

Metropolitan Transportation Commission
Policy Advisory Council Equity & Access Subcommittee

September 11, 2019

Agenda Item 2

**MTC / World Institute on Disability Sustainable Communities and Climate Resilience for
People with Disabilities Project**

Subject: Update on the Sustainable Communities and Climate Resilience for People with Disabilities project.

Background: In 2018, Caltrans awarded a Senate Bill 1 Planning Grant to MTC and the World Institute on Disability (WID) for the Sustainable Communities and Climate Resilience for People with Disabilities project. Regionally, this project is known as the Transportation Resilience, Accessibility and Climate Sustainability project.

People with disabilities are disproportionately low-income, transit-dependent, and more vulnerable to climate change and natural disasters. Transit agencies, planners, and first responders lack sufficient data and insight into their travel and evacuation needs, preferred modes of transportation, and vulnerabilities. The project will define the types of disabilities that are relevant to transportation policies, programs, and projects, and present a needs assessment and recommendations that are relevant to transit agencies, metropolitan planning organizations, and county congestion management agencies. The project aims to establish a new model of collaboration in which the disability community, transportation planners, service providers, emergency management agencies and partners work together to find creative and innovative solutions and establish long-term partnerships.

Project Update

Since October 2018, WID, with support from MTC, has made significant progress on this project. After developing (1) a methodology for collecting and analyzing demographic and travel data, and (2) a public engagement plan, WID has made substantial progress towards an assessment of the Bay Area's public transportation landscape for people with disabilities, and is nearing the end of the first phase of public engagement for this project.

While MTC is the lead agency for project management and coordination, project oversight is also provided through a project advisory group, made up of disability and transportation experts.

Attached you will find a summary of project activities. Staff will continue to report back to the Equity and Access Subcommittee periodically.

Issues: None

Recommendation: None

Attachments: Attachment A: Project Milestone Schedule and Progress
Attachment B: Methodology Memo
Attachment C: Project Oversight Committee

Transportation Resilience, Accessibility and Climate Sustainability Project
 Project Milestone Schedule and Progress

Task	Task Description	Progress on Work Products	Task Start Date	Task End Date
1	Project Management and Coordination	COMPLETED: Final project scope of work, timeline, and budget ONGOING: quarterly progress reports; summary memos	October 2018	March 2021
2	Demographic and Travel Data Analysis	COMPLETED: Methodology memo for collecting data and conducting analysis; database of disability organizations and groups DUE NEXT QUARTER: regional profiles for people with disability; regional profile of transit and paratransit service levels, coverage, affordability, gaps, and unmet needs	October 2018	July 2019
3	Community Engagement and Needs Assessment	COMPLETED: stakeholder engagement plan; interview and focus group questionnaires ONGOING: Meetings materials and summary notes from advisory group meetings; lists of meetings in Sonoma and Contra Costa counties; Oversight committee meeting summaries DUE NEXT QUARTER: summary memo of interviews and focus groups DUE NEXT TWO QUARTER: final survey instrument; summary memo of survey	January 2019	March 2021
4	Policy Recommendations / Implementation Actions	Summary of key findings; policy framework and implementing actions; Action Plan	October 2019	November 2020
5	Education and Communication Materials	Educational materials and resource book; meeting materials and summary notes; list of meetings in Sonoma and Contra Costa counties; educational materials and resource book	June 2020	November 2020
6	Policy Toolkit / Training for Transportation Agencies	Policy toolkit and collateral materials; workshop materials and summary notes; list of meetings in Sonoma and Contra Costa counties	July 2020	February 2021

PROJECT MEMO

TASK 2: DATA COLLECTION AND ANALYSIS

TASK 3: STAKEHOLDER ENGAGEMENT

Transportation Resilience, Accessibility and Climate Sustainability (TRACS)



January 17, 2019



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Overview

The project “Transportation Resilience, Accessibility and Climate Sustainability” (TRACS) is being funded through the California Department of Transportation’s (Caltrans) Transportation Planning Grants Fiscal Year 2018-19 and will run from October 2018 through March 2021. TRACS is a collaboration between the Metropolitan Transportation Commission (MTC) and the World Institute on Disability (WID): its overarching goals are to understand the experience of people with disabilities (PWDs) in the San Francisco Bay Area with regards to navigating the transportation system; to investigate the details of existing transportation networks, including opportunities and constraints; and provide recommendations on short- and long-term transportation planning actions which empower PWDs to have vibrant lives socially and economically. This project is being performed in conjunction with similar initiatives at the county level in Sonoma County and Contra Costa County, which are also funded through Caltrans’s Transportation Planning Grants. There will be collaboration between TRACS’s managers and those in Sonoma and Contra Costa counties, including through sharing data and co-hosting focus groups of community members and key stakeholders.

The research methodology for this project will include demographic and travel data analysis, a needs assessment a community engagement project. Demographic and Travel Data Analysis (Task 2 in the TRACS project timeline) includes:

1. Developing a database of disability organizations in the 9 County Bay Area;
2. Compiling and analyzing available disability-related data (demographic and transportation); and,
3. Assessing existing transit service and effectiveness.

Community Engagement and Needs Assessment (Task 3 in the TRACS timeline) includes establishing a policy advisory group; participating in partner advisory committees with Sonoma and Contra Costa County; preparing for, conducting and summarizing 10 stakeholder interviews; preparing for, conducting and summarizing 3 focus groups; supporting and attending 2 focus groups in Sonoma and Contra Costa counties; preparing for and hosting 2 stakeholder workshops; supporting and attending 2 stakeholder workshops in Sonoma and Contra Costa counties; and developing, distributing and summarizing an accessible online survey. Project managers may also adopt other research techniques as appropriate, including “crowdsourcing” through social media and direct communications with relevant stakeholders.

