD and **using capital funds to reward communities** that adopt appropriate land-use regulations and policies. In the ensuing discussion, Tom Downs noted that regional agencies can truly influence land-use decisions only if they control the capital. The group also recognized the importance of **insuring that TOD serves a broad mix of communities and uses**, rather than just focusing on target densities. The group noted that TOD is more affordable than traditional development due to lower transportation costs, as evidenced by CNT's Housing + Transportation Affordability Index.

The **Performance Measures Group** first identified constituents for performance data including riders, management, and legislators. In response to those different audiences, the group developed three different systems of measurement that they believe will allow for a greater amount of accountability and will help the RTA have a better sense of how it is serving customers and communities. The three systems are: **internal management**, **effectiveness from the point of view of riders**, and **external strategic performance measures**. Ultimately, what people are looking for is accountability. One of the group's main conclusions was that it is nearly impossible to impose performance measures outside the purview of a strategic plan; in order to effectively utilize performance measures there must be clearly defined goals set for the service boards and the RTA.

The image shows a screenshot of a presentation slide from SFMTA (San Francisco Municipal Transportation Agency). The slide is titled "Sample operator watch list...". It displays a data table with multiple columns and rows. The columns include various performance metrics such as "Ridership", "Customer Satisfaction", "On-Time Performance", "Safety", "Accessibility", and "Cost Efficiency". The rows represent different operators or service areas. The table is color-coded, with some cells highlighted in pink and others in yellow, indicating different levels of performance or attention. The slide also includes the SFMTA logo and the text "Municipal Transportation Agency".

Presentation from Travis Fox, Manager, Performance Monitoring and Customer Services for San Francisco Municipal Transit Agency, displayed a sample mechanism for

Response to Presentations

The RTA is already trying to implement some of the proposals. More political buy-in, however, even from the RTA board itself, is needed. Frank Beal explained how the CMAP and RTA boards work, and noted that **consensus is hard to achieve** because they represent diverse constituencies and tend to vote in geographic and service board blocs. Tom Downs explained the **need for a vision that originates from the community**. This community vision can drive the bureaucracy, but it must be a regional vision that includes the suburbs as well as the city. He encouraged people to examine the sense of regional purpose and vision in Portland and Sacramento, and the **large public outreach campaigns** that preceded the creation of their development plans. Michael Bolton, from PACE, noted the importance of **focusing on strategic performance measures**, not just measures of efficiency that would help drive and inform the decision-making process in developing a vision. A potential problem that was identified for any incarnation of a strategic plan was the difficulty of developing true institutional buy-in and solid commitments to implementing the policies laid out in that vision.

CONCLUSION

Workshop participants drew several important conclusions. It is vital, however, to emphasize that the primary goal of this workshop was not to simply bring together great minds from around the country to talk about their ideas and projects, but rather to initiate a process of change in the Chicago region. This workshop represents the start of a campaign to change the fundamental principles that have guided transportation finance, planning, and operation for the past century.

The most frequently mentioned theme was building political and public support for mass transit. The development of such a base would strengthen the ability of the service boards, the RTA, and CMAP to embark on successful campaigns for more funding or authority, and it would truly change the tenor of the funding debate. It would also signify the end of the current trend that leaves transit perpetually hanging from a thread and facing the unenviable task of cutting service or significantly raising fares. The RTA and CMAP can begin the process of creating a broad base of support through an aggressive and effective public outreach campaign that invigorates people in the region and gives them a stake in planning decisions.

A strategic plan, developed by the RTA, CMAP, and the general public, must inform the day-to-day and yearly decisions taken by the transit providers and speak to the needs of the region's people. Armed with the best practices discussed in this workshop, planners can develop strategies that leverage the increased public focus on the environment, energy security, and the economy into a continued interest in transit and the cultural shift necessary for sustainable growth in the Chicago area.

The Chicago Olympics bid gives the city a unique opportunity to capitalize on the increased attention and development that such an event will bring, and create a transportation system that will continue to serve the needs of the city long after the Games leave. Yet even without the Olympics, the push to create a new way to operate transit in Chicago must continue. This workshop, if nothing else, demonstrated the extreme interconnectedness of transit with all parts of a healthy, vibrant, and sustainable city.

