



# Public Participation Plan

Washington Metropolitan Area Transit Authority Title VI Program

2014-2017

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## Glossary

*(Note: Many definitions are taken or adapted from Nebraska Department of Road's Title VI Implementation Plan, January 2013)*

**ADA:** The Americans with Disabilities Act prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation.

**ASL:** American Sign Language

**Brand:** A unique brand (including a logo and tagline) briefly and effectively tells the public what they can expect from a company, agency or individual campaign.

**Civil Rights:** Civil Rights are a class of rights and freedoms that protect individuals from unwarranted action by government and private organizations and individuals and ensure one's ability to participate in the civil and political life of the state without discrimination or repression.

**Community-Based Organization (CBO):** Community Based Organizations are non-profit, neighborhood, community, ethnic, or business association groups that support provide support and services to the community and businesses, through services that may include health, educational, employment training, business formation support and assistance, community building, and other social welfare services.

**CBO Meeting:** Meetings with the clients and/or staff of CBOs are generally not open to the public, but rather are used to get or give information to the groups that use services provided by the CBO.

**Community Meeting/Workshop:** Community meetings are formal or informal opportunities for staff to receive public feedback in an interactive setting. They are held in a public space and open to the general public, although individuals or groups may be specifically invited. Community meeting formats include workshops, charrettes, and open houses.

**Electronic Voting:** Electronic voting at public events allows participants to interact with presentations, give feedback, and spur discussion using small portable keypads.

**Federal Transit Administration (FTA):** The Federal Transit Administration (FTA) is an agency within the United States Department of Transportation that provides financial and technical assistance to local public transit systems.

**FTA Circular 4702.1B:** FTA's revised circular provides guidance to grantees on how to comply with Title VI regulations. Specifically, it directs them to:

- Ensure that the level and quality of public transportation service is provided in a nondiscriminatory manner;
- Promote full and fair participation in public transportation decision-making without regard to race, color, or national origin;
- Ensure meaningful access to transit-related programs and activities by persons with limited English proficiency.



**Focus Groups:** Focus groups are designed to provide a comfortable space for guided, thoughtful small group discussion on a specific topic.

**Limited English Proficiency (LEP) (Executive Order 13166):** This Executive Order requires Federal agencies to examine the services they provide, identify any need for services to those with limited English proficiency (LEP), and develop and implement a system to provide those services so LEP persons can have meaningful access to them.

**Low-income:** Households which earn less than \$30,000 a year.

**MetroView:** WMATA's internal GIS system containing minority status, income level, and LEP information taken from the Census.

**Minority:** A person who is a citizen or lawful permanent resident of the United States and who is:

- Black: a person having origins in any of the black racial groups of Africa,
- Hispanic: a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race,
- Asian or Pacific Islander: a person having origins in any of the original peoples of the Far East, Southeast Asia, Indian Subcontinent, or the Pacific Islands,
- American Indian or Alaskan Native: a person having origins in any of the original peoples of North American, and who maintain cultural identification through tribal affiliation or community recognition.

**National Environmental Policy Act (NEPA):** NEPA is a United State environmental law that established a U.S. national policy promoting the enhancement of the environment and also established the President's Council on Environmental Quality.

**Online Outreach:** Online outreach provides a forum to both inform the public about an initiative and solicit public feedback. Online outreach includes surveys on WMATA websites, or other web-based discussion platforms such as MindMixer, MetroQuest, Userveice, and IdeaScale.

**Pop-Up Events:** Pop-up events are designed to provide the feeling of an "instant" outreach program. They are located where people are, rather than requesting that they come to a meeting. Pop-up event locations include festivals, shopping centers, and transit stations.

**Public Hearing:** Public hearings must be held whenever a transit agency proposes a change in any fare or rate, implements a major service reduction, adopts a mass transit plan, or for any capital improvements governed by the National Environmental Policy Act (NEPA), as required by federal law.

**Public Participation Plan (PPP):** Recipients of Federal Transit Administration (FTA) funding must submit a plan that details strategies to engage minority and limited English proficient (LEP) populations in its planning and programming activities. These efforts may be part of a broader framework that also includes outreach strategies for other traditionally underserved constituencies, such as people with disabilities and low-income populations.

**Street Team:** Street teams are for-hire staff used to provide support at pop-up events or other outreach activities that require a high volume of communication with the public.



**Wayfinding:** Wayfinding systems are navigational systems (such as signs and maps) that help people determine where they are and where they need to go to reach a destination.

**WMATA Project Specialist:** is a WMATA staff person who works in one of the emphasis programs or key personnel who is knowledgeable in that discipline.



# Chapter 1 – Executive Summary

## Background

This Public Participation Plan (PPP) has been prepared to: expand the Washington Metropolitan Area Transit Authority's (WMATA) outreach; support two-way dialogue with customers; supplement customer research feedback; provide non-customer input into decision-making; and fulfill the obligations under Title VI of the Civil Rights Act of 1964, which states that "no person in the United States shall, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance."<sup>1</sup> In accordance with federal guidelines, WMATA must submit to the Federal Transit Administration (FTA) a PPP that details the Authority's plans and strategies to engage minority and Limited English Proficient (LEP) populations in its planning and programming activities.

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*These efforts may be part of a broader framework that also includes outreach strategies for other traditionally underserved constituencies, such as people with disabilities and low-income populations.*

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As a recipient of federal funds and per Title VI of the Civil Rights Act of 1964 and its implementing regulations,<sup>2</sup> FTA directs WMATA to:

- Ensure that the level and quality of public transportation service is provided in a nondiscriminatory manner;
- Promote full and fair participation in public transportation decision-making without regard to race, color, or national origin;
- Ensure meaningful access to transit-related programs and activities by persons with limited English proficiency.<sup>3</sup>

The FTA requires that public transit providers create a PPP that describes both the proactive strategies the Authority will use to engage minority and LEP populations and the desired outcomes of this outreach. This plan can be part of a broader public participation strategy that also targets other traditionally underserved communities, including low-income populations and people with disabilities.

By developing and utilizing strategies that improve the accessibility of WMATA's outreach for those groups that have a number of constraints and barriers that limit participation, the accessibility of outreach for all persons, regardless of minority status, income level, or the ability to speak English, will

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<sup>1</sup> 42 USC Section 200d

<sup>2</sup> FTA C 4702.1B

<sup>3</sup> FTA C 4702.1B



improve. Public participation activities will be designed to be accessible to all persons, and planned through a single, inclusive process.

## Developing the Plan

WMATA's PPP was developed through a year-long, multi-step process and led by a cross-departmental team with representation from offices and departments that currently lead public outreach activities. It establishes four thematic goals for agency-wide public participation: Inclusiveness, Collaboration, Responsiveness, and Consistency. It is against these goals that public participation outcomes will be measured. Figure 1 elaborates on these goals.

**Figure 1 Public Participation Plan (PPP) Goals**



**Inclusive**

**Actively facilitate the involvement of all communities that may be affected in the public participation process, including those that are traditionally hard to reach, through culturally sensitive methods.**



**Collaborative**

**Work jointly with the community throughout the planning and project development process.**



**Responsive**

**Proactively link public feedback to outcomes in order to build trust.**



**Consistent**

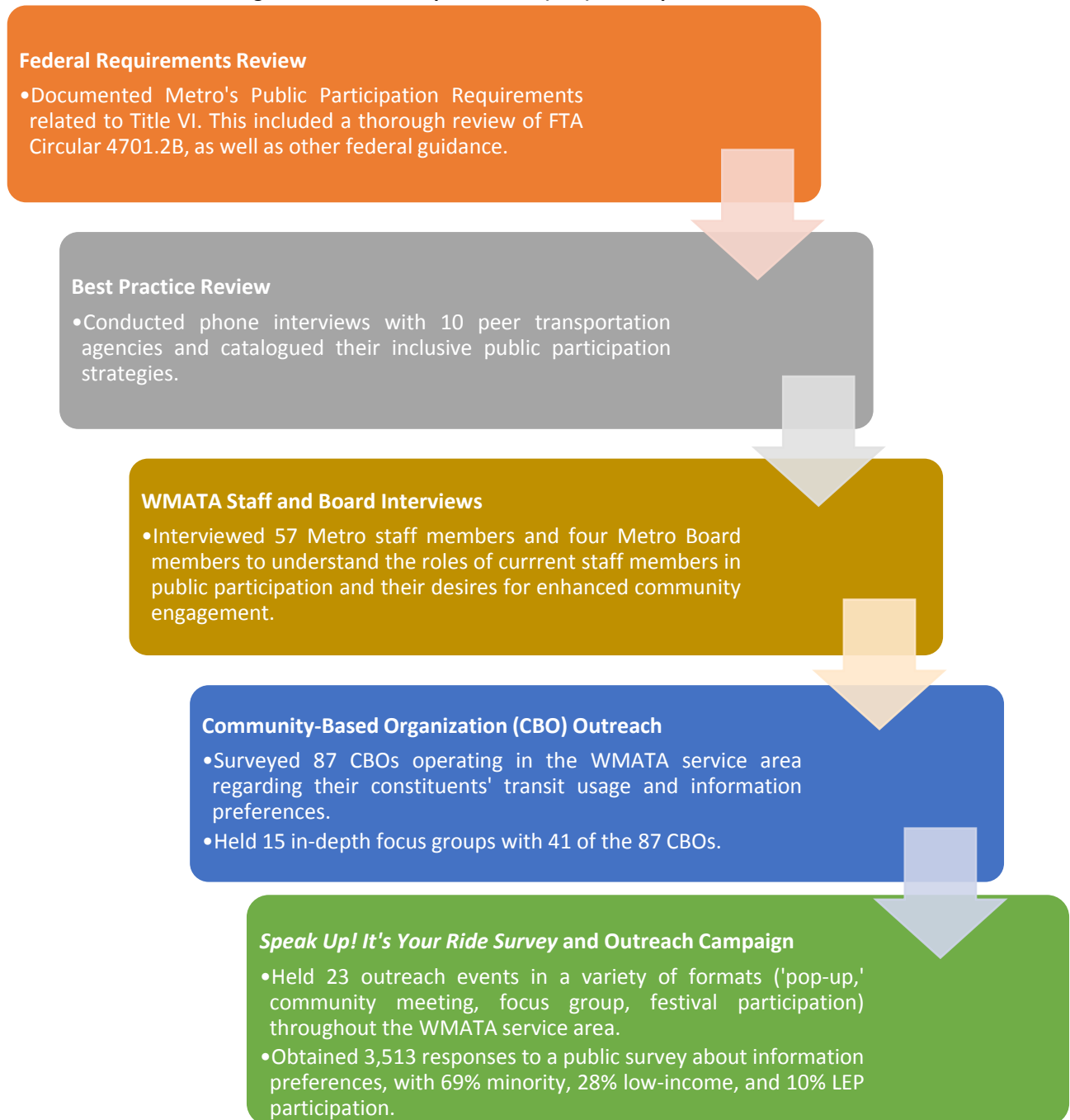
**Ensure established guidelines from the PPP are followed throughout WMATA.**

There are a number of planning and programming activities WMATA undertakes that will activate the PPP. These include: planning projects, selection of amenities and infrastructure, environmental analyses, service changes, public information campaigns and development of policy alternatives – such as fare changes. The PPP has been designed to identify strategies that can be employed for each of these project types, while recognizing that different approaches and attention may be required depending upon the constituencies affected by these actions.