Work conducted in Tasks 2 and 3 will serve as the basis for the following activities: (1) Develop Policy Recommendations and Implementation Actions (Task 4); (2) Develop Education and Communication Materials (Task 5); and (3) Develop a Policy Toolkit/Training for Transportation Agencies (Task 6).

Task 2: Demographic and Travel Data Analysis

People with disabilities make up a significant portion of the Bay Area's population and use an array of transportation methods to navigate their daily lives. The Demographic and Travel Data Analysis segment of the TRACS will analyze the transportation landscape as it applies to people with disabilities, including but not limited to: existing array of disability organizations and other relevant stakeholders; makeup of the disability population in the Bay Area; currently available transportation options; use of assorted transportation methods (by PWDs in general and by specific population groups); constraints with regards to capacity, funding and efficiency; and efforts to modify or improve the overall transportation system. This Task will also look to anticipated demographic shifts, infrastructure investments, new transportation options (e.g. readily-available accessible vehicles from transportation network companies), medical service changes impacting PWDs' mobility needs (e.g. consolidation of medical services from multiple geographically-dispersed providers into a smaller number of large facilities), etc. This information from our research and other sources will be used to inform the TRACS's Community Engagement and Needs Assessment (Task 3) as well as final policy recommendations, public education and training (Tasks 4-6).

The Demographic and Travel Data Analysis segment of TRACS includes:

1. Develop a Methodology for Data Collection and Analysis
2. Develop a Database of Disability Organizations (9 County Bay Area)
3. Compile and Analyze Available Disability-Related Data (demographic and transportation)
4. Assess Existing Transit Service and Effectiveness

Task 2.1: Develop a Methodology for Data Collection and Analysis

The TRACS timeline includes the development of a methodology memo for collecting and analyzing data relevant to the overall project. The memo will outline strategies for the 3 main categories of *Demographic and Travel Data Analysis*: developing a database of disability organizations, compiling and analyzing disability-related data (demographic and transportation), and assessing existing transit service and effectiveness. Pages 4-10 of this document serve as the methodology memo outlined in Task 2.1.

Task 2.2: Develop a Database of Disability Organizations (9 County Bay Area)

The TRACS initiative will develop a comprehensive database of disability organizations in the 9 County Bay Area. However, relevant stakeholders go far beyond "disability organizations" as usually understood (e.g. Independent Living Centers, Regional Centers, and Paratransit operators). Focus groups, interviews, surveys and other outreach (social media, emails, etc.) will

all be much more valuable for research and policy outcomes if they are done through a diversity of stakeholders representing and serving people with disabilities, as well as stakeholders involved in transportation, technology, infrastructure planning and more. Therefore, the list of stakeholders that will be assembled by our team may include, but not be limited to:

- Independent Living Centers (ILCs)
- Regional Centers and other organizations for people with developmental disabilities
- Disability-oriented government agencies (e.g. Department of Rehabilitation, Medi-Cal, In-Home Supportive Services, and agencies under the Department of Social Services)
- Government agencies, service providers and other resources for seniors
- Community organizations which support active lifestyles, socialization and recreation
- Disability-oriented transit agencies/providers (e.g. Paratransit operators or public transit ADA coordinators)
- Fixed-route transit agencies and related stakeholders
- Volunteer driving programs and networks
- Infrastructure planning and permitting stakeholders, including those focused on transit-oriented housing and other related regional planning efforts
- Researchers, consultants, and other relevant experts addressing inclusive, accessible and sustainable transportation
- Government agencies and other organizations focused on disaster readiness and response (DRR), especially those with an interest in disability-inclusive DRR
- Researchers, consultants, and other relevant experts addressing disability-inclusive DRR
- Transportation service providers including representatives from Transportation Network Companies (TNCs), shared mobility (scooter- and bike-sharing) companies, etc.
- Technology developers, i.e. automated vehicle (AV) companies and pilot projects

Due to the geographic focus of this project, the database will primarily include government agencies, community organizations and other resources who directly serve the Bay Area as a whole, specific Bay Area counties, and/or individual cities. Any organizations or individuals outside of the 9-County Bay Area will be limited to those with valuable expertise unavailable in the immediate region, transportation product/service providers and developers (e.g. TNC or AV companies) with potential interests in the Bay Area, and/or agencies whose regional footprint includes the Bay Area (e.g. California Office of Emergency Services or FEMA Region 9).

The full list of relevant organizations, agencies and other stakeholders will be assembled using a spreadsheet in a shared Google Drive folder available to all TRACS team-members. The spreadsheet will have 3 tabs: one for individuals (e.g. advocates, policy experts, and researchers); one for California organizations, groups and companies; and one for national organizations, groups and companies. The contact list will include information such as organization type,

location, city/county/counties of service, contact information, social media handles, primary point of contact (POC), and check boxes for characteristics or areas-of-focus (nonprofit, government, consultant, disability, disability types, fixed-route transit, paratransit, policy, technology, etc.) to be used for filtering as needed. The database itself will be populated using a combination of existing MTC contacts (including from previous Coordinated Plans), WID contacts, research by team-members, and ongoing additions as we encounter new stakeholders.