RECOMMENDATIONS FOR CHICAGO REGION

One of the goals of this workshop was to develop a specific set of policy recommendations that would increase the ability of the Chicago-area transit operators and the RTA to capture more value for the service they provide. The following proposals are a synopsis of the innovative suggestions offered by the assembled industry experts.

MARKETING

- Pace and the CTA should brand their bus systems similarly to the train system, color code the bus lines with the stops. In addition they should post headways and route information at the stops in order to make the entire system more accessible, convenient, and easy to use.
- Metra, Pace, and the CTA need to unify their fare media. Allowing a person to use one form of payment to traverse the entire region will greatly increase the accessibility and attractiveness of the entire system to both existing and potential customers.
- Any political campaign that pushes for change should use macro principles, like pollution and energy to spearhead the request for smaller policy revisions. Often the details of transportation and land-use planning are complex and elude the understanding of people who do not profess to have an expert knowledge of the subject matter. The motivation for change, therefore, must come from the appeal in addressing the larger, more understandable, problems.
- Municipalities should tax free parking as a way to raise awareness about the true cost of using valuable potential TOD land for such a passive use that encourages driving. This could also provide funds to seed new TOD or expand transit to bring more existing households into the ½ mile TOD zone.

Photo Credit - Flickr user paul goyette



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FINANCING

- In order to stress the importance of transit operators and need for increased funding, transit providers need to develop broad political support through increased community outreach. A political movement to demand more funding for transit projects must also find a champion who can provide clear leadership and vision in the campaign.
- The MPO and the DOT need to coordinate funding requests and planned infrastructure improvements or expansions. For example, when the DOT does road maintenance it can also easily enhance the transit experience by building bus bump-outs. The various service boards also need to collaborate amongst themselves and with the MPO in order to ensure cohesiveness in any funding request submitted to the legislature and cooperation in implementing any subsequent legislative mandates.
- Create a statewide Intermodal Surface Transportation Fund that receives and then distributes the revenues from all user fees collected in the state. This will free planners from the restrictions of modal silos and allow them to create the best transportation projects for their communities regardless of mode.
- Push for the sub-allocation of federal funds directly to CMAP, who can then equitably and effectively plan, prioritize, and finance both road and transit capital projects.
- Require that all capital outlays within the region are approved by CMAP who is in an advantageous position to ensure that all system expansions or changes fit into a broader regional vision of progress.
 - » CMAP should establish corridor level thresholds of household density that must be achieved through zoning regulations and/or proposed development, before any transit expansion receives funding.

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Photo Credit - CNT Staff

TRANSIT-ORIENTED DEVELOPMENT

- Co-ordinate the efforts of the Chicago Metropolitan Agency for Planning (CMAP), the Regional Transit Authority (RTA), and the service boards in order to integrate transportation and land-use planning.
- Bring together transit providers, municipalities, planning organizations, and private developers to create an equitable strategy for expediting the permit process for TOD.
- CMAP is the Metropolitan Planning Organization (MPO) for the Chicago region; as such they receive and then distribute federal funds to transit operators and local planning organizations. They should commit funds from various federal sources (CMAQ, STP, TIP, etc.) on the order of \$50 million/year for the next 10 years for:
 - » Regional Planning that would create opportunities for greater interconnection throughout the region and along specific TOD corridors;
 - » Capital grants for public improvements related to TOD, this includes amenities within the stations such as benches and heat lamps and projects like sidewalk repair that improve pedestrian access to stations;
 - » Developing a model program for streamlined planning;
 - » Awards for innovative planning;
 - » Helping suburbs develop planning abilities through capacity building and technical assistance;
 - » Location Efficiency grants;
 - » Competitive planning grants for station area planning or housing and retail development.
- CMAP should work with local planning organizations and municipalities to implement a system of form-based coding, which is a method of regulating development to achieve a specific urban form, in this case TOD. Skokie has already moved to adopt this system. Form-based codes eschew classic land-use type segregation and instead use regulations to mandate the appropriate character of development.

