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Florida Five-Year Transportation Disadvantaged Plan - 1992-1996: Technical Memorandum No. 5 Goals and Objectives: Executive Summary

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**FLORIDA FIVE-YEAR
TRANSPORTATION DISADVANTAGED PLAN
1992 - 1996**

**Technical Memorandum No. 5
Goals and Objectives**

EXECUTIVE SUMMARY

**Prepared for the
Florida Transportation Disadvantaged Commission
and the
Florida Department of Transportation**

**by the
Center for Urban Transportation Research
College of Engineering
University of South Florida**

June 1992

PREFACE

This is the executive summary for the fifth of five technical memoranda to be produced by the Center for Urban Transportation Research (CUTR) for the Transportation Disadvantaged Commission and the Florida Department of Transportation. These memoranda, along with a final report, will comprise the Florida Five-Year Transportation Disadvantaged Plan that is mandated by Chapter 427.013 (14), Florida Statutes.

Technical Memorandum No. 1 provided an introduction and historical perspective to transportation disadvantaged services in Florida. Technical Memorandum No. 2 reported on statewide operating data, on results of an attitudinal and needs survey, and on an evaluation of the existing transportation disadvantaged system in Florida. Technical Memorandum No. 3 presented demand forecasts for transportation disadvantaged transportation services over the next five years. Technical Memorandum No. 4 provided estimates of the cost of meeting the demand and explored the ability of current funding resources to meet that cost. Technical Memorandum No. 5 discusses policy issues, goals and objectives, and implementation strategies.

The preparation of this report has been financed in part through a grant from the U.S. Department of Transportation, Federal Transit Administration (formerly the Urban Mass Transportation Administration), under the Federal Transit Act

FLORIDA FIVE-YEAR TRANSPORTATION DISADVANTAGED PLAN Technical Memorandum No. 5

EXECUTIVE SUMMARY

The technical memorandum that is summarized here presents: (1) methods for addressing the unmet demand for specialized transportation services, (2) a process to evaluate the performance of the local community transportation coordinators and the Transportation Disadvantaged Commission, and (3) a five-year action plan for the commission. As part of the performance evaluation process, goals and objectives have been developed for both the commission and the local coordinators. The commission's goals and objectives are presented in this executive summary. The goals and objectives for the local coordinators, which are very similar to the commission's, are presented in the technical memorandum.

Unmet demand can be dealt with by regulating demand or increasing service.

As indicated by the analysis presented in previous technical memoranda, the demand for TD transportation services in the state by the transportation disadvantaged is significantly

greater than the supply of these services. This unmet demand is due to a number of factors, including the high level of trip subsidization, and there are many policies and actions that can be undertaken to reduce unmet demand.

At perhaps the most basic level, as shown in Figure ES-1, there are two solutions to the problem of unmet demand for TD transportation services: (1) demand for services can be regulated or (2) supply of services can be increased. Within each of these two areas, there are a number of more specific ways in which unmet demand can be reduced. While some of these are beyond the direct control of the commission, most can be influenced by commission policy decisions or actions.