The PPP development process included five major activities designed to identify industry best practices in this area, as well as public preferences regarding outreach and engagement specific to the WMATA service area. WMATA staff and Board of Director interviews provided a comprehensive look at public participation practices at the agency today, as well as ideas for future practices. Figure 2 summarizes these activities.

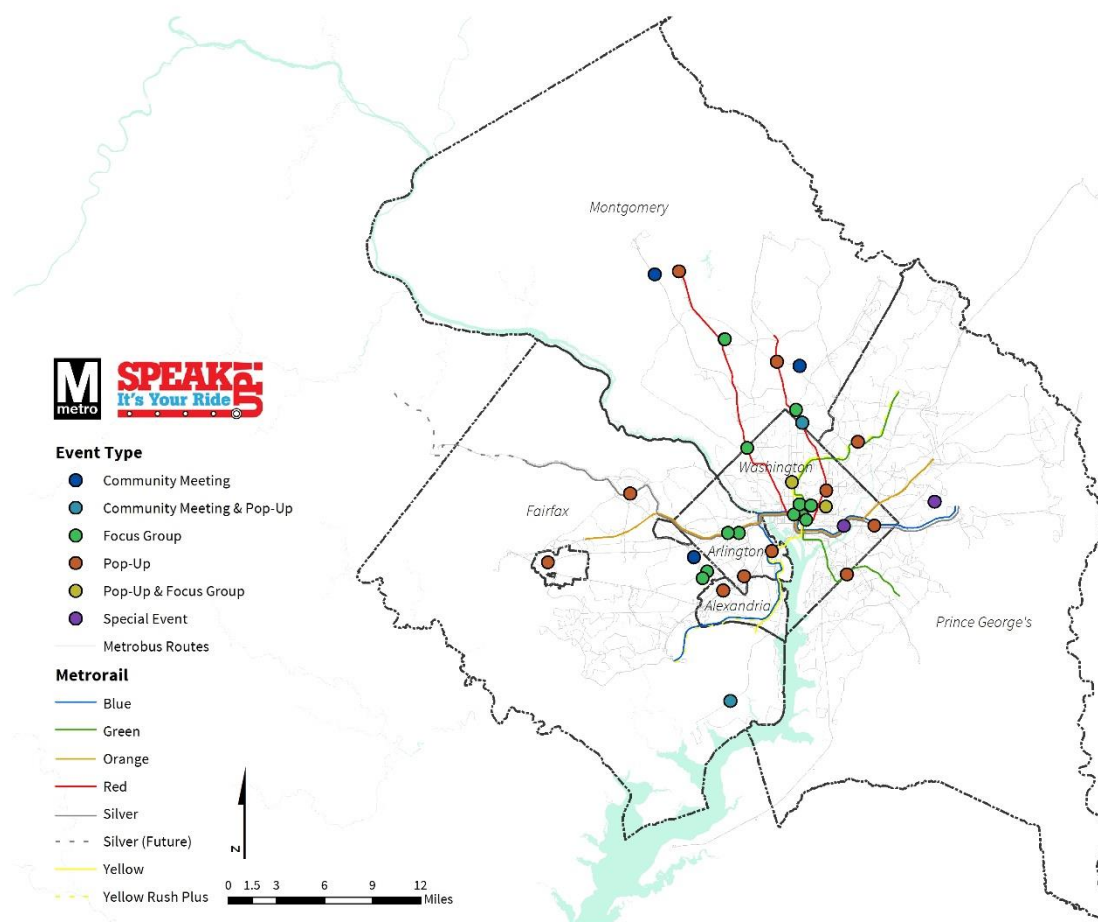
At the heart of the project was a robust and multi-faceted public outreach campaign – *Speak Up! It's Your Ride* - designed to obtain information about communications and public participation preferences from diverse groups in the WMATA service area. Audiences included many minority, immigrant, and ethnic groups, the disability community, seniors, the homeless, and the economically disadvantaged.



**Figure 2 Public Participation Plan (PPP) Development Process**

The campaign encompassed 38 outreach events in the WMATA service area occurring over the course of three months from February through April 2014. It included 15 in-depth focus groups with 41 Community-Based Organizations (CBOs) and 23 public outreach events ranging in size and focus. Figure 3 shows the location and event type for the 23 Speak Up! events and the 15 focus group meetings where WMATA staff met with CBOs and their constituents.<sup>4</sup>

**Figure 3 *Speak Up! It's Your Ride* Outreach Event Locations**



### *Speak Up! It's Your Ride* Survey

To capture information from participants about the methods of engagement that work best for them, the project included a survey administered at all events and available on-line. Surveys were generally administered on tablet computers, though some groups used paper versions, and were translated into the seven major non-English languages spoken in the WMATA service area. In total, 1,726 surveys were

<sup>4</sup> Two locations were used to hold both a *Speak Up! It's Your Ride* Survey event and a focus group meeting.

completed at *Speak Up! It's Your Ride* events; an additional 1,787 surveys were taken online. Of the respondents, 69% were minorities, 28% were low-income, and 10% were LEP.

The information collected from the outreach to the general public and from CBOs was used to inform the outreach strategies in the PPP to ensure that WMATA's public outreach efforts are inclusive and accessible for all. The results of the *Speak Up! It's Your Ride* campaign provided insights about the following:

- Strategies CBOs use to reach their clients/constituents, and their perspectives about collaborating with WMATA;
- Communication and feedback preferences from 3,513 survey respondents; and
- Successes and challenges for each outreach event.

The next sections detail some of the key findings from the public outreach campaign and from peer, WMATA staff, and Board interviews.

## Key Findings

### *Customer Preferences*

The extensive outreach conducted identified the following customer preferences that can be implemented to engage all populations, including minority, low-income, and LEP in WMATA's public events:

- *To involve Title VI populations, go where they are.* Just 10 percent of individuals who participated in the PPP's outreach had ever been to a WMATA public meeting. Holding events where minority, low-income, and LEP population are — at transit centers, CBOs, shopping centers, and festivals — is the most effective method for reaching these populations.
- *Demonstrate cultural sensitivity.* Know your audience and bring the appropriate WMATA staff (subject matter, cultural, and linguistic expertise) to events and meetings.
- *Make it convenient to attend events.* When asked what would make it easier to attend a meeting, all demographic and cultural groups except LEP populations chose the same top three options: location near work or home, convenient time of day, and near public transportation. LEP groups choose the use of interpreters instead of convenient time of day. Asian/Pacific Islanders, low-income, and LEP participants expressed a preference for meeting on weekends, instead of during the week.
- *Tailor event formats to the preferences of groups whose input is sought.* Meeting formats should be tailored to the preferences of individual groups or communities. White/Caucasian, Hispanic, and Asian/Pacific Islander survey respondents all indicated "Question and Answer Session" as their most preferred meeting format; Black/African American respondents selected "Show of Hands Voting." Electronic voting at events did not work well with senior citizens. All demographic and cultural groups selected surveys, open discussions, and question and answer sessions highly as preferred meeting formats.



- *Translate materials and use graphics.* Informational materials should be available in the target population's native language and should be designed with graphics and minimal text.
- *Use ethnic media and distribution outlets.* Materials should be distributed through ethnic/racial media outlets and to locations that many riders frequent, including on the bus (*Black/African American, Hispanic, low-income, and LEP preference*), at bus stops, and at Metrorail Stations (*all races, LEP and low-income populations*). Materials should also be distributed to locations that are not necessarily transit related, such as CBOs, libraries, grocery stores, and residences.
- *Newspaper advertising still works.* All races, low-income, and LEP respondents most often chose newspapers as a preferred way to receive community information; low-income and LEP respondents were far less likely to hear about events via the internet.
- *Include children.* Providing activities for children allows parents to attend and to be attentive.
- *Acknowledge and use input.* It should be explicitly evident how the public input will be used in decision making.

### *Peer, Staff and Board Interviews*

Below are select recommendations from Staff and Board of Director interviews and the best practices review:

- *Establish an institutional framework for public participation that includes a lead department.* Generally, there should be a department that is specifically tasked with overseeing public participation and/or a process that facilitates the involvement of several departments.
- *Work with CBOs to build relationships and trust across diverse populations.* CBOs are nonprofit groups that support local communities and are among the most effective resources available to a transit agency for facilitating the frequent contact that is needed to build trust and mutually beneficial relationships. Many of the peer agencies have established CBO partnership committees to help develop and implement broad-based public involvement.
- *Meet people where they are.* Peer agencies and staff stressed the need to “meet people where they are” rather than to expect riders and other members of the public to attend agency meetings and to structure participation activities to be as inclusive as possible.
- *Use a variety of tactics to get the word out.* While getting the word out through CBOs was universal, many agencies employed other techniques as well, such as using student report card distribution times to get information to families, door-to-door outreach in targeted areas, use of ethnic media, etc. WMATA staff has experienced success using some of these techniques in their more recent public outreach.
- *Use technology appropriately.* Several of the agencies interviewed feel that, while it has its place in public participation, technology should supplement other forms of outreach. Technology was effective when used with online surveys, webinars, or for platforms like MindMixer.
- *Use a recurring public forum.* Staff suggested the creation of a recurring forum to allow members of the public to provide feedback to WMATA regarding issues of concern to them. This feedback will supplement existing opportunities to comment on specific projects, proposals, and plans.