Photo Credit - Flickr user Andrew Ciscel



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PERFORMANCE MEASURES

- The RTA needs to develop a Strategic Plan that will give more structure and direction to how performance is measured. In order for measurements to be used constructively the plan needs to define both long-term goals and a timeline for progress toward them.
- The RTA and the transit agencies need to implement performance measures before or during the process of drafting strategies to reach goals, rather than after those strategies have begun.
- The transit agencies need to measure their effectiveness at capturing value for the service they provide. Identifying where service is financially functional and where it is over or under-utilized will help validate expansion or service changes.
- Measure the economic benefits seen by transit users. Measure the accessibility of the system for people trying to get to work and measure the amount of money people save by driving less or selling their cars altogether.
- Any performance measures that the RTA, or any of the transit boards, use to evaluate their service need to include the perspectives of myriad constituencies, and be made readily available to those different groups. Customers, employees, management, and taxpayers all have different criteria that they use to judge the effectiveness of the transit system, and performance measures should reflect those various interests.
- In addition to evaluating public transit, CMAP should evaluate the region's highways and publish the results. This will give customers and taxpayers the ability to critically analyze both the transit system and the roads, and provide benchmarks for the entire region.

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Best Practices in **Marketing**

Motivation

Historically, most public transit systems in the United States did not conduct marketing campaigns or run marketing departments in the manner of private companies. Nationally, transit agencies receive on average only 41% of their revenue from farebox receipts, and have relied on governmental subsidies to cover the shortfall.¹ The available subsidies have been insufficient and operating costs have dramatically increased, creating an increasingly unsustainable situation for service providers. Transit systems must now make concerted efforts to increase ridership and bring in more revenue.

Goals & Reframing the Debate

Transit providers confront a century of cultural and political preferences for automobiles. At their points of lowest ridership, many transit systems nationwide served exclusively the needs of captive riders, who had no transportation option other than public transit. In order to significantly increase ridership transit providers must use marketing to attract choice riders who have access to a car and convince them to choose to take transit.

Marketing should be tied to investment. Marketing often includes efforts such as advertising that do not directly change the nature of services offered by a transit agency. However, a more comprehensive view recognizes that marketing tools can be used to help transit agencies improve their services, and position themselves most effectively to increase ridership and revenue.

Strategies

Transit agencies can adopt the following marketing practices to improve services, increase ridership, and draw greater revenue

Define the Customer – A market analysis can indicate precisely who uses the transit system and what factors influence choice riders' decision to use public transit. Traditionally, choice riders have used public transit only for commute trips. To significantly increase ridership, transit providers must identify key factors to attract these riders for a broader range of trips. A firm understanding of demographics and motivations of different kinds of user allow the transit provider to deliver the best possible service.



Improve Convenience – Providing convenient access to the transit system will dramatically increase ridership. Unifying fare media, creating low-cost neighborhood passes, and integrating car sharing with the transit network as a last-mile solution all serve to make it much easier for new and existing riders to use transit. Delivering clear service information and branding the bus system also attract riders to use transit.

Create Demand – In order to successfully sell a product, there must be a market demand for it. Service boards must package their services into understandable products, and move away from the assumption that everyone appreciates the uses of public transit.

Tie Marketing to Investment – Marketing should be used to drive planning and evaluation. The planning process can be a way to involve people at all levels and make them invested in the transit system. Macro principles like energy security, climate change, and environmental and health benefits should be emphasized to foster community commitment to transit investment.

¹ Deep Discount Transit Passes in the Long-Term Sustainability of Transit Agencies; Cornelius Kofi Nuworsoo ; (California Polytechnic State University, San Luis Obispo) PATH-UTC Conference, Oct 2007. From Research to Practice

Target Audiences

A successful transit marketing strategy addresses the following audiences

Lawmakers should be targeted with cost-saving opportunities of transit, and the broader goals of sustainability: attaining clean air goals, reducing dependence on foreign sources of energy, and decreasing the size of the region's carbon footprint.