The TRACS team will use the list to gather interviews and focus groups, as well as announce final workshops and distribute resources. We will also use the list to establish a policy advisory group (Task 3.1) comprised of stakeholders with diverse constituencies, responsibilities and insights. Finally, the database will appear in TRACS publications, although points-of-contact will only be included with permission. Our intention is for the database to serve as a resource for Bay Area policymakers and service providers as they improve the transportation system into the future.

Task 2.3: Compile and Analyze Available Disability-Related Data (demographic and transportation)

Quantitative and qualitative data will provide valuable insights into the current experience of PWDs in TRACS's project areas. Demographic information such as prevalence of disability (in general and for specific disability categories), age ranges, employment rates, income distributions and poverty levels will inform transit planning, affordability considerations, and more. Given that this project intends to lay out recommendations for long-term planning, demographic information should include anticipated changes in age distribution, prevalence of disability, etc. in the Bay Area. Current and anticipated travel patterns of PWDs (personal vehicle, specific bus/rail routes, paratransit, ride-sharing, etc.) will likewise be useful. We will explore the characteristics of the existing transit system – including roadway networks, fixed-route rail and bus lines, paratransit operators, and respective service loads and finances – to understand what is available to PWDs; this should also look forward to planned and potential transformations, such as those laid out in Bay Area Plan 2040 or “transformative shifts” such as rapid adoption of AV fleets or outsourcing of paratransit services to TNCs.

One of TRACS's overarching goals is that of addressing climate resilience and disaster readiness/response in any final recommendations; data should therefore include climate- and disaster-related information, such as transit asset vulnerability to sea level rise (SLR), probability and effects of disasters (wildfire, earthquake, etc.), and extreme heat events which make staying outdoors when waiting for transit dangerous to PWDs' health. This information and more will paint a picture of the current experience of PWDs, lay out barriers and opportunities, and inform future decisions to improve community integration and well-being for PWDs in the Bay Area.

We recognize that there needs to be significant breadth and detail for each of these data categories, and the TRACS team has limited time and resources. Therefore, this section *will not compile all* relevant data, but rather provide a *high-level picture* of the situation in the Bay Area, as well as anticipated and potential changes in the future. We will also provide directions to data sources (e.g. American Communities Survey demographic information and the National Household Travel Survey data-set) and strategies for regional, county and local stakeholders to utilize the information they find as they develop more specific plans and investments.

The following are important pieces of information and brief descriptions of data and potential sources. More relevant information not listed here may be included in this research.

- **Demographic data** including disability prevalence, employment rates, income levels, age distribution, and intersections thereof. Much of this information can be found through the American Communities Survey (ACS), with full tables – including at state, county and city levels – available at <https://factfinder.census.gov>. We will identify other demographic sources available to planners.
- **Anticipated demographic changes**, especially for overall populations, employment and income levels, rates of disability and age distributions. Much of this depends on assumptions about changes in the economy, as is noted in Bay Area Plan 2040.
- **Bay Area transportation networks** including an overview of freeways, highways, bridges and surface streets; transit agencies (bus and rail) and routes; paratransit operators; taxis and TNCs; bicycle and scooter sharing programs; and pedestrian pathways.
- **Transportation usage** patterns including personal vehicle ownership and vehicle miles traveled, use of TNCs, taxi ridership, paratransit ridership, and any information on bicycle and scooter share programs. TRACS will also research compensatory behavior for PWDs, such as reducing travel, asking others for rides, limiting travel to daytime, etc. Sources will include existing travel surveys, information from service providers, and other relevant research and publications.
- **Transportation used by people with disabilities**, wherever information is available. This will be difficult to identify in some cases: for example, PWDs under 65 are eligible for Regional Transit Cards (RTC) by Clipper, while PWDs over 65 use Senior Clipper cards that do not identify them as having a disability. Some PWDs simply do not know about or do not use RTC cards and pay full fares – or they pay discounted cash fares on buses, where discounted fares do not differentiate between youth, PWDs and seniors. Therefore, research will use appropriate methodologies to develop estimates of transportation patterns given available data. All estimates will include ranges of uncertainty as needed.
- **Future changes in the transportation system** of the Bay Area and specific Counties or sub-regions. This includes planned, anticipated and potential infrastructure investments; changes in housing or economic makeup that will influence transportation planning; and

preparation for potential transformative shifts (e.g. expansions of AV networks or disruptions from climate change).

Task 2.4: Assess Existing Transit Service and Effectiveness

The TRACS project will build on the data above to assess the overall effectiveness of the transit system for PWDs. The research in this section will include, but not be limited to, paratransit service, fixed-route transit accessibility, first- and last-mile connection challenges, initiatives addressing evacuation in emergencies or natural disasters, community engagement, and efforts to improve any problematic or inadequate service.

Significant research in this area has already been conducted as a part of the Coordinated Plan 2018, which outlines existing transportation systems used by PWDs and provides recommendations for improving those systems and, in turn, the lives of PWDs. However, the Coordinated Plan is somewhat limited in its assessment of transit effectiveness: a heavy focus is placed on transportation for reaching medical services, partly at the expense of addressing independent living, employment and community integration. There is also little focus on disaster readiness and evacuation. Finally, the actual data presented in the Coordinated Plan lacks sufficient detail for our project research: the section on Transportation Resources (chapter 3) includes a list of service providers (fixed-route transit, ADA-mandated paratransit, volunteer driver programs, information and referral services, and mobility management providers) and some written examples for each category – but of this list, only mobility management providers have written-out descriptions for each provider. The others mainly list service areas.