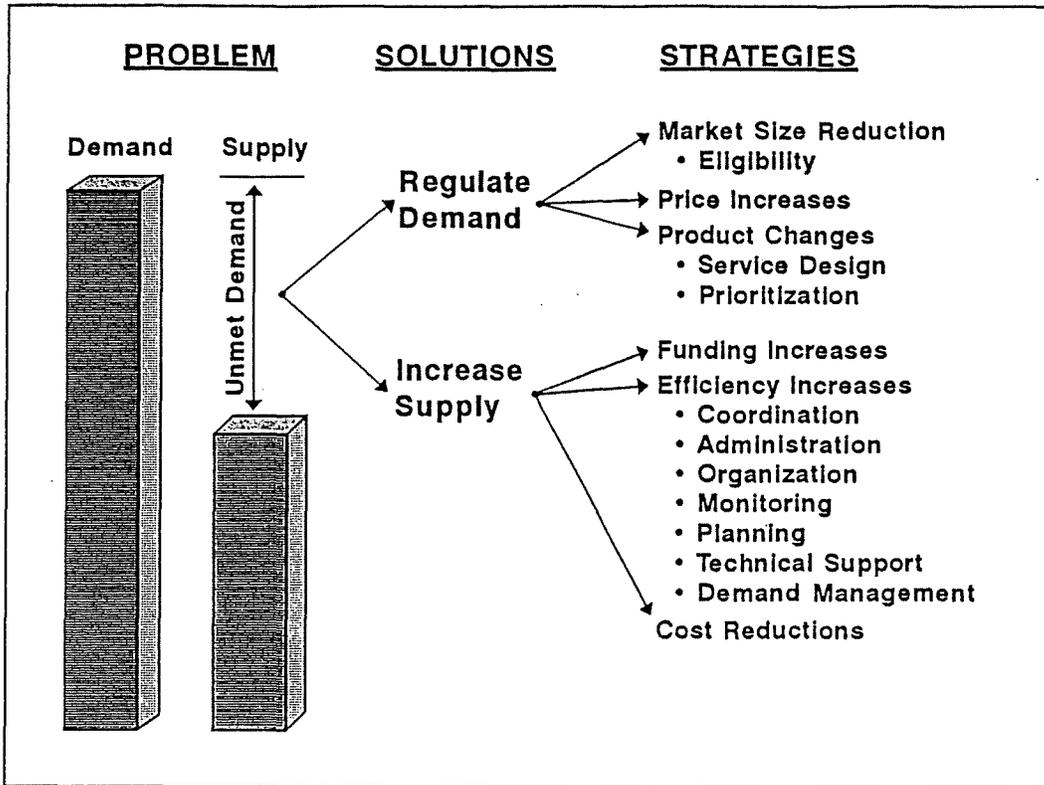


FIGURE ES-1. Strategies for reducing unmet demand.

The demand-side strategies include changing eligibility requirements in order to reduce the market size for these services, increasing prices (i.e., fares) that passengers pay, and changing the characteristics of the product/service (e.g., changing the advance reservation time). The supply-side strategies include increasing funding, increasing the efficiency of services, and reducing the cost of service (e.g., through use of volunteers or through pooling bulk purchases of certain items, such as insurance and equipment).

One of the supply-side strategies, improving efficiency, leads to an increase in the supply of services (and, consequently, a decrease in unmet demand) because resources are used more economically. Efficiency can be improved through coordination, by improving the administration and organizational structure of the coordinated system to eliminate duplicative efforts, through effective planning and technical support, and by implementing a performance evaluation program.

Performance evaluation provides information on the progress of strategies in meeting objectives and goals.

Performance evaluation is an important diagnostic tool used by management to assess the effectiveness and efficiency of an operation and to measure progress toward meeting organizational goals and

objectives. It can also identify areas that require corrective actions when performance does not meet expectations. Performance evaluation also provides funding agencies, elected officials, the general public, and users of the system with a "report card" on performance of the system.

Figure ES-2 shows the six basic steps in the performance evaluation process that is recommended for the commission. The performance evaluation process must have some framework for measuring progress, success, or

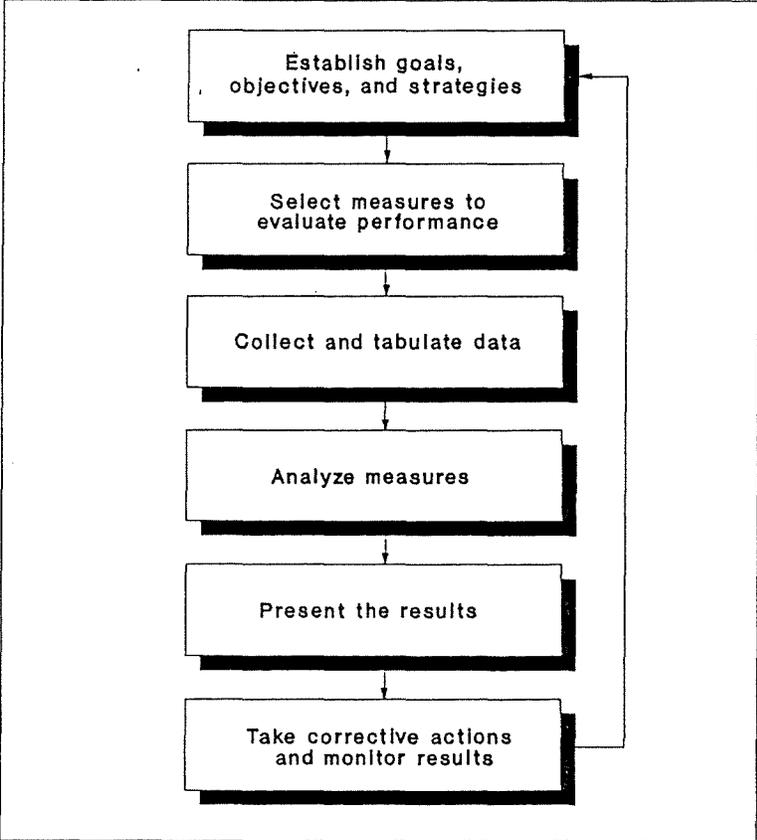


FIGURE ES-2. Performance evaluation process.