Businesses can be encouraged to offer transportation benefits to their employees, for their own benefit of tax savings, increased parking availability for customers, and environmentally green identity that attracts conscientious customers. Business participation will increase if the service boards can provide an accessible center to address all questions regarding transit benefit programs.

Riders should be targeted with the cost- and time-saving benefits of transit, the system's ease of use, and public transit as an environmentally responsible alternative to car travel.

Successful Examples

Expert

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ECO Pass

Deep Discount Group Pass Program in Boulder, Colorado

In Boulder, Colorado, the ECO Pass is an unlimited-use, photo-ID Bus pass. Employers can offer their employees a Business Pass for \$35 to \$120 per employee/year. Neighborhood Passes are offered to residents for \$75 - \$130/household. Neighborhood Passes operate on a medical insurance model where passes are purchased for all individuals in a Special Service Area. The transit program increases its revenue by setting the price so that the total collected for providing a pass for everyone is greater than the revenues that would have been received from individual fares, plus administrative costs. ECO Pass offers convenience and attracts choice riders by removing barriers: no cash or exact change is required and frequent direct expenses are eliminated. The program also encourages use by first-time riders, and by seldom and regular riders because it competes with the "car keys in the pocket." To employers, ECO Pass is attractive as an employee recruitment and retention tool. Participation allows businesses to benefit from "Green Business" status, reduction in parking and congestion costs, and ability to recruit the second wage earner of a one-car family. For the transit agency, group pass revenue is collected and available by the beginning of the financial cycle, and the program offers significantly reduced administrative burden compared to other fare products. www.bouldercounty.org/ecopass

Expert

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FareCheck

Pre-Tax Employer Transit Pass

FareCheck helps employers and employees benefit from federal tax incentives that encourage use of pre-tax earnings to buy transit passes. In the Chicago Area, employers save \$5.6 million in payroll taxes and employees save \$24 million annually. Over \$30 million in savings is achieved without a single discount, incentive, or subsidy from the transit agency. Additionally, participants of the FareCheck in Chicago saved 30 million gallons of gasoline, which translated to roughly 586 million pounds of carbon per year not pumped into Chicago's air. The savings in fuel costs and congestion amounted to an additional \$114 million in savings that remained in the Chicago-area economy. www.rtachicago.com/infocenter/farecheck



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Expert

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Car Sharing

The "Last-Mile-Solution"

Communities reap significant social and environmental benefits by reducing the use of auto use and ownership. Car sharing programs encourage members to drive less, ride alternative transportation, and drive only fuel-efficient vehicles when a car is needed. These programs also dramatically increase savings in the participant's pocket by eliminating the costs of car-ownership. Almost half of all car-sharing members sell or postpone purchasing a car and now 84% have no household vehicle. Biking, walking, and transit use increases, and driving decreases by 87%. In Chicago, shared I-GO cars are located near CTA stations, transit fare media is unified with the "Smart Card" for vehicle access, and both are featured in an integrated marketing campaign. The city is well positioned to work towards a future with a car share on every block. www.igocars.org

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Best Practices in **Financing**

Motivation

Transit does not pay for itself through farebox revenues. Nationally transit providers recover only 41% of their expenses through fares. The current political climate favors cost-cutting over improvements or even maintenance of our existing infrastructure and service, making it increasingly difficult for transit agencies to rely upon traditional governmental subsidies. Transit agencies and legislators must find new and innovative financing methods to cover the widening gap between revenues and expenditures.

Goals & Reframing the Debate

Transit agencies may have extensive goals to improve or expand service, but nothing can materialize without adequate funding. In order to continue providing high-quality and affordable service or expand coverage, transit agencies must develop sustainable sources of adequate funding. Innovative financing mechanisms that capture the added value of transit-rich areas can be packaged into reliable funding streams to make transit improvements a reality. This value can also be leveraged by transit agencies for greater influence in promoting TOD growth.