For the purposes of TRACS, we must dive deeper into the under-addressed areas of the Coordinated Plan and gather more detail on specific transit resources and service providers. As with our efforts on compiling and analyzing disability-related data, we must respect available time and bandwidth, so some areas of this section may present guidelines to transit planners on how to collect relevant information and analyze it accordingly. Finally, we will seek information on efforts of stakeholders outside of the Bay Area to improve transit effectiveness for PWDs in their region: because a goal of TRACS is to provide guidance on improving the Bay Area’s system, it will support the project to learn from other areas’ actions and concrete benefits they have provided or are anticipated to provide for the disability population.

The main research areas and methods for collecting data will include:

- **Data on current and planned fixed-route transit services.** The TRACS team will collect information on service area, transit type, and other relevant details of fixed-route transit providers (rail, bus, ferry, etc.); some detailed information may include transit fares and overall ridership. This will also cover best estimates of ridership of PWDs specifically and available information on access barriers by PWDs (e.g. lack of nearby transit stops,

unreliable schedules, broken or dirty elevators, or personal safety concerns). Initial data may be gathered using reports by agencies or advocacy organizations; results of previously-conducted surveys; formal complaints collected by transportation agencies or oversight boards; and other available resources. Agency plans regarding changes to service (e.g. expanded or reduced bus routes or adjusted fares) or noted efforts to improve access barriers will also be included.

- **Data on current and planned paratransit services.** The Bay Area has between 15 and 20 ADA-mandated paratransit providers which partner directly or indirectly with transit agencies. We will gather quantitative information about the service providers – ridership, cost per ride, necessary advance notice, reliability, budget concerns, etc. – as well as qualitative feedback from publicly-available sources. The Coordinated Plan notes that paratransit service providers are facing significant concerns with regards to finances, reliability and timeliness, and recommends revisiting the existing paratransit service model (some recommendations include outsourcing of services or creating more stringent eligibility requirements). TRACS will outline providers’ current plans for adjusting their service model, as well as any current proceedings for organizational assessments that may lead to significant changes.
- **Data on other current and planned/potential transportation systems.** The Bay Area features many other transportation options outside of fixed-route transit and paratransit that may be used by PWDs. These include, but are not limited to, transportation network companies (TNCs), conventional taxis, bicycle- and scooter-share programs, pedestrian walkways and bike lanes, wheelchair van rentals, and personal vehicles. These systems are almost certainly going to transform in the coming years, and new technologies will enter the fray (such as “fleets” of automated vehicles which operate like current TNCs, but without drivers). TRACS will collect data on these resources and connect with stakeholders about potential new transportation options.
- **Assess station access concerns.** There have been ongoing public concerns regarding physical access to fixed-route transit, especially around the reliability and cleanliness of elevators at BART stations. These are so severe that BART is facing legal proceedings under the Americans with Disabilities Act (ADA). TRACS’s research will visit these and other concerns and any efforts by transit providers to address problems (e.g. installing additional elevators for redundancy, which has been done at some stations). Data collection will happen through contacting transit operator ADA coordinators and staff at disability service organizations, including those filing petitions or legal action.
- **Assess first- and last-mile connection challenges.** With appropriate information and training, a journey on transit from the first stop to the last is usually relatively seamless, if a bit time-consuming – although with transfers, there can be delays. However, “first-mile” and “last-mile” connections (getting from the front door of a home or business to

the initial transit stop) can be extremely difficult, especially in areas with dispersed transit routes and/or in unpleasant weather. This project will gather data on options for first- and last-mile connections and their utilization by PWDs. The project team will contact service providers (paratransit, taxis, TNCs, etc.) to understand their provision of services and any disability-related data available. We will also explore options to identify the use of personal vehicles for first- and last-mile connections, as some PWDs in the Bay Area certainly drive to major transit hubs, notably BART and Caltrain stations.

- **Document existing initiatives related to rescue and evacuation in an emergency or natural disaster.** Man-made and natural disasters are an ever-present danger for the Bay Area. The Bay Area straddles several fault lines and is likely to experience a significant earthquake in the coming decades; terrorism is a non-negligible threat; and climate change will lead to more frequent and destructive fires, flooding, mudslides, power outages and more. Transportation must be resilient and responsive during these and other disasters, especially for individuals without a personal vehicle and/or with the specific transportation needs of many PWDs (e.g. wheelchair-accessible vehicles). Research will be geographically-focused as needed: for example, evacuation efforts are especially pertinent in more rural areas along the urban-wildland interface, which have increasing numbers of seniors and PWDs while facing unique transportation challenges and growing risks of wildfires. We will contact transit management agencies and other relevant stakeholders to identify any existing or planned disaster resilience initiatives to assist with evacuation in general, and specifically for PWDs. We will also contact stakeholders elsewhere to understand if there are any other initiatives that could provide a framework for future efforts here.
- **Explore improved methods for transit agencies to engage the disability community in planning and decision-making processes.** Transit agencies and other planners must practice vibrant public engagement to develop transportation systems that support sustainable communities and the needs of people with disabilities. This section will outline strategies to engage the disability community using multiple media and opportunities to advocate for transit needs. Any outreach should consider the unique situations of disability community-members with regards to Internet connectivity (including Internet-connected mobile phones), community group involvement, and the set of stakeholders who actively contribute to public policy and practice (including organizations, citizen commissions, and advocates who push for systemic change through activism, media engagement, participating in formal proceedings, etc.). This aspect of our project will be split between research-informed recommendations and those gained during the interviews and focus groups in Task 3 (“Community Engagement and Needs Assessment”).