## Recommendations

Per FTA requirements for the PPP, WMATA identified proactive strategies that engage minority, low-income, and LEP communities; created a process and set of procedures that will facilitate inclusive participation; and developed a set of performance measures that will track whether the agency is reaching its desired outcomes.

The PPP includes recommended strategies to ensure that WMATA's public participation activities are effective, efficient, and compliant with federal requirements for inclusive public participation. These strategies were developed from information gathered during the PPP development process. WMATA will be accountable to the FTA for ensuring that the procedural strategies adopted by the Authority in the PPP are successfully implemented.

### Strategy 1: Public Participation Toolkit and Project Communications/Outreach Plan

Using customer preference information gathered in the *Speak Up! It's Your Ride* Campaign, staff interviews, and peer agency best practices, WMATA designed a toolkit to help project managers plan effective outreach. The centerpiece of the Toolkit is the Project Communications/Outreach Plan (PCOP). Every WMATA project will use the PCOP to plan public participation activities. The PCOP includes matrices that will enable staff to select events, venues, media, and other activities that will effectively reach target populations for a particular project. The Toolkit also includes population-specific media outreach lists, a CBO database, and a comprehensive list of annual festivals and other events in WMATA's service area.

WMATA will establish a CBO Outreach Committee as a way of collaborating with local CBOs to develop strategies that are tailored to specific project proposals, to ensure meaningful, broad-based public participation, and to build a new avenue for knowledge transfer between WMATA and the CBOs. The Committee membership will be a cross-section of the service area both geographically and by type of CBO.

### Strategy 2: Performance Measures

Performance measure data that focuses on participant demographics, participant feedback, and participant follow-up will be collected for each public participation project. An annual performance report will aggregate measures from the individual project and the results of an annual survey of CBOs. The annual performance report will provide an overview of outreach activities throughout the year, identifying practices or locations that were successful, and drawing conclusions for future outreach based on lessons learned.

### Strategy 3: Public Participation Training



To ensure the successful, uniform adoption of the Toolkit and an Authority-wide understanding of Title VI requirements for public participation, WMATA staff involved in public outreach will be required to use the Toolkit and will receive training on the use of the Toolkit and the PPP.

*Strategy 4: Centralized Public Participation Office*

In addition to the Toolkit, the PPP recommends that WMATA establish a centralized office to manage public outreach. The Office of External Relations (EREL) will be tasked with providing expert assistance to project/planning staff for their individual projects. Additionally, the office will manage all project-based public participation activities, as well as provide oversight and coordination for public participation within WMATA. EREL will ensure consistency across the Authority, quality control of communications and outreach materials, coordination with Marketing around advertising, and PPP plan compliance. The Office of Equal Employment Opportunity (OEEEO) will be tasked with additional functions related to managing relationships and outreach with CBOs.

## Conclusion

WMATA's PPP is a comprehensive document that includes articulated and attainable goals, tested local strategies, internal organizational and procedural strategies, and detailed guidelines for executing inclusive, consistent, collaborative, and responsive public outreach. In creating this plan, WMATA set out not only to be compliant with FTA requirements, but also to become a leader in progressive public participation. The PCOP and Toolkit and procedural strategies outlined in the PPP, will result in a more efficient and effective system of public participation that yields inclusive and meaningful public input by all groups in the community that WMATA serves, regardless of their socio-economic status, minority status, or ability to speak English.



*Speak Up! It's Your Ride* Outreach Pop-Up Event at  
DC USA Mall



## Chapter 2 – Introduction and Guiding Principles

Chapter 2 provides the reader with information on the purpose of the Public Participation Plan and the federal requirements that the Washington Metropolitan Transit Authority (WMATA) and other transit agencies must follow under Title VI of the Civil Rights Act of 1964 as well as other related federal requirements. This chapter includes an overview of WMATA operations and services as well as the demographic profile of our service area, highlighting the populations that are protected under Title VI.

The chapter also includes a brief description of the process WMATA followed in the development of our Public Participation Plan as well as the themes, goals, and objectives that guide this document and WMATA's approach to public outreach.

### Summary of Key Findings

Chapter 2 includes the following key pieces of information on the requirements, setting, and approach to the Public Participation Plan (PPP):

- **WMATA views the development of the PPP as a foundation for improving the process and outcomes for ALL public participation activities conducted by the Authority.**
- WMATA must submit to the Federal Transit Administration (FTA) a Public Participation Plan (PPP) that details the Authority's plans and strategies to engage minority and limited English proficient (LEP) populations in its planning and programming activities.
- The Authority chose to invest the time and resources to conduct additional research and outreach to gather the information necessary to create a PPP that not only fulfilled the federal requirements, but also exceeded those requirements and expectations.
- WMATA's vision for public participation and this plan is that activities will be conducted through a reasonable, inclusive, and collaborative process that seeks to gain rider and non-rider input into WMATA decision-making about its policies and services.



## Purpose and Federal Requirements

This Public Participation Plan (PPP) has been prepared to expand the Washington Metropolitan Area Transit Authority's (WMATA) outreach and two way dialogue with customers, supplement customer research feedback to provide non-customer input into decision-making, and fulfill the obligations under Title VI of the Civil Rights Act of 1964, which states that “no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance.”<sup>5</sup> In accordance with federal guidelines, WMATA must submit to the Federal Transit Administration (FTA) a Public Participation Plan that details the Authority's plans and strategies to engage minority and limited English proficient (LEP) populations in its planning and programming activities.

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*These efforts may be part of a broader framework that also includes outreach strategies for other traditionally underserved constituencies, such as people with disabilities and low-income populations.*

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As a recipient of federal funds and per Title VI of the Civil Rights Act of 1964 and its implementing regulations,<sup>6</sup> FTA directs WMATA to:

- Ensure that the level and quality of public transportation service is provided in a nondiscriminatory manner;
- Promote full and fair participation in public transportation decision-making without regard to race, color, or national origin;
- Ensure meaningful access to transit-related programs and activities by persons with limited English proficiency.<sup>7</sup>

Appendix E - Federal Requirements Review contains detailed information about the federal requirements related to Title VI and public participation that are applicable to WMATA.

FTA recipients have “wide latitude” to decide “how, when, and how often specific public participation activities should take place,” but these determinations should be supported by demographic analysis and the results of input (e.g., outreach and qualitative research) received through the development of the public participation plan.<sup>8</sup>

FTA's Circular 4702.1B “Title VI Requirements and Guidelines for Federal Transit Administration Recipients”<sup>9</sup> (Circular) is the primary source of federal requirements and guidance for Title VI compliance, but it is not the only federal regulation that provides guidance on full, fair, and meaningful

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<sup>5</sup> 42 USC Section 200d

<sup>6</sup> FTA C 4702.1B

<sup>7</sup> FTA C 4702.1B

<sup>8</sup> FTA C 4702.1B

<sup>9</sup> FTA C 4702.1B



public outreach. Recipients of FTA urbanized area formula grants also must provide opportunities for public hearings and make information available to the public.<sup>10</sup> FTA and the U.S. Department of Transportation (USDOT) also direct transit agencies to incorporate environmental justice principles into their planning, projects and activities to prevent disproportionately high adverse effects on minority and low-income populations. The USDOT, like other federal agencies, requires public involvement in environmental review processes under the National Environmental Policy Act (NEPA).<sup>11</sup> Though this plan has been developed to satisfy the Title VI requirement, its framework is designed to be applied to all Authority outreach efforts, whether “required” or not.

By developing and utilizing strategies that improve the accessibility of WMATA’s outreach for those groups with constraints and/or barriers that may limit their participation, the accessibility of outreach for all persons, regardless of minority status, income level, or the ability to speak English, will improve. Public participation activities will be designed to be accessible to all persons. They will be planned through a single process – the process for planning inclusive public participation is not a separate process from planning for all public participation activities.

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*While the PPP was prepared to meet federal requirements and ensure the inclusive participation of traditionally underserved constituencies, WMATA also views the development of this PPP as a foundation for improving the process and outcomes for all public participation activities conducted by the Authority.*

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## WMATA Overview

WMATA is the regional transit agency for the Washington, D.C. metropolitan area. WMATA is an interstate compact agency created in 1967 by the District of Columbia, the State of Maryland and the Commonwealth of Virginia. WMATA’s transit service area includes: Washington, D.C.; the cities of Alexandria, Fairfax and Falls Church and the counties of Arlington and Fairfax in Virginia; and Montgomery and Prince George’s Counties in Maryland. WMATA owns and operates both rail and bus service in the compact jurisdictions. Some jurisdictions operate supplementary local bus service. WMATA is governed by a Board of Directors comprised of eight voting and eight alternate directors. Maryland, the District of Columbia, Virginia, and the federal government appoint two voting and two alternate directors each.

WMATA operates the second largest heavy rail transit system, sixth largest bus network, and fifth largest paratransit service in the United States. In FY2013, Metrorail carried almost 209 million trips; Metrobus carried about 132 million trips; and MetroAccess, WMATA’s paratransit service, carried about 2 million trips.

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<sup>10</sup> 49 USC §5307

<sup>11</sup> 42 USC §4331



### *Demographics*

Understanding the nature and extent of Title VI protected populations within WMATA's service area provides context for a culturally-sensitive, customized approach to outreach. The demographic analysis provided here will assist WMATA with its outreach to Title VI populations when conducting projects in a given geographic area or when targeting outreach towards a given ethnic community.