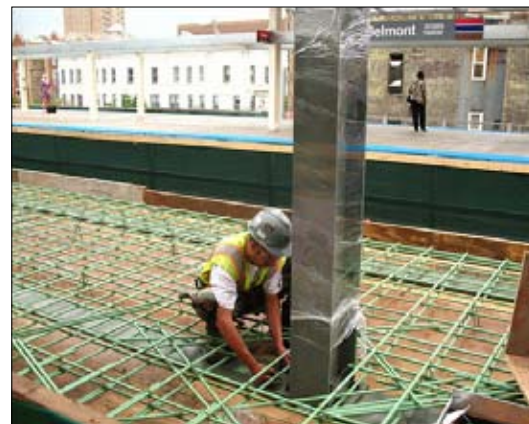


Photo Credit - Flickr user TheeErin

Strategies

funding strategies that are promising opportunities for transit financing

Public Private Partnerships – Public private partnerships allow transit agencies to monetize assets that they already hold. In the most direct application of this funding strategy, transit agencies sell to private parties the rights to operate trains or buses on the agency's infrastructure. Similarly, a transit agency may sell or lease to private developers the land within its right-of-way, for the purpose of creating TODs in areas surrounding the rail assets.

Change funding allocation to favor MPOs – The current funding allocation structure indirectly favors highway spending. State DOTs and transit agencies are located in separate silos that are governed by strictly-defined funding and reporting schemes, limited respectively to building highways or running trains. One way to increase funding for transit would be to increase the proportion of funds to MPO's with the authority to invest the money in transportation that best suits the needs of the region, especially in urban areas that would tend to favor mass transit.

Creation of new assessment areas – Special Service Areas (SSA's) are sub-sections of municipal areas that elect to increase taxes on themselves to fund specific projects. SSA's are already widely used throughout the Chicago area; there are currently 48 in operation. To fund larger projects such as transit, larger Special Service Areas must be organized. The use of ballot initiatives has been largely successful in securing local funding for transit in many communities.

Target Audiences

Politicians, from local to national levels, control the purse strings to fund transportation. They can also dictate restructuring of bureaucratic institutions to finance transit, as evidenced by the passage of H.B 656. Therefore, it is important to present them with data that illustrate how their constituents stand to benefit from increased investment in mass transit. Oftentimes, investments in transit rather than road-building can be stretched much further to benefit communities and directly improve quality of life with decreased costs, congestion, and pollution.

Business Community – Funding for mass transit translates into congestion mitigation, increased efficiency, and larger profit margins for businesses. Partnerships with business interests can help garner new votes among the business community, which can be a powerful ally in the struggle to align financing tools for transit.

Successful Examples

Expert
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California

Suballocation of Transportation Funds

In 1997, SB 45 was introduced by the California legislature and subsequently signed into law by Governor Pete Wilson. SB 45 significantly increased the authority of regional transportation planning agencies and metropolitan planning organizations to allocate transportation funding. SB 45 devolved spending allocation decisions to more local levels better able to respond to the needs of local citizens. Section 42 of SB 45 mandates that 75% of “funds made available for transportation capital improvement projects” be dedicated to regional improvements that are controlled by local planning agencies. The remaining 25% is reserved for interregional improvements and remains in state control. Several studies have shown a dramatic increase in transit programs after the enactment of SB 45. In the first four years following the bill’s passage, California alone accounted for over half of all federal funds spent on transit.¹ www.serconline.org/transFund/stateactivity.html

Denver

Special Service Area

In 2004, citizens of Denver and 30 neighboring communities voted to levy an additional 0.4% sales tax in their area to fund a \$4.7 billion, 12 year expansion of the area’s light rail and transit systems. The FasTracks program implemented through that referendum represents one of the most aggressive and progressive transit plans in the United States. It proposed to build 119 miles of new track and introduce new bus lines. This included several BRT routes that ultimately connected not only the outer ring suburbs to downtown Denver, but the suburbs to each other as well. The referendum passed with a 58% to 42% majority, and the project continues to enjoy widespread support among voters. A survey conducted by the Regional Transit District (RTD) showed that the percentage of people with a favorable impression of the FasTracks projects had increased to 79% by 2007. Metropolitan residents desire expanded transit, and they demonstrate their enthusiasm when given the opportunity to support expansion measures at the ballot box. www.rtd-fastracks.com