Task 3: Stakeholder Engagement Plan

The Project Timeline of Sustainable Communities and Climate Resiliency for People with Disabilities features Task 3, “Community Engagement and Needs Assessment.” The sub-tasks include:

1. Establish a Policy Advisory Group (9 quarterly meetings)
2. Develop a Stakeholder Engagement Plan
3. Participate in Partner Advisory Committees (Sonoma and Contra Costa County; quarterly)
4. Prepare for, Conduct, and Summarize Ten (10) Stakeholder Interviews
5. Prepare for, Conduct, and Summarize Three (3) Focus Groups
6. Support and Attend Two (2) Focus Groups in Sonoma and Contra Costa Counties
7. Prepare for and Host Two (2) Stakeholder Workshops
8. Support and Attend Two (2) Stakeholder Workshops in Sonoma and Contra Costa Counties
9. Develop, Distribute, and Summarize an Accessible Online Survey

This section of the methodology document represents the deliverable of Task 3.2 (Develop a Stakeholder Engagement Plan). It will outline a strategy for contacting stakeholders (Policy Advisory Group members, interviewees, event attendees, etc.); hosting interviews, meetings, focus groups and workshops; and distributing an online survey.

The Sonoma and Contra Costa County Partner Advisory Committees, who are undertaking concurrent disability-focused transportation studies in their respective counties, will coordinate the majority of outreach in sub-tasks 3.6 and 3.8. We will assist the Partner Advisory Committees as needed; however, our energies will be concentrated on sub-tasks 3.4, 3.5, 3.7, and 3.9. The 3 focus groups and 2 stakeholder workshops in sub-tasks 3.5 & 3.7 will occur outside of Sonoma and Contra Costa Counties: focus groups will be held in the East Bay, South Bay, and San Francisco, while workshops will be held in San Francisco and the East Bay. Stakeholder interviews (sub-task 3.4) and online survey (sub-task 3.9) may include individuals located in Sonoma and/or Contra Costa counties.

Task 3.1: Establish a Policy Advisory Group

TRACS will receive guidance and input from a Policy Advisory Group (PAG) of between 10 and 12 key experts and stakeholders, who will gather for 9 quarterly meetings beginning in March 2019 and ending in March 2021. At the beginning of Q1 2019, TRACS staff will identify approximately 15 potential PAG members and send invitations outlining the goals of TRACS and responsibilities of the PAG. 5 or more other individuals will be identified as a secondary PAG members in case we do not initially secure enough participants or if a PAG member is unable to continue attending at some point. Invitations will be drafted by WID staff and vetted by MTC.

Responsibilities of the PAG will include, but may not be limited to:

- Participating in one 2-hour meeting per quarter from March 2019-March 2021. Meetings will alternate between San Francisco and Berkeley. PAG members may be able to attend remotely if necessary.
- Review meeting agendas and direct TRACS staff to useful information, such as government regulations, overviews of existing or proposed changes to the transportation system, or publications by policy analysts and/or advocacy groups.
- Assist with networking and connecting TRACS staff to helpful resources, potential interviewees, workshop attendees or presenters, etc.
- Be available for communications by email or phone as needed.

The PAG itself will include stakeholders and experts from government, business, nonprofit, and other sectors. The PAG will also represent multiple regions of the Bay Area. Given the range of groups affected by the intersection of transit and disability, a 10-to-12-person group cannot address all viewpoints – however, our goal is for the PAG to provide a balance of knowledge, responsibilities, and areas of service to enable constructive conversation and feedback on as many topics as possible.

Potential PAG members – and thus recipients of initial invitations – may include:

- Transit agency (bus/light-rail) ADA coordinators
- Regional rail staff (BART/CalTrain/Amtrak)
- Paratransit ADA coordinators
- Disaster management officials focused on inclusive planning and response
- Representatives of disability independence advocacy groups (ILCs, DREDF, DRA, etc.)
- Organizations serving seniors, such as Senior Centers and recreation groups
- Disability-specific advocacy groups (physical disability, blind, Deaf/hard-of-hearing, developmental disability, etc.)
- Staff member(s) from volunteer driver, “backup transportation” (e.g. Easy Does It), taxis and other non-public transportation services
- Recreation-focused organizations providing accessible cycles or other alternative transportation options

We intend to secure all PAG members by mid-February 2019 and host the first quarterly meeting in March, with time and location TBD.

Task 3.2: Develop a Stakeholder Engagement Plan

The TRACS timeline includes the development of a Stakeholder Engagement Plan to cover the actions in Task 3 (Community Engagement and Needs Assessment). Pages 11-20 of this document serve as the Stakeholder Engagement Plan outlined in Task 3.2.

Task 3.3: Participate in Partner Advisory Committees (Sonoma and Contra Costa County; quarterly)

Primary team members from MTC and WID will attend Partner Advisory Committees in Sonoma and Contra Costa Counties. 2 WID staff members will attend meetings as needed. Otherwise, Marsha Saxton will be the primary point of contact and meeting attendee for Sonoma County and Alex Ghenis will be the primary point of contact and attendee for Contra Costa County.

Partner Advisory Committee meetings present an opportunity to have a two-way conversation where the TRACS team learns from detailed analysis in Sonoma and Contra Costa Counties, then provide insights to Partner Advisory Committee members based on lessons learned elsewhere. TRACS staff and Committee members will use these meetings as opportunities to revisit, refine and revise strategies for community engagement. Efforts will focus on ensuring consistency across the TRACS and County initiatives to the greatest extent possible.