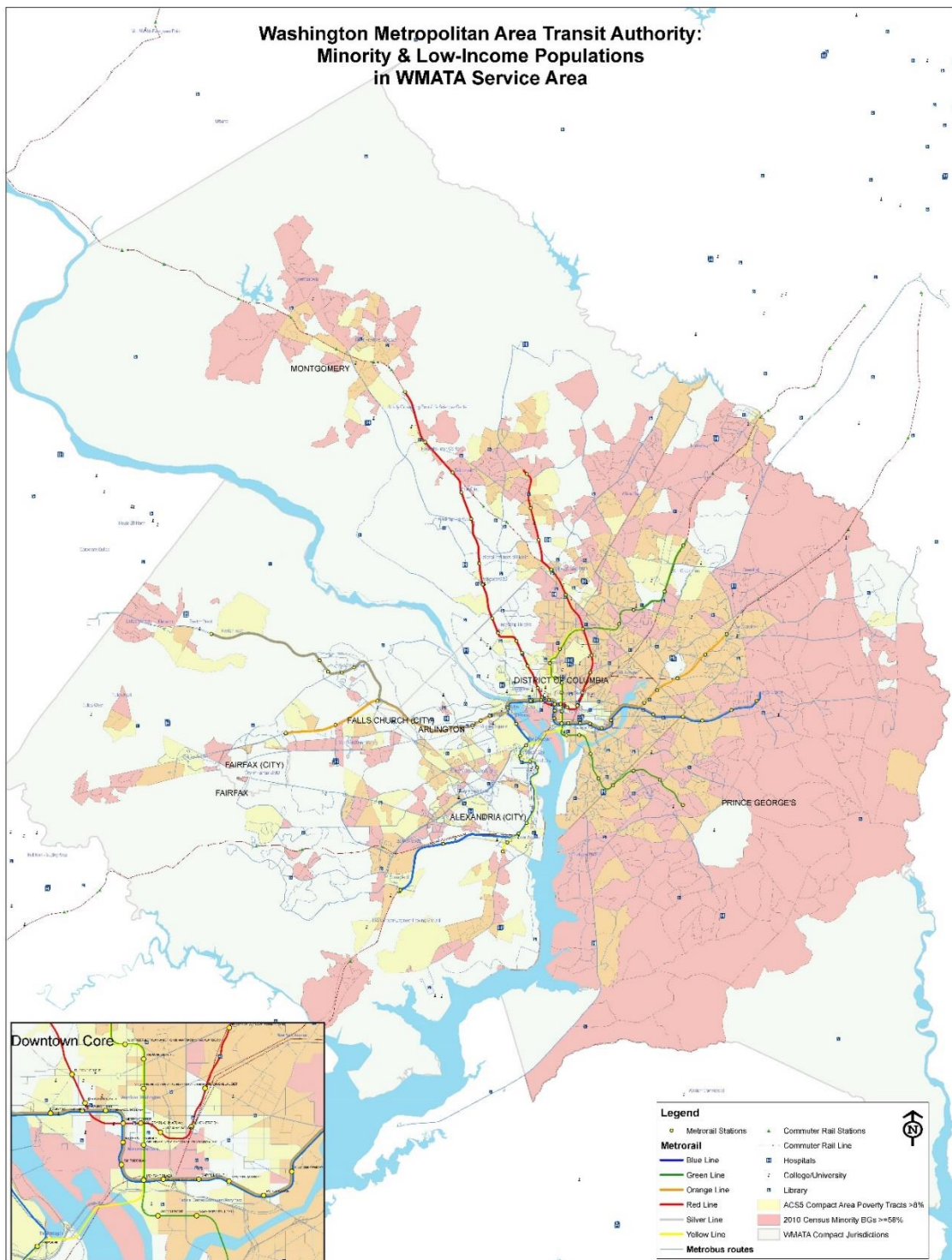
WMATA serves a population of 3.9 million in a 1,500 square-mile service area. The demographic profile of the WMATA service area is 58 percent minority, and 8 percent of the households in the service area are at or below the poverty thresholds.<sup>12</sup> Figures 4 and 5 show the distribution of minority and low-income households, respectively, in the WMATA service area. These populations are not distributed equally; the greatest concentration of minority populations is in the NE and SE quadrants of District of Columbia and in adjoining parts of Prince George's County. There also are significant minority populations in northern Montgomery County and northern Silver Spring. In Virginia, minority populations are concentrated in South Arlington, the west end of the City of Alexandria, Central Fairfax County, South Fairfax County, and in the Herndon and Reston communities in West Fairfax County. The highest concentrations of low-income households are in the NE and SE quadrants of the District of Columbia. There also are high concentrations of low-income households in Prince George's County and in the eastern part of Montgomery County and in the cities of Gaithersburg and Germantown.

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<sup>12</sup>WMATA's service area profile uses the household poverty thresholds set by the U.S. Department of Health and Human Services. WMATA's ridership profile defines a low-income household as one that earns \$30,000 or less as an annual household income. The market research conducted to identify low-income bus routes, bus transfer centers, Metrorail stations, and neighborhoods used \$30,000 as a low-income threshold.



Figure 4 Minority and Low Income Populations in the WMATA Service Area



*Limited English Proficient (LEP) Populations*

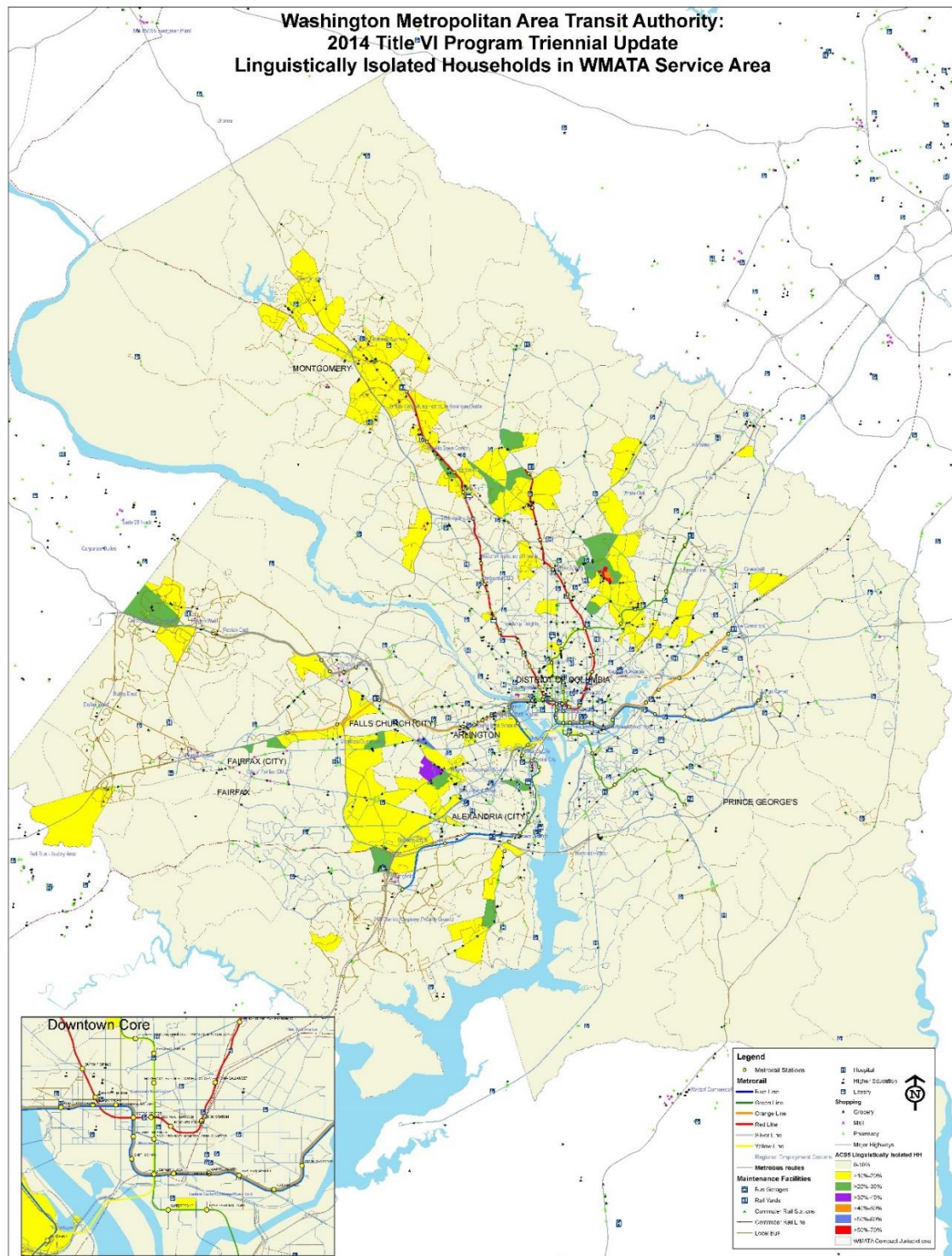
WMATA serves diverse populations, including some that speak limited English (see Figure 5). Approximately 11.5 percent of the population five years of age and older in the service area is limited English proficient (LEP).<sup>13</sup> Northern Virginia and Montgomery County are home to the highest concentration of LEP populations (calculated as a percentage of households in census tracts).

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<sup>13</sup> 2008-2012 American Community Survey 5-Year Estimates, Table B16001. Limited English Proficient (LEP) is defined as population five years of age and older who speak a language other than English at home and who consider that they speak English less than “very well.”



Figure 5 Limited English Proficient Population in the WMATA Service Area



The following eight languages are the most commonly spoken among LEP households in WMATA's service area: Arabic, African Languages (including Amharic and Twi), Chinese, French, Korean, Spanish, Tagalog, and Vietnamese. As shown in Table 1, Spanish-speaking households make up 60 percent of the total LEP households in WMATA's service area. These Spanish-speaking LEP populations are distributed throughout the entire service area.

**Table 1 Linguistic Profile of the WMATA Service Area**

Language Group	Count of LEP Population	Percent of Total LEP Population
<b>Spanish</b>	211,675	60%
<b>Mandarin Chinese</b>	31,067	9%
<b>Korean</b>	30,488	9%
<b>Vietnamese</b>	24,043	7%
<b>African Languages</b>	23,865	7%
<b>French</b>	11,350	3%
<b>Tagalog</b>	9,111	3%
<b>Arabic</b>	8,390	2%

At 9 percent each, Chinese and Korean are the next most common LEP languages. Chinese-speaking LEP populations are spread throughout the western part of Montgomery County and also have concentrations around Greenbelt. In Virginia, Chinese-speaking LEP populations are concentrated around the VA-7 corridor through Fairfax County, and also near Oakton and Reston. There are high concentrations of Korean-speaking LEP populations in Montgomery County near Glenmont, Colesville, and Aspen Hill. In Virginia, there are heavy concentrations of Korean-speaking LEP populations in the City of Fairfax, south through Kings Park West, and east through Annandale. In Prince George's County, the Korean-speaking LEP populations are concentrated near Bowie and the surrounding area.