Photo Credit - Flickr user - Jeffrey Beall

¹ <http://www.serconline.org/transFund/stateactivity.html>



Best Practices in **Transit-Oriented Development**

Motivation

After WWII, the U.S. witnessed a mass exodus from inner cities. Homebuyers, lured by affordable housing and easy access to employment via the growing highway system, relocated to far-flung suburbs without access to transit. Today, with dramatic increases in gasoline prices, the cost of living far from a city center, and far from reliable transit, has become unsustainable. In 2007 American commuters lost 4.2 billion hours and burned 2.9 billion gallons of gasoline while sitting in traffic—for a total cost of \$78 billion.



Photo Credit - Flickr user Zesmerelda

Goals & Reframing the Debate

Transit-Oriented Development (TOD) offers a bright alternative to our car-dependent culture. It is a comprehensive vision and a concrete approach to create a future of mixed-use neighborhoods, interconnected by transit, with integrated, location-efficient job centers, housing, and commercial areas. TOD increases the overall value and attractiveness of an area: citizens are relieved of the economic burdens of car ownership, and their communities avoid the environmental costs of burning the gasoline that constitutes one-third of our country's carbon emissions.

Strategies

funding strategies that are promising opportunities for transit financing

A Regional Approach – A regional vision is necessary to involve all communities along a transit corridor to embrace TOD around their stations. Additionally, TOD must address growth beyond the immediate ½-mile area around transit stations traditionally considered within the purview of transit agencies. A holistic vision that incorporates the needs of everyone in the region serves to rally support from stakeholders at all levels, from residents to state politicians.

Innovative Financing – Successful financing of TOD recognizes the link between housing and transportation costs, and captures the value added to an area by the introduction or improvement of transit. Higher land values do not necessarily stipulate exclusive developments. Local and regional governments can leverage this value to shape socially equitable and affordable growth. In Special Assessment Districts, constituents vote to increase taxes in order to fund local projects, including affordable TOD in their neighborhoods. Tax-Increment Financing (TIF) has been widely used in Chicago to incentivize development, and can also aid in paying for transit maintenance and system expansion. In Joint-Development efforts, the transit service provider leases land within its right-of-way to private developers, in exchange for influence in the planning and development to boost ridership and increase revenue to pay for more transit.

Broad Political Support – TOD requires the cooperation of many stakeholders, including some with conflicting agendas. To garner support from of a broad political movement, TOD advocates should 1) invest heavily in public involvement early in the project planning process within existing communities, and 2) recruit a local champion who can exert political pressure at a higher level. Such an advocate will bring together several key constituencies who must recognize the benefits of TOD in order to ensure its successful implementation.

Target Audiences

Area Residents – People who live within transit station areas can be the strongest advocates for a TOD project and help to move it swiftly to completion. At the same time, they can be its staunchest opponents and raise costs by creating interminable delays. It is therefore crucial to involve the public in TOD development processes by providing meaningful opportunities for residents to influence the outcomes of development plans.



Photo Credit - Flickr user TheeErin

Politicians control the purse strings for programs that can expedite the development process. Therefore, they should be motivated to align incentives for TOD projects, by being made aware of potential benefits to their constituents. An effective strategy is to inform politicians of the average transportation cost faced by their constituents, as compared to state or national averages. Whether the figure is above or below average, TOD investment would lower that burden for a district.

Local Planning Organizations – While successful TOD relies upon a regional plan, local zoning and planning agencies are the organizations that make actual land-use decisions and implement TOD projects to realize that vision. Regional MPOs can aid these smaller groups in by providing human resources and technical expertise to develop local station area plans that advance the region's goals.

Service Providers – Transit is the backbone of TOD. Individual service providers should coordinate land-use and transportation planning with regional planners to ensure that developers have opportunities to work at proposed or existing station areas. Transit providers should maintain a certain level of flexibility to facilitate successful TOD. Potential for increased ridership and revenue should encourage the commitment of transit operators to TOD.