Tasks 3.4-3.6: Prepare for, Conduct, and Summarize Ten (10) Stakeholder Interviews and Three (3) Focus Groups; Support and Attend Two (2) Focus Groups in Sonoma and Contra Costa Counties

This research will be based in a collaborative project of multiple organizations and individuals in the Bay Area to enable maximum input from the Disability Community in our nine counties. Participating organizations will be listed in our reports.

The primary researchers conducting interviews and focus groups are persons with disabilities working for WID, which is located at the Ed Roberts Campus in Berkeley, CA – a universally-accessible office building which houses several disability services and advocacy organizations. Graduate student interns from the University of California, Berkeley, may assist in the outreach, coordination, recording and analysis of participants' contributions. Whenever possible, we will describe our participant population in terms of social characteristics such as race, gender, educational level, income, disability and so forth, and attempt to reach and represent as socially diverse a population as possible. We will also seek out interviewees representing a variety of official and unofficial positions within the community, for example: Independent Living Center (ILC) staff, social service staff, transportation policy specialists, organized unpaid activists,

government transportation coordinators, transit agency representatives, technology developers, and community members with disabilities unaffiliated with any organization.

TRACS team-members will populate a Google Doc spreadsheet with disability organizations and stakeholders (Task 2.2) representing a broad array with regards to geography, services provided, constituencies, etc. The spreadsheet will include organization name, contact information, primary point of contact, service area, basic description of responsibility/services, and a checklist of characteristics to assist researchers with organizing. In early Q1 2019, we will arrange and prioritize this list of potential interviewees and assign responsibilities for outreach to respective TRACS staff. Interviewees will be invited to participate in individual interviews or focus groups, depending on their responsibilities and position in the disability and/or transportation spheres. Some may be invited to participate in both interviews and focus groups, and there may be flexibility depending on availability and responses. All stakeholders will be invited to complete an online survey in Q4 2019, as well. The survey will be formatted through Survey Monkey and will ensure accessibility for respondents with a full range of impairments. It will ensure that the survey is functional using alternative technology such as screen-reading software for blind/low-vision individuals or voice dictation/navigation software for individuals with physical disabilities.

Ten (10) individual stakeholder interviews will take place approximately once monthly throughout 2019 and three (3) focus groups will occur across Q2 and Q3, 2019. Potential participants will be identified through the TRACS contact spreadsheet and by members of the Policy Advisory Group. Certain high-profile stakeholders and expert informants will be specifically sought out for individual interviews; individuals approached for focus groups who would prefer private conversation may also be interviewed one-on-one depending on their knowledge, personal responsibilities and project bandwidth. Interviewees will represent all nine (9) Bay Area counties; given the margin between number of counties and interviews, some may represent multiple counties. Wherever possible, those who are likely to provide insights which are especially valuable for subsequent interviews, focus groups and/or surveys (e.g. with regards to potential stakeholders, agendas or questions) will be interviewed early in 2019. Interviews will be facilitated by one or two investigators and last 60 to 90 minutes each; they will ideally be conducted in person but may occur over telephone or video chat. Questions will be similar to those posed in focus groups (listed below) and also request recommendations on process for community engagement, data collection and analysis, and public education.

Focus groups will be facilitated by two investigators, and last 60 to 90 minutes each. Groups will be held in locations convenient for participant travel. Some participants will be interviewed individually when they cannot attend groups or prefer individual interviews. Participants who are

approached for individual interviews may also choose to attend focus groups. Individual interviewees will not be precluded from attending groups, although facilitators will ensure that they do not monopolize conversation; this will be the case with all participants.

Sessions will be recorded and transcribed verbatim without names for confidentiality. Some participants individually interviewed may choose to be identified by name. Personal characteristics that are especially pertinent to a participant's experience and/or insights may be noted with permission (e.g. "cognitive disability, transit-only" or "wheelchair user, owns ramp-van with hand controls").

Formal written consents using standard consent forms will be obtained with clear explanation about the purpose and use of participants' ideas and comments. Refreshments will be served; honoraria for participation will be made in the form of \$20 gift cards.

Initial questions posed by interviewers will address a wide range of participant experience, insights and suggestions. Initial interviews with our staff, members of the Ed Roberts Campus community and our Content Experts will enable our expanding list of research questions. Examples may include:

- "How do you navigate your life and community on a regular basis? What is your mix of personal vehicle, public transportation, paratransit, ride-sharing, walking/rolling, or other methods of travel?"
- "How do you navigate special trips or events, such as a night out in the city or going to the airport?"
- "What has been your experience using public transportation as a person with a disability?"
- "What barriers have you encountered in accessing appropriate transportation?"
- "What factors influence which transit methods you use?" (This could include financial costs, convenience, availability, or sticking with comfortable experiences)
- "How do barriers in the transit system affect your daily experience or quality of life?"
- "How would you compare your typical travel experiences with those of someone without a disability? What special changes to your itinerary or accommodations do you make relative to someone without a disability?"
- "Do you have stories or incidents to describe your travel experience, both positive and difficult?"
- "In your conversations with other people with disabilities, are there any aspects of the transportation system that seem especially positive or negative?"

- “What recommendations can you offer to improve transportation services for yourself and others with disabilities?”
- “Imagine an ideal world for you to navigate the Bay Area. What types of transportation would you use, and how would that affect your quality of life?”