Vietnamese and African language speakers each represent seven percent of the LEP populations in the WMATA service area. The largest Vietnamese-speaking LEP populations reside in Fairfax and Arlington Counties and in the cities of Fairfax and Falls Church; in Maryland they reside in northern Montgomery County, specifically Hillandale and White Oak. There are also concentrations of Vietnamese-speaking LEP populations in northeast Prince George's County near South Laurel and Lanham. African language-speaking LEP populations are concentrated in Prince George's County, Montgomery County, and southern Fairfax County. In Montgomery County, this population is concentrated around Poolesville and Glenmont. In Prince George's County, African languages-speaking LEP populations are concentrated near Beltsville and Westphalia. In Virginia, this population is concentrated in Fairfax County near



Newington and Lorton. There are also concentrations in the Brentwood neighborhood of Washington, DC.

French and Tagalog-speakers comprise 3 percent each of the overall LEP population. The French-speaking LEP populations are located in northern and southeastern Montgomery County, the NW quadrant of the District of Columbia, and Arlington County. The Tagalog-speaking LEP populations are concentrated in Montgomery County and in the Oxon Hill area of Prince George's County. There also is a concentration of Tagalog-speaking LEP population in the City of Fairfax and scattered throughout Fairfax County near Fort Belvoir, Lorton, and Laurel Hill. Lastly, 2 percent of the total LEP population speaks Arabic. This population lives in Fairfax County (Lincolnia, Woodburn, Reston), the City of Alexandria, Montgomery County (Laytonsville, Chevy Chase, Friendship Heights), and in the Anacostia neighborhood in the District of Columbia.

**Table 2 Geographic Distribution of LEP Populations in WMATA Service Area**

<b>Native Language Group</b>	<b>Primary Jurisdictions (Specific Areas)</b>
<b>Spanish</b>	<b>All jurisdictions</b>
<b>Chinese</b>	<b>Montgomery County</b> (Damascus, Gaithersburg, Rockville, Silver Spring, Four Corners); <b>Prince George's County</b> (north of Greenbelt); <b>Fairfax County</b> (VA-7 Corridor, Oakton, Reston)
<b>Korean</b>	<b>Montgomery County</b> (Glenmont, Colesville, Aspen Hill); <b>Prince George's County</b> (Bowie); <b>City of Fairfax</b> ; <b>Fairfax County</b> (Centreville, Kings Park West, Annandale)
<b>Vietnamese</b>	<b>Montgomery County</b> (Germantown, Hillandale, and White Oak); <b>Prince George's County</b> (South Laurel, Lanham); <b>Fairfax County</b> ; <b>Arlington County</b> ; <b>City of Fairfax</b> ; <b>City of Falls Church</b>
<b>African Languages</b>	<b>Montgomery County</b> (Poolesville, Ashton-Sandy Spring); <b>Prince George's County</b> (South Laurel, Beltsville, Westphalia); <b>Fairfax County</b> (Newington, Lorton); <b>District of Columbia</b> (Brentwood)
<b>French</b>	<b>Montgomery County</b> (Germantown, Montgomery Village, Olney, Takoma Park, Silver Spring); <b>District of Columbia</b> (Fort Totten, Brookland); <b>Arlington County</b>
<b>Tagalog</b>	<b>Montgomery County</b> (Ashton-Sandy Spring, Colesville, Redland); <b>Prince George's County</b> (Oxon Hill); <b>Arlington County</b> ; <b>Fairfax County</b> (Fort Belvoir, Lorton, Laurel Hill); <b>City of Fairfax</b>
<b>Arabic</b>	<b>Montgomery County</b> (Laytonsville, Chevy Chase, Friendship Heights); <b>Fairfax County</b> (Lincolnia, Woodburn, Reston); <b>City of Alexandria</b> (West End); <b>District of Columbia</b> (Anacostia)

WMATA discovered varied language ability within each language group, particularly across generations. Within some immigrant communities, senior citizens are more likely to have limited English proficiency than young families. There are also varied literacy rates within LEP populations. In addition to limited English proficiency, some LEP populations exhibit low literacy in their native language.



## PPP Development Process

Led by a cross-departmental team, WMATA's PPP was developed through a year-long, multi-step process. While WMATA's previous experience incorporating inclusive public participation strategies provided useful background information, the Authority chose to invest the time and resources needed to conduct additional research and outreach to gather the information necessary to create a PPP that not only fulfilled the requirements of FTA Circular 4702.B but also exceeded those requirements and expectations. This comprehensive Public Participation Plan development process included the following components:

- *A Review of the Federal Requirements* documented all of the federal requirements pertaining to public participation that apply to WMATA. This included a thorough review of FTA Circular 4701.2B requirements, as well as other federal guidance.
- The *Best Practice Review* catalogued inclusive public participation strategies in place at 10 transportation agencies across the country, including large transit agencies that operate in areas similar to the WMATA service area. The Best Practice Review includes the compilation of information on the development and contents of peer agency PPPs.
- *Staff and Board Member Group Interviews* with WMATA offices provided an opportunity to understand current roles in public participation and desires for enhancing community engagement at the Authority. Sixty-one WMATA staff members and four Board members participated in the group interview process.
- Outreach to *Community Based Organizations (CBOs)* serving Title VI and other hard-to-reach populations in the WMATA service area consisted of a phone-based survey and focus groups. Of the 200 survey invitations sent, 87 CBOs completed the survey and 41 of those participated in 15 follow-up, in-person focus groups. The survey asked CBOs about their constituents' transit usage and how the people they serve typically receive information and prefer to engage on subject matter. The focus groups were designed to explore in greater detail how WMATA can best communicate with its CBO constituents. A total of 170 staff members and constituents of community-based organizations participated in the focus groups.
- A general public outreach campaign, *Speak Up! It's Your Ride*, afforded the community at large the opportunity to provide feedback about how WMATA can best solicit their involvement and increase the level of inclusiveness, diversity, and accessibility of public involvement activities. Twenty-three public outreach events, including pop-up events, community meetings, and in-depth group interviews, took place at 20 unique locations in the District of Columbia, Maryland, and Virginia. At each of the pop-up events, participants were asked to complete a general public survey on a tablet that solicited input on public participation preferences. The survey also was available on-line and was emailed to a subset of registered SmarTrip® holders and external stakeholders. In total 1,726 surveys were completed at the *Speak Up!* Events; an additional 1,787 surveys were taken online.



- WMATA's *Rider's Advisory Council* was briefed on the development of the Public Participation Plan and invited to distribute information about the *Speak Up!* Campaign. In addition, the Accessibility Advisory Council (AAC) and the Jurisdictional Coordinating Committee (JCC) were briefed about the PPP and the outreach campaign.


The findings of all of these outreach and research activities form the basis for the recommendations presented in the PPP.

## Guiding Themes, Goals, and Objectives




WMATA's Public Participation Plan is grounded in the principle that public participation activities will be conducted through a reasonable, inclusive, and collaborative process that seeks to gain rider and non-rider input into WMATA decision-making about its policies and services. To that end, WMATA has established four themes that frame an approach to public participation. From those themes, WMATA developed four goals – *broad statements of what the agency hopes to achieve* – and 13 objectives – *specific, measurable statements of what will be done to achieve goals*. These goals and objectives guide both the strategies outlined in Chapter 5 and the performance measures developed in Chapter 6.

WMATA's Public Participation Plan themes, goals, and objectives (shown in Table 3) demonstrate the Authority's philosophy toward, and larger commitment to, public participation, equity, and excellent public service. Going forward, they will provide an accessible guide for all WMATA staff as they embark on engaging the public and collecting and considering the input on transit issues that are best resolved through a public process.

**Table 3 Public Participation Themes, Goals, and Objectives**

Theme	Goal & Objectives
 <b>Inclusive</b>	<p><b>Actively facilitate the involvement of all communities that may be affected in the public participation process, including those that are traditionally hard to reach, through culturally sensitive methods.</b></p> <ul style="list-style-type: none"> <li>• Provide materials and translation services that meet the needs of the communities we serve, including (but not limited to) LEP, low literacy, and individuals with disabilities.</li> <li>• Ensure that minorities and LEP communities see their ethnicity, race, and languages reflected at outreach events and in materials.</li> <li>• Include methods that consider the needs of low-income communities.</li> <li>• Include multiple methods of engagement that recognize and address other barriers to access (e.g., physical, financial, technological, and cultural).</li> </ul>



Theme	Goal & Objectives
 <b>Collaborative</b>	<p><b>Work jointly with the community throughout the planning and project development process.</b></p> <ul style="list-style-type: none"> <li>• Foster sustained and meaningful relationships with community-based organizations, including non-profits, cultural groups, and tenant/neighborhood organizations.</li> <li>• Obtain early input to inform decision-making.</li> <li>• Communicate detailed, easy-to-understand information in a timely manner that allows the public to provide informed input.</li> <li>• Use accessible and diverse strategies that facilitate feedback from all members of the community.</li> <li>• Ensure local jurisdiction partners and WMATA Board members are engaged with, and included in, outreach activities when their communities are affected.</li> </ul>
 <b>Responsive</b>	<p><b>Proactively link public feedback to outcomes in order to build trust.</b></p> <ul style="list-style-type: none"> <li>• Provide updates and results of participation directly to the participants within a reasonable timeframe.</li> <li>• Clearly communicate how public input was used in the development of final recommendations.</li> <li>• Create opportunities for public feedback on general items of interest or concern.</li> </ul>
 <b>Consistent</b>	<p><b>Ensure established guidelines from the Public Participation Plan are followed throughout WMATA.</b></p> <ul style="list-style-type: none"> <li>• Ensure consistency and quality in planning for and conducting public participation activities through WMATA's Department of Customer Service, Communications, and Marketing.</li> <li>• Conduct fiscally responsible and practical public outreach.</li> <li>• Communicate the results of public involvement to all relevant staff and WMATA Board of Directors.</li> <li>• Evaluate the effectiveness of public outreach outcomes with the performance measures established by WMATA; implement corrective measures as appropriate.</li> </ul>

# Chapter 3 – Toward Inclusive, Broad-Based Public Participation

FTA Circular 4702.1B requires transit providers to summarize outreach efforts conducted during the reporting period in their Title VI triennial program update.