EXECUTIVE SUMMARY

achievement. This framework is established through the development of goals, objectives, strategies, tactics, and performance measures. Goals are broad conditions that define, in general terms, what the commission hopes to achieve. Objectives communicate to participants in the coordinated system (e.g., the commission, local coordinators, and operators) what is expected of them, in quantifiable terms. Objectives must be consistent with the established goals so that achievement of the objectives should ultimately result in achievement of the goals. Strategies are actions designed to achieve objectives, while tactics are specific implementable tasks. Performance is evaluated through the use of quantifiable performance measures. These measures provide information to management on the progress of current strategies and tactics in meeting objectives and, ultimately, goals. This information can be used to adjust strategies and tactics, or to change objectives if they are determined to be inappropriate.

Of the six steps in the performance evaluation process, data collection and tabulation is the most time-consuming. Nearly all of the data necessary for these measures are presently collected in some form and at some level (e.g., in annual operating reports, memoranda of agreement, local coordinator financial reports, and driver or dispatcher logs). In the future, as the commission reviews and possibly changes objectives and strategies, data needs may also change.

There are three data analysis methods: time-series, peer group, and comparison to targets.

The analysis of the data is one of the most important steps in the performance evaluation process. Performance measures are usually analyzed by a time-series comparison, by a peer group

comparison, or by comparison to performance targets. A time-series analysis illustrates how performance is changing over time, and at what rate. The second technique, peer group analysis, is used to compare performance of one operator, or local coordinator, with the performance of a group of operators of similar size, operating environment, and modal characteristics. The third type of analysis is a comparison of performance to pre-determined targets. This type of analysis is difficult for specialized transportation services because general standards do not exist. In some cases, however, targets can be established if there is sufficient, accurate historic data.

EXECUTIVE SUMMARY

There are two recommended levels of performance evaluation. The first level involves the evaluation of the commission in its role as the state-level coordinating organization. At the second level, the local coordinators will be evaluated based on the operating performance of the coordinated TD transportation services that operate in their service areas.

For the commission's performance evaluation program, it is recommended that performance be measured using a time-series analysis and an analysis that compares performance to targets. A peer-group analysis is not recommended for the commission evaluation because there are no equivalent state-level coordinated systems similar to Florida's system. It is recommended that the performance evaluation of the local coordinators incorporate peer-group analysis in addition to the time-series analysis and the analysis utilizing performance targets. Many of the performance measures used for the commission and local coordinator evaluations will be the same.

There are five goal areas: availability, efficiency and effectiveness, quality, funding, and accountability.

The goals and objectives of the commission are presented in Table ES-1. There are five areas in which there are established goals: availability, efficiency and effectiveness, quality, funding, and accountability. Each goal

has three or four objectives that communicate the expectations of the coordinated system.

There are only minor differences between the commission's and the local coordinators' goals and objectives because at either the statewide or local level perspective, the commission and local coordinators share common interests in providing transportation services to transportation disadvantaged persons. However, because the roles and responsibilities of the commission are different from those of the local coordinators, there will be differences between the strategies and tactics implemented by the commission and those implemented by the local coordinators. The types of strategies and tactics that the commission would implement involve activities relating to program administration and coordination. Conversely, the strategies and tactics implemented by the local coordinators involve the delivery of service within

EXECUTIVE SUMMARY

Table ES-1. Goals and Objectives.

Goal 1	Ensure availability of service to the transportation disadvantaged.
Objective 1	Promote the provision of services to meet the demand for non-sponsored trips.
Objective 2	Promote the provision of services to meet the demand for sponsored trips.
Objective 3	Support establishment and continuation of TD planning and service delivery systems.
Objective 4	Improve passenger awareness of TD transportation services.
Goal 2	Ensure that service is delivered in the most effective and efficient manner.
Objective 1	Accomplish cost-effective service delivery.
Objective 2	Ensure effective statewide program administration.
Objective 3	Promote optimal utilization of services provided.
Objective 4	Promote utilization of the most cost-effective transportation mode.
Goal 3	Ensure that quality service is attained.
Objective 1	Encourage courteous customer relations and passenger comfort.
Objective 2	Promote service that minimizes customer travel and wait times.
Objective 3	Require the provision of safe and reliable service.
Goal 4	Ensure necessary funding to support the TD program.
Objective 1	Increase total TD funds to meet more of the demand for non-sponsored trips.
Objective 2	Encourage public and private agencies to identify and allocate sufficient transportation disadvantaged funds to meet the transportation needs of their TD clients.
Objective 3	Protect the principle of maintenance-of-effort in program funding.
Goal 5	Ensure program accountability.
Objective 1	Adhere to procedures, rules, and regulations established by the state of Florida.
Objective 2	Carry out legislative mandates.
Objective 3	Promote uniform, accurate, and timely submittals of data and contracts.
Objective 4	Collect, compile, report, and maintain data necessary for evaluation of statewide TD program.