Wide open-ended questions will also be employed such as “What else should we ask?” to expand discussion. We will apply the analytic tools of Critical Disability Theory, (Meekosha and Shuttleworth 2009) which is the standard analytic paradigm currently favored in the Disability Scholarly Community. To initiate analysis, focus group and individual interview data will be coded using constant-comparative procedures. (Lincoln and Guba 1985.) Our analysis will present and summarize our research findings, offer illustrative quotes and recommendations from participants.

Contra Costa and Sonoma Counties will host one focus group each in early Q3 2019; we will support and attend these focus groups as part of TRACS (Task 3.6). WID and MTC will collaborate with Contra Costa and Sonoma Counties on methodology for outreach, hosting focus groups, agendas, data collection and analysis. Wherever possible, these County-level focus groups will echo the format of the TRACS-specific events, but with a tighter geographic focus. County-level managers will handle the logistics of the outreach itself, as well as securing locations and any needed accommodations.

Tasks 3.7-3.8: Prepare for and Host Two (2) Stakeholder Workshops; Support and Attend Two (2) Stakeholder Workshops in Sonoma and Contra Costa Counties

MTC and WID will jointly host two workshops with stakeholders representing all nine counties in the Bay Area, to engage people and organizations working with people with disabilities in the social service, health, and transportation sectors. Feedback from the broader disability community will inform the development of planning and policy recommendations. The stakeholder workshops will occur in Q3 2019 and will partly be informed by prior interviews and focus groups, including those specific to Contra Costa and Sonoma counties. In-depth planning, including outreach and agenda-setting, will begin in Q2 2019. These workshops will be developed in concert with Sonoma and Contra Costa Counties to provide consistency with their stakeholder workshops in Q3 and Q4 2019 and ensure that attendees amongst all 4 workshops fairly and comprehensively represent 9-County Bay Area disability stakeholders.

Workshops will last approximately four hours and feature approximately 20-30 participants each. We will invite prior interviewee(s) and/or focus group participant(s) to join these workshops if

we find that they provided constructive insights worthy of more exploration. We will also contact stakeholders in the disability and transportation planning/management arenas who have not otherwise contributed to the TRACS. Each workshop will feature a diverse range of stakeholders, personal identities (disability/race/gender/etc.), areas of professional focus and/or advocacy, etc. to create a vibrant conversation and policy development process.

The agenda for each workshop will include, but not necessarily be limited to:

- Introductions including organization, title, and connection to the disability community and/or transportation network in the bay area.
- Opening presentation about the TRACS project, barriers and opportunities for people with disabilities in navigating the transportation system, and goals for the workshop itself.
- “Breakout” discussions in pairs and/or small groups about personal experience navigating transportation in the Bay Area and elsewhere, insights on positive and negative policies and practices, etc.
- Small group discussions with specific foci, e.g. “improving Paratransit responsiveness,” “community transit education,” “policy development logistics,” and so on. Small groups will have opportunities to present feedback to all workshop attendees.
- Networking opportunities for attendees, including a section for “commitments” to jointly pursue inclusive transportation projects and policies.

We will distribute a questionnaire at the end of each focus group covering attendees’ opinions on most pertinent transportation-related barriers and opportunities, potential partners and coalitions, recommended projects/initiatives, and “lessons learned” during the workshop itself.

TRACS staff will support and attend 2 more workshops in Sonoma and Contra Costa Counties.

Task 3.9: Develop, Distribute and Summarize an Accessible Online Survey

TRACS staff will develop an accessible online survey in Q3 2019 and distribute it through multiple venues (e.g. to contacts’ emails, across listservs, and over social media), also in Q3. We have a draft consent form, included in the Appendix.

Our survey development will begin with qualitative inquiry, described above. We will initially engage with our expert informants and other stakeholders to further develop and vet our focus group questions. We will seek stories and anecdotes from focus group and individual interview participants. From the focus group responses, we will refine the questions which appear to need larger numbers of replies from our broad community. These can offer a bigger picture of the community's experience of transportation resources in our target communities. The surveys will enable a larger and more diverse population than interviews and focus groups with respect to

disability, geography, income, race, sex, age and so forth. The survey will be formatted through Survey Monkey and will ensure accessibility for respondents with a full range of impairments. It will ensure that the survey is functional using alternative technology such as screen-reading software for blind/low-vision individuals or voice dictation/navigation software for individuals with physical disabilities. We will distribute our surveys through multiple online venues and networks (including through WID's and partner organizations' social media profiles, on Bay Area disability Facebook "groups," through partner organizations' newsletters, and over email listservs such as the "Berkeley Disabled" mailing list). We have a draft consent form process for which we will seek approval from Caltrans. Ideally, given a significant magnitude and quality of the survey replies we are able to capture, we will develop qualitative analyses of our data sets.

The survey will request community members with disabilities' insights on traveling through the Bay Area and gather recommendations for improving the overall transportation system. Questions similar to those posed in interviews and focus groups will be included. The survey will also pose hypothetical changes to the transportation system and gauge their effectiveness for influencing PWDs' travel habits and overall well-being.