Chapter 3 describes the peer agency best practices review and provides a summary of the Washington Metropolitan Area Transit Authority's (WMATA) public outreach activities. This chapter also contains a detailed summary of the public outreach conducted to gather input from the public regarding the Public Participation Plan (PPP) as well as three other outreach initiatives executed during the reporting period. Each summary includes an overview of the outreach process, the results of the outreach, and the lessons learned from each effort.

## Summary of Key Findings

Chapter 3 includes organizational, outreach approach, and outreach execution key findings from the peer review, the PPP specific outreach campaign, *Speak Up! It's Your Ride*, and three recent outreach project examples.

### Organizational Findings:

- Peer agencies have established an institutional framework for public participation that includes a lead department.
- Lessons from recent WMATA outreach efforts suggest that project managers executing outreach would benefit from a clearer outreach process, performance targets, and greater institutional support.

### Outreach Approach Findings:

- Outreach strategies that are tailored to meet the needs of the target population - by meeting people where they are, providing materials in the population's native language, and using outreach staff that can communicate effectively with the population - stand the greatest chance of reaching Title VI populations.
- Community-Based Organizations (CBOs) have the potential to support outreach efforts and make it easier and more efficient to reach Title VI populations. However, WMATA must develop a cooperative and coordinated relationship with CBOs if the Authority hopes to leverage them consistently for outreach support.
- Visual cues, whether outreach campaign banners or eye catching giveaway materials, increase the participation of passersby to public outreach events. Notices about public meetings, particularly among Title VI populations, also serve this function.

### Outreach Execution Findings:

- Event location scouting and coordination is a time-consuming and multi-faceted task, involving demographic analysis, transit access analysis, internal and external coordination, and many variables (ADA access, outlets, tables, chairs, weather, visibility from the street, etc.).



- Event materials management, particularly for multi-event campaigns, influences both the efficiency of the execution and public appearance of outreach initiatives.
- Using public engagement consultants and/or staffing companies that provide additional staffing increases the positive reception of public outreach events.

## Peer Agency Best Practices

As part of the Public Participation Plan (PPP) development process, WMATA conducted a best practices review of peer transit providers. This task was designed to capture insights about public outreach to LEP, minority, and low-income populations and to identify innovative and highly effective public participation practices used with these populations and the public at large. This section provides an overview of the results of the Peer Agency Best Practice Review. Appendix F – Best Practices Review contains detailed findings.

Eight peer transit agencies, one state department of transportation, and one metropolitan planning organization were selected for inclusion in a best practices review. Agencies were selected based on their operating similarity to WMATA and its service area socio-economic and demographic characteristics; their experience preparing a public participation plan under the requirements of FTA Circular 4702.1B; and their experience with the use of inclusive public participation strategies. The agencies that were interviewed for the best practice review were:

- Bay Area Rapid Transit (BART), San Francisco, California (Metropolitan Area)
- Chicago Transit Authority (CTA), Chicago, Illinois (Metropolitan Area)
- Puget Sound Regional Transit Authority (Sound Transit), Seattle, Washington (Metropolitan Area)
- District Department of Transportation (DDOT), Washington, DC
- New York City Transit (NYCT), New York City, New York (Metropolitan Area)
- TriMet, Portland, Oregon (Metropolitan Area)
- Metropolitan Council, Minneapolis-Saint Paul, Minnesota (Metropolitan Area)
- Los Angeles County Metropolitan Transportation Authority (WMATA), Los Angeles, California (Metropolitan Area)
- Southeastern Pennsylvania Transit Authority (SEPTA), Philadelphia, Pennsylvania (Metropolitan Area)
- Miami-Dade Transit (MDT), Miami, Florida (Metropolitan Area)



### *Key Findings*

While each of the peer agencies interviewed operates in its own unique environment, the outreach strategies used to reach constituents are often similar. A number of the peers have incorporated structured ways to involve community organizations and have created an explicit organizational structure to facilitate inter-departmental work on public participation.

The following themes represent the cross-cutting key findings of this peer review.

#### ***Establish an institutional framework for public participation that includes a lead department.***

While names vary by agency, generally there is a department that is specifically tasked with overseeing public participation. In addition, several agencies have developed processes or procedures to facilitate the involvement of several departments (typically civil rights, government and community relations, marketing and communications, and information technology/web) in the public participation process to ensure that public involvement activities are inclusive of minority, limited English proficient, and low-income populations.

BART's Government and Community Relations department is responsible for maintaining relationships with community-based organizations, local elected officials, and other key community stakeholders. BART's Office of Civil Rights assists Government and Community Relations staff with building and maintaining relationships with community-based organizations.

CTA's Government and Community Relations department takes the lead on all project-based and ongoing public participation activities within the agency. Every construction project, planning project, service change, and other major projects are supported by an intra-agency team that includes staff from CTA's Government and Community Relations department, Communications department, and the relevant project lead department (e.g., Service Planning, Capital Projects). This intra-agency team collaborates to develop the project's outreach plan and marketing materials. The Government and Community Relations department is comprised of seven to eight full-time staff members, all of whom have prior experience working in government or non-profit agencies. The department is primarily responsible for maintaining ongoing relationships with local elected officials, community-based organizations, churches, and other key stakeholders.

Sound Transit's internal approach to developing outreach strategies for Title VI populations involves a team approach with staff from a variety of departments, including Planning, Environment and Project Development (PEPD), Community Outreach, Government Relations, and Diversity Programs. Sound Transit's Government Relations Office is the lead office for coordinating community organizations involvement in individual organizations and maintaining these valuable relationships.

New York City Transit's Division of Government and Community Relations consists of 12 managers, a Vice President, and administrative staff. Staff is responsible for liaising with organized constituencies, neighborhood groups, block associations, and community boards when public input is needed.

Los Angeles WMATA's Regional Communications Programs division is the agency's lead division for public participation planning and implementation. Within this division are four units that develop



individual public participation plans for projects, maintain relationships with local elected officials across the service area's 88 local jurisdictions, implement safety education activities, and develop construction mitigations during construction of new transit lines.

Miami-Dade Transit had a dedicated public participation office until three years ago when the office was closed due to budget reductions. MDT put into place an administrative policy and a set of standard operating procedures to provide clear direction on the roles and responsibilities of staff throughout the organization as they relate to Title VI, translation and interpretation, and public participation. An internal committee that has representation from throughout the agency, including service planning, long-range planning, information technology (IT), and marketing and graphics, meets monthly to ensure that MDT is effectively involving and communicating with Title VI populations. This internal committee was established to ensure that someone within every facet of the organization is knowledgeable about Title VI and aware of changes to the Title VI regulatory requirements as they happen.

***Work with community-based organizations to build relationships and trust across diverse populations.***

Trust is essential to building relationships with constituents, especially traditionally underserved populations. Community Based Organizations (CBOs) are nonprofit groups that support local communities through health, educational, and/or social welfare services for disadvantaged residents. CBOs are among the most effective resources available to a transit agency for facilitating the frequent contact needed to build these relationships. Most of the organizations interviewed have staffs that actively work with CBOs on an ongoing basis as a part of their job. Many of the peers interviewed proactively establish and maintain relationships with CBOs on an ongoing basis, prior to requests for involvement or assistance with outreach.

BART's Office of Government and Community Relations maintains a database of CBOs that is regularly updated. Additionally, the office meets with a council of CBOs every three months. BART supports the CBOs they work with by attending their holiday parties and other functions. The goal of these interactions is to show BART's support for the organization's broader missions and to recognize the value of the time and assistance the CBOs provide to support BART.

Los Angeles WMATA works with CBOs at the project-level, identifying key CBOs to involve in the agency's community advisory committee. The community advisory committee works with Los Angeles WMATA staff to develop a set of strategies tailored to the project study area to ensure meaningful, broad-based public participation.

TriMet has a Transit Equity Advisory Committee that includes representatives from local jurisdictions, government agencies, and social service agencies, as well as high school students, public health advocates, and a local transit advocacy group. At monthly committee meetings, TriMet solicits feedback on major agency decisions that have clear equity implications.

Other peer agency approaches include:

- CTA and NYCT assign dedicated outreach staff to a specific neighborhood or community, which allows that staff to truly know that area and build first-hand relationships with local CBOs.



- Sound Transit’s Community Outreach Office maintains a database of CBOs within their service area and actively maintains relationships with these organizations.
- TriMet and the Metropolitan Council maintain active contact with CBOs in their service areas.

***Meet people where they are.***

All interviewees stressed the need to “meet people where they are” rather than expecting riders and other members of the public to come to them. Interviewees also stressed the need to structure participation activities so that they are as inclusive as possible. Each interviewee also noted the importance of holding meetings during weekend and evening hours and to provide translation services to increase meeting accessibility. Workshop-style open houses with interactive activities that are held either in the evening at community centers, or in conjunction with community organizations meetings or events, have been effective methods for many of the interviewees to reach traditionally underserved populations. Most agencies (BART, CTA, Los Angeles WMATA, Sound Transit, and DDOT) also attend local festivals and parades, farmers markets, and regularly planned events to conduct outreach with the general public. Some agencies have a budget to provide child care and food at meetings, which can be a successful strategy for attracting attendees and gaining their full participation.

***Use a variety of tactics to get the word out.***

Agencies use a number of approaches to let the public know about opportunities for engagement. While getting the word out through CBOs was a universally employed method, many agencies used other techniques as well. For example, in partnership with Chicago Public Schools, CTA included a flyer about the Redline South Closure with student report cards. Staff also distributed project materials at festivals and other special events that attract immigrant and minority audiences (e.g., Polish Constitution Day).

Sound Transit utilizes bilingual outreach staff to conduct door-to-door outreach in high LEP communities. Several agencies (Sound Transit, DDOT, and Miami-Dade) also use newspaper advertisements, particularly placing them in newspapers that target LEP populations.

***Use technology appropriately.***

Several of the agencies interviewed noted that while technology has its place in public participation, it should only be used where appropriate. TriMet has found technology is useful in reaching young professionals but always supplements technology-based outreach with traditional, face-to-face outreach. DDOT has also garnered considerable success by conducting online surveys and by making surveys available on iPads at outreach events.

At their LEP advisory committee’s suggestion, BART uses social media tools that are accessible via smartphone to reach Title VI populations. Los Angeles WMATA feels strongly that all young people (approximately under the age of 30), regardless of socio-economic status, utilize social media, and the agency seeks to actively engage with them online. Metropolitan Council and Sound Transit both encourage the use of social media where it is appropriate. However, Miami-Dade Transit does not believe that social media is effective in reaching minority and low-income riders, and SEPTA only uses social media in certain contexts, preferring face-to-face meetings for some hard-to-reach populations.