Photo Credit - Flickr user TheeErin

Successful Examples

Expert

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Minneapolis Hiawatha Line

The impetus to create the Hiawatha Line, the first light rail passenger line in Minnesota, stemmed from politicians. They understood that the rail line would be considerably more costly than a proposed busway, but they also recognized that a rail line would mitigate congestion and stimulate private development. Minneapolis has long utilized comprehensive planning to steer development within the city. Since 2000, Minneapolis's Comprehensive Plan has clearly delineated the City's role and the types of development it will support.

Specifically, the city "will designate and develop selected Growth Centers which will be well served by transit and alternative transportation, have superior amenities, accommodate a range of housing needs and offer attractive employment opportunities." It will also "coordinate land use and transportation planning on designated Community Corridors streets [and] direct its share of regional growth to areas well served by transit."¹ www.metrotransit.org/rail/



Photo Credit - Flickr user bdummette

Oakland, CA Fruitvale Transit Village

In 1991 the Bay Area Rapid Transit (BART) district introduced plans to build a multi-layered parking garage adjacent to the Fruitvale BART station. However, the garage was met with strong opposition from the Unity Council, a community development corporation representing the low-income, predominantly minority community. The citizens were concerned that the garage would further separate the community from the station, and increase traffic and congestion. The Unity

Council held several community outreach meetings to create an alternative plan for the site. They proposed building a new transit village on the site, but that plan conflicted with BART's established parking policy to replace any spots lost to development around a station with an equal number of spots easily accessible by the station's customers.² To resolve this conflict, BART, the Unity Council, and the Union Pacific Railroad cooperated to relocate the garage, and BART has since abandoned its parking requirement. Moreover, the city of Oakland has also reduced its parking requirements for residential developments to one-half space per dwelling unit, and increased the allowed floor area ratios for commercial developments by 150%. In 1999, as a result of public involvement, critical partnerships, and successful leveraging of mass transit investment, policies and incentives were aligned to produce a \$100 million mixed-use development that included housing, shops, offices, a pedestrian plaza and other community services. The result was a revitalized urban area with reduced traffic and pollution. www.fhwa.dot.gov/environment/ejustice/case/case6.htm



Photo Credit - Flickr user Payton Chung

¹ The Minneapolis Plan. Minneapolis. Community Planning and Economic Development. Planning Department. 2000. 24 Mar. 2000. 6 Oct. 2008 <<http://www.ci.minneapolis.mn.us/master-plans/mplsplan/oldversions/2003/index.asp>>.

² TRB. Using Public Transportation to Reduce the Economic, Social and Human Costs of Personal Immobility. TCRP, 1998. TCRP Web Document 7. 1998. The National Academies Press. 22 Sept. 2008 <http://books.nap.edu/openbook.php?record_id=9438&page=326>.

Category	Item	Value	Unit	Target	Status
Safety	Incidents per 100,000	1.2	per 100,000	1.0	On Track
	Lost and Found	500	per month	500	On Track
	Customer Satisfaction	85%	per survey	80%	On Track
	Employee Turnover	15%	per year	10%	Off Track
Performance	On-Time Performance	98%	per trip	95%	On Track
	Customer Wait Times	5 min	per stop	5 min	On Track
	System Reliability	99.9%	per year	99.5%	On Track
	Energy Efficiency	100 kWh	per mile	100 kWh	On Track

Best Practices in Performance Measures

Motivation

Most American transit agencies use performance measures to guide strategic and management decisions. While some agencies follow strict mandates to assess their performance, others develop their own standards. Many agencies that follow mandated performance-measure have also expanded beyond minimum requirements to develop their own strategic framework for performance evaluation. In the Chicago region, performance measures focus on the operation of existing assets. These inward-looking evaluations neglect broader review of system effects and consequences.

Goals & Reframing the Debate

Performance measures have long been used to monitor existing levels of service and to track progress from previous benchmarks. However, performance measures should be applied in a more strategic manner to drive system-wide improvement, long-range planning, and public outreach. Performance measures can be used proactively to ensure accountability and garner credibility for transit providers.