The survey will be assembled and finalized in Q3 2019, but may include questions such as:

- "Do you own a personal vehicle?" Y/N
 - (if yes) "Is your vehicle modified for your disability?" Answers: [no] – [yes, accessible van] – [yes, car with hand controls] – [yes, other]
 - (if yes) "Are you able to drive on your own?" Y/N
 - (if yes) "Approximately how many days per week do you use your car/van, on average?" Answers: include 1-7 and [less than once per week]
 - (If yes) "What are your top 2 uses for your personal vehicle?" Answers: [to get to work] – [for medical appointments] – [for errands] – [for leisure/travel] – [other]
- "How many times per week do you use the following types of transit?" (Answers for bus, Caltrain, BART, ferry, light rail, etc.)
 - (For each) "What are your top 2 uses for (transit type)?" Answers: [to get to work] – [for medical appointments] – [for errands] – [for leisure/travel] – [other]
 - (for each) "Are there any barriers to you using (transit type)?" Answers: [no] – [limited routes/stops] – [too expensive] – [unreliable schedules] – [broken elevators] – [transit crowding] – [safety concerns]
 - (For each) "Would you use this this transit more frequently if it was more accessible to you? If so, do you have any recommendations?"
- "Have you used paratransit in the previous year?" Y/N

- (if yes) “How frequently do you use paratransit?” Answers: [less than once per month] – [once per month] – [2 or 3 times per month] – [once per week] – [more than once weekly]
- (if yes) “In your experience, how reliable is your local paratransit service?”
- (If no) “What are the primary reasons you do not use paratransit?” Answers: [it is not reliable] – [I am able to navigate my area using other methods] – [I am worried about people seeing me on paratransit] – [etc.]
- “Have you used Transportation Network Companies (TNCs), such as Uber or Lyft?” Y/N
 - (if yes) “How frequently do use TNCs?” Answers: [less than once per month] – [once per month] – [2 or 3 times per month] – [once per week] – [more than once weekly]
 - (if yes) “Have you encountered any disability-related barriers to using TNCs? (Multiple-choice)” Answers: [No, I have not encountered barriers] – [Yes: no accessible vans] – [Yes: no service animals allowed] – [Yes: discriminating or unfriendly drivers] – [Yes: cell phone apps are inaccessible or difficult to use] – [Yes: other _____]
 - (if no) “What are your main reasons for not using TNCs? (Multiple-choice)” Answers: [Other transportation works just fine] – [I do not have a cell phone with Internet] – [Cell phone apps are inaccessible or difficult to use] – [TNC trips are too expensive] – [No accessible vans] – [No service animals allowed] – [Other: _____]
- “What factors influence which transit methods you use?” Answers: [financial costs] – [convenience] – [availability] – [staying with familiar travel methods] – [other: _____]

The questions and answers above are simply illustrative of what may be included in the survey. The exact survey content will be refined to meet proper statistical and research guidelines, and will be informed by input from earlier project research, Policy Advisory Group meetings, interviews, focus groups and workshops.

Finally, the survey will be designed to allow for quantitative analysis to approximate the collective transportation habits of Bay Area residents with disabilities. Survey responses will be anonymous but will collect some demographic information (location, age, gender, employment status, income level, disability type, etc.) that may be cross-referenced against recent Bay Area demographic profiles from the American Communities Survey (ACS) and/or other sources. We recognize that, due to the survey’s limited reach and online distribution methods, any quantitative statements must include caveats about levels of uncertainty. However, given the TRACS’s ideal outputs – recommendations for infrastructure development, investments, policy adjustments, technology use, management, etc. – it will be important to collect both qualitative and quantitative data to inform ongoing transportation planning.

The survey will be open for responses through November 2019; once all responses are collected, survey data will be summarized by the end of Q4. However, if we approach but do not quite reach a statistically significant number of responses, the timeline may be slightly extended to ensure a significant data set. The survey will also be kept online through the end of TRACS, as later responses may be used for insights and analysis in subsequent studies, reports and presentations. A summary report will include basic analysis, while more detailed reflections (in combination with feedback from interviews, focus groups and workshops) will be addressed in Task 4, “Policy Recommendations/Implementation Actions.”

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Appendix: Draft Consent Form for Online Survey

This survey should take about ## minutes to complete. The focus of this survey is how people with disabilities living in the San Francisco Bay Area navigate the world around them. It will ask about how you use public transportation, such as buses, BART and trains as well as use of all other kinds of service vehicles, such as Uber, Lyft, Paratransit, autonomous vehicles, and so forth. The survey will also ask about any use of private cars or vans, and if you drive on your own or rely on others (such as friends, family or caregivers) to drive. Finally, it will ask for your thoughts about how the Bay Area's transportation system could better meet your needs and how you believe proposed changes would affect your life.

Some survey questions will ask about your disability and other characteristics, such as age, employment and income levels. These are used for statistical purposes and will not be used to identify you personally in any reports or future research efforts.

By completing and submitting this online survey, you are giving your consent for your responses to be used by the World Institute on Disability and Metropolitan Transportation Commission for transportation research and planning. Your participation is voluntary and your responses will be kept confidential to ensure your privacy. You are free to decline to answer any questions. By consenting to participate in this survey, you are also verifying that you are a person with a disability living in one or more of the nine San Francisco Bay Area counties. Any report of this

research that is made available to the public will not include your name or any other individual information by which you could be identified.

At the end of the survey, you will have the option to click on another link and enter your email address into a drawing for one of ## \$___ gift cards. This extra step ensures that your email address will be stored separately from your survey responses.

We greatly value your input and willingness to participate in this research. If you have any questions about this study or how responses will be used, please contact us as indicated below.

Transportation Resilience, Accessibility & Climate Sustainability (TRACS)
Policy Oversight Committee Roster

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Deborah Kaplan
Independent (lawyer/activist)

Lewis Kraus
Pacific ADA Center

Community Provider

Nikki Brown-Booker
Easy Does It Emergency Services

Emergency Services

Vance Taylor
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