***The use of performance measurement data to guide inclusive public participation remains limited.***

Only four agencies actively collect performance measurement data. Two of the four pointed out that monitoring the success of outreach is difficult because it is not simply an issue of how many people show up at events; it is about an agency's ability to implement public engagement in a meaningful way.

***Tailor strategies and staff to meet the needs of the affected population.***

A number of interviewees, including BART, CTA, and Los Angeles WMATA, mentioned the need to address individual communities with specific strategies. For example, LA WMATA conducts outreach through local churches to reach the African-American community but has found the best way to reach the Hispanic community is by attending farmers markets and festivals.

Several agencies make an active effort to staff their public outreach office with bilingual and bicultural staff that can help bridge cultural barriers. Staff is assigned to specific projects as needed.

***Unique and Innovative Strategies***

Several strategies stood out as successful practices even though they were employed by a small number of interviewees:

- Three agencies found success in bringing a high-level agency official to outreach events. CTA's President and the Chairman of the Chicago Transit Board regularly attend public meetings and general community outreach events. CTA's President, Chairman, and other board members attended their CTA Red Line Extension project open house, and they participate in parades and community festival events throughout the year. At CTA, involvement of high-level officials in community outreach events has remained consistent across changes in leadership. This brings legitimacy to the outreach and makes people feel that their feedback is going straight to the highest level of agency management.
- BART recorded a presentation on disparate impact and disproportionate burden that was delivered to its council of community-based organizations and placed it on YouTube for the general public to view.
- CTA uses City Year Volunteers (young adults participating in national volunteer program that provides recent high school graduates with public service opportunities) to assist with public outreach.
- In addition to language translation, CTA uses universal visuals in its public outreach materials and wayfinding infrastructure to accommodate low-literacy populations in the service area.
- DDOT found that branding a project and creating a unique logo makes a campaign more recognizable.
- NYCT rents a storefront near large construction projects to provide information and be accessible to local residents and businesses.
- The Metropolitan Council runs a Trusted Advocate Program that employs members of minority and immigrant communities in Minneapolis-St Paul to learn about transit projects and take information back to their respective communities. Instead of relying on translators, the



Metropolitan Council also employs outreach staff members who are fluent in the major languages spoken in the service area.

### *Best Practice Review Recommendations*

The presence of a lead department for public involvement within WMATA would ensure that there are both procedures and staff dedicated to designing and implementing high-quality public outreach programs. As evidenced by peer agency practices, most agencies have a department tasked specifically with overseeing public participation. Furthermore, building and maintaining relationships with CBOs, meeting customers “where they are”, tailoring strategies towards specific populations, and collecting performance data to track outreach all will require additional resources. In addition, this office would prevent overlapping public participation activities among various departments and allow other staff to focus on the technical aspects of their projects, saving resources for the Agency as a whole while still ensuring that public participation activities are adequately and appropriately staffed.

Building and maintaining relationships with CBOs and other key community stakeholders requires ongoing relationships with organizations and communities. Dedicated staff within the Authority would develop deeper relationships with each CBO, learning about their operations, constituents, and interests. Piecemeal CBO outreach is unlikely to provide the same level of relationship, information, or insight.

In the near-term, WMATA should focus on addressing the structural and staffing components of public participation at the Authority. WMATA also should focus on building relationships with CBOs to develop a deeper understanding of the transit needs and interests of the diverse communities that comprise the WMATA service area. To do this well, there must first be a structure for maintaining these relationships over the long-term.

## Lessons from Recent WMATA Outreach Efforts

FTA Circular 4702.1B requires that public participation plans include a summary of outreach efforts made since the agency’s last Title VI Program submission. Appendix A – Public Participation Summary, 2011-2013 contains both the list of these activities and three examples of recent efforts - *Love Your Bus Stop*; Silver Line Phase 1; FY15 Budget - that started to use some of the techniques and strategies identified in this plan. While the three examples are not representative of every public participation activity at WMATA, they provide insight into how WMATA can successfully implement inclusive public participation activities. The purpose, scope, and topic of project examples vary, but similar techniques were used to ensure the inclusive involvement across all three. A summary of the lessons learned from the three examples follows.

**Table 4 Outreach Strategies Utilized by Project Example**

	<i>Love Your Bus Stop</i>	Silver Line Phase 1	FY2015 Budget and Fare Proposal
Metrorail / Bus Transfer Center Pop-Ups	Yes	Yes	Yes
Open House, Meetings or Hearings	No	Yes	Yes



	<i>Love Your Bus Stop</i>	Silver Line Phase 1	FY2015 Budget and Fare Proposal
Community Festival or Event Participation	Yes	Yes	No
Outreach Surveys	Yes	Yes	Yes
Walkabouts <sup>14</sup>	No	Yes	No
CBOs	Yes	Yes	Yes
Translation and Interpretation Provided	Yes (Six Languages)	Yes (Three Languages)	Yes (Six Languages)

Short public input surveys were available in four to seven languages and administered on tablets at pop-up events at Metrorail stations, bus transfer centers, community festivals, and other community events and were key tools used for these projects. This strategy appears to be successful in soliciting quick input (surveys should take no longer than five minutes to complete) for proposed changes or topics that require no background knowledge. Incentives, such as a giveaway or a chance to win a \$50 SmarTrip® card, increased survey participation. Pop-up events resulted in the greatest number of participants.

However, among the project examples presented, only the *Love Your Bus Stop* survey succeeded in reaching a greater proportion of minority respondents (60 percent) than WMATA's systemwide minority ridership (56 percent), as shown in Table 11. None of the surveys succeeded in reaching a proportion of respondents equal to the proportion of Metrobus riders who are minority (76 percent). The ability of the surveys to garner robust participation by low-income individuals also varied widely. The *Love Your Bus Stop* event survey yielded a low-income response of 63 percent – far exceeding the proportion of WMATA low-income ridership systemwide (24 percent), on Metrobus (43 percent), and on MetroAccess (51 percent). The *Love Your Bus Stop* survey and the Silver Line “Comment Card” online survey both resulted in lower proportions of minority and low-income respondents than the surveys conducted at pop-ups and events.

**Table 5 WMATA Ridership Demographic Profile - 2013<sup>15</sup> and Project Survey Respondent Demographics**

	Percent Minority	Percent Low-income Respondents
<b>WMATA Riders Systemwide</b>	<b>56%</b>	<b>24%</b>
Metrorail	43%	11%
Metrobus	76%	43%
MetroAccess	69%	51%
<b>Outreach Survey</b>	<b>Percent Minority</b>	<b>Percent Low-income Respondents</b>

<sup>14</sup> Walkabouts involve WMATA staff walking around a neighborhood, community center, or shopping center to distribute information.

<sup>15</sup> Source: Title VI Equity Evaluation of Final FY2015 Budget Proposal



	Percent Minority	Percent Low-income Respondents
<b>Love Your Bus Stop</b> – Events	60%	63%
<b>Love Your Bus Stop</b> - Online	41%	29%
Silver Line “Comment Card” Survey – Online	40%	7%
Silver Line “In-Person Comment Card” Survey – Paper	43%	14%
FY2015 Budget and Fare Survey	40%	17%

In addition to pop-up events, the Silver Line Phase 1 Public Involvement project and the FY2015 Budget and Fare Proposal project also held public meetings or hearings. The Silver Line Phase 1 public outreach effort also used open-house style public meetings, which were successful in attracting more than 500 individuals. The extensive outreach promoting these meetings was effective in attracting participation by community members, and the open-house style was an effective means for staff to engage in conversations with individuals. The Silver Line Phase I project made a proactive effort to involve specific LEP populations (Vietnamese, Spanish, and African language speakers) by working with local CBOs to distribute information through presentations and translated printed materials. Silver Line Phase 1’s multi-faceted approach met people where they were through pop-ups, provided information through well promoted open-house style meetings, and targeted outreach to LEP communities. By using these approaches, WMATA succeeded in reaching a wide diversity of residents in the WMATA service area.

All three project examples demonstrated the need for involving staff that culturally and linguistically reflects the demographic profile of both the local areas where outreach is occurring and the ridership of the system by station or line. The use of culturally appropriate staff was a key factor in attracting the participation of individuals that reflect the diversity of WMATA’s ridership and the communities it serves. Providing staff that can communicate with LEP persons is critically important to ensuring that all members of the public feel comfortable engaging in public participation opportunities. Also critically important to this task, and to the task of translating surveys and written material, is providing staff with whom the public can personally identify (“someone who looks like me”).

## Speak Up! It’s Your Ride Outreach Overview

WMATA conducted a public outreach campaign, *Speak Up! It’s Your Ride*, to aid in the development of its Public Participation Plan (PPP). *Speak Up! It’s Your Ride* was designed to gather information and obtain guidance from the community (through focus groups and a survey) about their preferences for receiving information and providing feedback. The information collected from the public was used to inform the outreach strategies in the PPP to ensure that WMATA’s public outreach efforts are inclusive and accessible for Title VI populations. Appendix G – *Speak Up! It’s Your Ride* contains the detailed background and results obtained from the campaign.

The *Speak Up! It’s Your Ride (Speak Up!)* campaign used a multifaceted approach to obtain public input. It encompassed 38 outreach events and activities that took place over three months from February 2014



through April 2014. *Speak Up!* events included 15 focus groups with community-based organizations (CBOs) and 23 public outreach events held at 20 unique locations. These events yielded 1,726 completed surveys; an additional 1,787 surveys were taken online. The results of the *Speak Up!* campaign provided insights about:

- Strategies CBOs use to reach out to their clients and constituents and their perspectives about collaborating with WMATA;
- Communication and feedback preferences from 3,513 survey respondents, of which 69% were minorities, 28% were low-income, and 10% were LEP; and
- Lessons learned for each outreach event.

A brief synopsis of the campaign strategies and results follows.

### *The Process*

#### *Community-Based Organizations Outreach*

CBO outreach was part of the pre-launch of the *Speak Up!* campaign. This first initiative involved combining several internal WMATA CBO contact lists into a single CBO database. The project team then used the database to email 200 CBOs requesting that they participate in an on-line or phone survey regarding the communication preferences of their clients and constituents and to gauge their interest in working with WMATA on an ongoing basis. More than 80 CBOs responded to the survey, yielding information the team could use in the design of the next phase of outreach.