Strategies

In order for performance measures to be useful, they must address strategically relevant criteria and be presented effectively

Base performance measures on a Strategic Plan – Performance measures must evaluate progress toward short- and long-term goals in time-bound increments. The strategic plan should dictate desired outcomes, while performance measures guide the process and implementation of specific pieces of the plan to achieve long-term results. Performance measures serve to ensure that service boards and oversight committees honor timeframes to complete specific steps of the broader plan. Operational evaluation traditionally used by internal management is distinct from broader measures that help design and communicate transit improvements to attract and retain riders, investors, and partners to the transit system.

Measure performance from different perspectives – True performance measures cannot be dictated by isolated executives seeking to optimize a singular goal of efficiency. Current and potential passengers, economic development directors, and environmental activists all want specific, and often different information. Strategic evaluation must recognize and address myriad perspectives, from the concerns of the most loyal riders, to the factors that will persuade new customers to leave the car at home. Performance measures must also include the oversight board. Currently, Chicago's performance measures are solely for the three service boards; a more holistic approach would better establish and communicate a regional standard of accountability across all the service boards.

Communicate performance measures effectively– Performance measures are only successful if they are understandable and credible to the audience. From the outset, transit operators should make a serious effort to engage and sample customers for their desires. To follow up, performance outcomes must be reported in an honest and transparent manner to engender confidence among the public. Finally, transit providers must make the information readily available, in an easily digestible presentation, to maximize the impact of the work. This can be done by broadly publishing and distributing an annual performance report to the general public. To ensure that the work remains pertinent and effective in driving sustained improvements, the transit operator should continuously solicit public feedback on what is being measured and what should be added.



Photo Credit - Flickr user Zesmerelda

Target Audiences

In order to deliver to the various groups, transit providers and oversight boards must identify the different constituencies and how best to address their concerns using performance measures.

Successful Examples

Expert

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Customers – Performance measures should reflect what customers value most in specific performance, and be set to meet or exceed expectations of current and future customers. This approach will align regional transit priorities to best provide for the clients it is designed to serve.

Taxpayers & Legislators – Both taxpayers and legislators need reassurance that the funding they provide for transit providers is used in an efficient and effective manner. Transit providers' credibility and solvency hinges on their ability to demonstrate that they provide a vital and effective service without superfluous expense.

Employees – For transit employees, performance measures can help employees gauge the relative importance of their various tasks, how their work is valued, and how the system is valued. In large organizations, employees receive many mixed messages, and performance measures can explicitly articulate the desires of management and customers to guide daily work.



Photo Credit - Flickr user TheEFin

San Francisco Municipal Transit Authority Transit Effectiveness Project

The Transit Effectiveness Project (TEP) is an ongoing program of the SFMTA to examine the existing municipal system and advise service improvement efforts. The TEP includes a publicly available report card on service productivity and financial effectiveness. The report card is only a part of the community involvement strategy of TEP, which also includes community meetings in which the SFMTA informs citizens of potential expansions or changes to service and the consequences of inaction. The SFMTA also partners with the city's 311 service to track complaints and compliments in real-time. This partnership has yielded an increase in 30,000 complaints reported, which is a positive indication of public engagement with the transit authority, and has provided the SFMTA with information to adjust its service to better meet the needs of the customers. www.sfmta.com/cms/mtep/tepovert.htm

California Department of Transportation Performance Measurement System

The California Department of Transportation has taken an active role in developing new methods for performance measurement for both highways and transit systems. The Performance Measurement System (PeMS) uses sensors to collect data and process it automatically, making it available in close to real time. CalTrans currently operates 24,000 sensors across the entire state. The enormous amount of data collected by this system is publicly available at many different levels of detail. This system is, therefore, a useful way of providing information to the public. The general public needs only to complete a registration form to access the data from the Caltrans PeMS system. By combining highway and transit data on one system, transit operators are also able to compare their performance directly against non-transit modes by looking at the ratio of transit travel time to highway travel time for parallel trips. www.dot.ca.gov/hq/tsip/tspm/



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