their local service areas. Since the services provided within each of the local coordinators' service areas tend to be unique, strategies and tactics may vary from one local coordinator to the next.

EXECUTIVE SUMMARY

The commission's strategies and performance measures are presented in the technical memorandum. Tactics will be developed by commission staff during preparation of the annual work program. The goals, objectives, and performance measures for the local coordinators are presented in the technical memorandum. These goals and objectives will serve as the basis for communicating the commission's performance expectations of coordinated TD transportation services. Because the local coordinators are responsible for the local delivery of TD transportation services, they are responsible for developing and implementing service delivery strategies and tactics that will result in their meeting the expectations expressed by the commission in the local coordinators' goals and objectives.

The goals and objectives should be reviewed annually by the commission and modified as changing conditions may warrant. Progress toward meeting the objectives should be measured and reported annually as part of the commission's annual report and operating status report.

The action plan illustrates the recommended focus of commission activity over the next five years.

The action plan outlines the specific strategies to be undertaken by the commission. It is important to stress that program strategies may change over time as market conditions

change and as the commission continually evaluates its performance. The plan consists of: (1) actions that are recommended for implementation during the first year of the five-year plan, (2) ongoing actions to be undertaken in subsequent years, and (3) actions to be included in the commission annual work programs as funds and staffing permit. It should be noted that the listed actions are selected from the extensive list of strategies recommended in the technical memorandum. The actions presented in Table ES-2 require either policy decisions or significant planning and management activities and illustrate the recommended focus of commission activity over the next five years.

EXECUTIVE SUMMARY

Table ES-2. Action Plan for the Transportation Disadvantaged Commission.

Actions for first year.
<ul style="list-style-type: none">• Develop strategy to reduce unmet demand.<ul style="list-style-type: none">• review current practices for implementing Chapter 427 eligibility guidelines.• recommend procedures for use in local areas to ensure that the most needed trips are programmed for delivery.• consider other strategies to regulate demand and increase supply.• Develop procedures for implementing Chapter 427 eligibility guidelines.• Collect data needed for local coordinator performance evaluation.• Initiate procedures to collect data for commission performance evaluation.
Actions for each subsequent year.
<ul style="list-style-type: none">• Review goals and objectives.• Review strategies.• Conduct commission and local coordinator performance evaluations.• Participate in state comprehensive planning and transportation planning processes.• Develop and implement marketing/outreach programs.• Monitor the impacts of ADA implementation by mass transit on demand for TD transportation services.
Actions to be included as funds and staffing permit.
<ul style="list-style-type: none">• Evaluate cost-effectiveness of different provider network types (e.g., brokered, single-provider, and multi-provider).• Periodically identify unmet demand.• Identify number of trips provided outside of the coordinated system.• Implement insurance cost containment program.• Continue to develop marketing programs to encourage volunteerism.• Check for duplication of effort among state and local planning staff, and reduce duplication where appropriate.• Assist local coordinators in efforts to improve vehicle reservation and scheduling functions.• Develop standard procedures for handling trip requests that consider all modes and relevant costs.• Assist in developing local fare structures.• Identify training needs and develop appropriate training programs.

As indicated by the analysis presented in previous technical memoranda, there is a significant amount of unmet demand for TD transportation services. There are a number of demand-side and supply-side strategies that may be effective in reducing unmet demand. One strategy involves the implementation of a performance evaluation process in order to improve system efficiency. The process must have some framework for measuring progress, success, or achievement. This framework is established through the development of goals, objectives, strategies, tactics, and performance measures. Five goals have been developed for the commission that cover the areas of service availability, service efficiency and effectiveness, service quality, program funding, and program accountability.

An action plan is proposed that outlines specific strategies to be undertaken by the commission. The action plan and the rest of the five-year plan should be viewed as part of a dynamic, continuing planning process. This process should include annual performance evaluations of the state TD coordinated system, annual reviews of the commission's goals and objectives, and continual reviews of the commission's strategies and action plan.