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*More than 40 CBOs expressed an interest in meeting with WMATA separately to provide more detailed information about the cultural communication preferences of their clients/constituents in order to inform the design and delivery of public outreach events.*

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Following the CBO survey, WMATA held 15 CBO focus groups with representatives from a total of forty-one community-based organizations. Of the 15 CBO focus groups, six involved CBOs that work exclusively in the District of Columbia, two included organizations that work exclusively in Maryland, four included organizations that work exclusively in Virginia, and three included organizations that work with clients and constituents throughout the greater Washington, D.C. metropolitan area.

#### *Speak Up! It's Your Ride Public Outreach*

As part of the *Speak Up!* campaign, twenty-three events were held throughout the WMATA service area; these public events were designed to meet the needs of traditionally hard-to-reach populations, including minority, low-income, and LEP individuals. Campaign events and materials were structured to increase accessibility and ease of participation by these groups. Ultimately, five different methods were available for stakeholders to provide input: the survey, electronic voting, small group discussions, large group open discussions, and individual conversations.



At the 17 pop-up events, project staff used hand-held tablets to administer the online survey. At these events, project staff and a “street team” of survey administrators set up a WMATA table and project-branded banner. Customers passing by were asked to take the survey on a tablet.

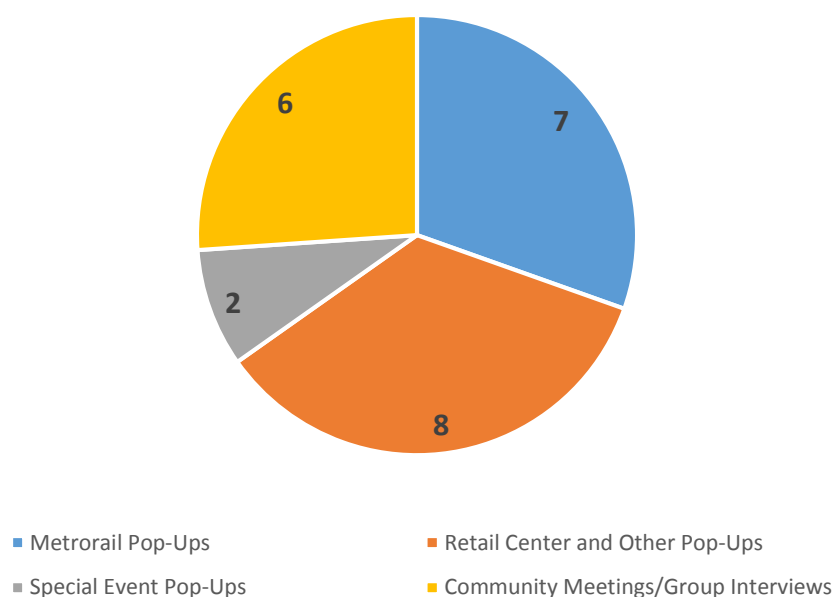
At the six community meeting events, the *Speak Up!* team used context-specific approaches that were tailored to the demographic of the audiences. Two of the community meetings took place in classroom settings: the first at CASA de Maryland English as a Second Language (ESOL) classes, and the second at a meeting with students at Montgomery College in Takoma Park. Each began with brief presentation on *Speak Up! It's Your Ride*. The ESOL class presentation was conducted in both English and Spanish, and a WMATA staff member in attendance also answered student questions in French. After the presentation, the ESOL students participated in a mini-survey using electronic keypad voting.

The *Speak Up!* team also met with more than 200 low-income, Chinese-immigrant, senior citizens at a large group community meeting at the Chinese Culture and Community Service Center in Gaithersburg, MD. WMATA staff gave a modified version of the *Speak Up! It's Your Ride* presentation, held a question and answer session using simultaneous Chinese/English translators, and administered printed versions of the survey in Chinese to all the participants.

Two of the community meetings featured a slightly more informal “drop-in” format. WMATA collaborated with both the South County Government Center service center in Fairfax County and the leadership of the Dar Al-Hijrah Islamic Center to promote small group meetings at the respective sites. Two group interviews were also held; one interview was held with student leaders at Montgomery College’s Takoma Park Campus, and a second employee interview was held at the DC USA Shopping Center. Informal “drop-in” format events required WMATA staff to recruit attendees on site the day of the meeting, which differs from formal meetings where a specific list of people is invited to attend in advance.

*Speak Up!* events were held across the WMATA service area, with six events held in the District of Columbia, four in Prince George’s County, four in Montgomery County, two in Arlington County, one in the City of Alexandria, and one in the City of Falls Church.



Figure 6 *Speak Up! It's Your Ride* Event Types Held

The public events that were held as part of the *Speak Up!* campaign were heavily promoted and marketed throughout the outreach period, as was the online survey associated with the campaign.

The *Speak Up!* campaign marketing and communications strategy included a distinct project brand and logo, online media, a campaign website with a link to the survey, print media, and radio promotion. The logo was used on all marketing materials, including project giveaways, printed, and online media. All printed and promotional materials for the project were translated into the seven most frequently spoken languages<sup>16</sup> other than English in the WMATA service area. Event-specific materials were tailored by language need and cultural communication preferences, and appropriate interpretation services were provided at each event.

Speak Up! It's Your Ride  
Logo



Lastly, the campaign outreach team closely tracked the performance of each outreach event in order to build upon data collected through the survey and to identify logistics and planning challenges that would inform future events and campaigns. This feedback was collected after each event in an Event

<sup>16</sup> These languages are Spanish, Mandarin Chinese, Korean, Vietnamese, African Languages (Amharic), French, and Arabic.



Summary<sup>17</sup> that included key performance indicators, general observations, recommendations, and pictures from the event.

### *The Results*

#### *CBO Focus Groups*

The focus groups were extremely informative and provided an opportunity for WMATA to begin to develop relationships directly with organizations that serve Title VI protected and other traditionally underserved communities. The insights shared by CBOs as they relate to public participation strategies that work for their clients/constituents are as follows:

- Buses and bus stops are the best locations for distributing information.
- Use media outlets that are specific to each cultural group or community.
- Informational materials should be available in the target population's native language.
- Informational materials should be designed to have graphics and minimal text.
- Informational materials should be distributed to locations that many riders frequent but are not necessarily transit related, such as CBOs, libraries, grocery stores, and residences.
- To engage Title VI populations, go where they are.
- Meeting formats should be tailored to the preferences of individual groups or communities; they should demonstrate that the public's input will be addressed.
- Ask for time at a recurring CBO meeting, such as a staff meeting or a recurring meeting with clients, rather than asking for an additional meeting.
- Know your audience so that you can bring the appropriate WMATA staff to events.
- Provide activities to keep children busy and allow parents to engage.
- A goal of any informational campaign should be to get people talking to each other about the topic at hand.

#### *Speak Up! Survey*

The key findings from the *Speak Up!* survey are as follows:

##### Public Hearings and Meetings

- Just under 10 percent of survey respondents had ever attended a WMATA meeting. This number varied only slightly among demographic groups: 12 percent of minorities, 14 percent of



LEP respondents, and 8 percent of white respondents said they had attended a WMATA meeting.

#### Receiving Information

- When asked how they heard about community events and services, 66 percent of respondents chose the internet, while 52 percent chose newspaper. Black/African American and Asian/Pacific Islanders respondents chose newspaper more often than other options, while Hispanic respondents chose online slightly more than other options. Low-income and LEP respondents chose newspaper most often and were also far less likely to hear about events in the community via internet.
- Survey respondents were asked to name the top three ways they would like to receive information from WMATA. All races, in addition to LEP and low-income populations, included “Flyers at Metrorail Stations” and “Ad in newspaper” among their top three. White/Caucasian and Asian/Pacific Islander populations included “WMATA website” in their top three, while Black/African American, Hispanic, low-income and LEP populations included “Flyers on Metrobus” among their top three.

#### Providing Feedback

- All groups ranked surveys, open discussions, and question and answer sessions highly as preferred meeting formats. White/Caucasian, Hispanic, and Asian/Pacific Islander all chose “Question and Answer Session” as the most preferred meeting format. Black/African American survey respondents chose “Show of Hands Voting” as the most preferred format. There was a significant drop off in the acceptance of electronic voting for senior citizens, from 15 percent for the 18-34 year olds to 4 percent for those 65+.
- When asked what would make it easier to attend a meeting, all groups except LEP populations chose the same top three options: location near work or home, convenient time of day, and near public transportation. LEP groups were more likely to choose “Interpreter Available in Native Language” instead of convenient time of day.
- When asked what time of day would be best to attend a WMATA meeting, 46 percent of respondents chose weekday events, and 35 percent chose weekends. Asian/Pacific Islanders, low-income, and LEP populations differed from all other respondents by having a stronger preference for meeting on weekends.

#### *Event Review*

Through executing the outreach campaign and tracking the results and challenges at each event, staff learned the following:

- Smart supply management leads to organized outreach.
- All local support staff at the event location should be informed about the details of the event and trained in advance as to the purpose and format of the event.



- Good visibility is worth the effort.
- Outreach campaigns are staff-intensive and require strategic staffing plans.
- A WMATA staff person should be present at every outreach event. Events that use contract staff should be managed onsite by WMATA staff.
- The use of street teams is an effective way to provide additional staff for pop-up type outreach, especially to provide bilingual and culturally appropriate staff.
- Shorter surveys engender greater participation.
- Giveaways that are tied to survey completion draw people to the event and make them feel good about their participation.
- There must be a thoughtful way for event participants to provide comments that address topics unrelated to the survey or outreach activity.
- Survey questions should be easy for people to understand, with particular attention given to what might be lost in translation to another language. When appropriate, the use of graphics and illustrations are also encouraged.
- Bilingual staff members provide both linguistic and cultural translation.

### *Speak Up! Overall Findings*

The results from the *Speak Up!* outreach provided critical information for the development of the strategy recommendations within the Public Outreach Project Toolkit. Using the quantitative and qualitative data gathered through the *Speak Up!* campaign, self-reported feedback preferences were identified for many Title VI population groups.

The *Speak Up!* campaign results effectively captured information from a representative proportion of WMATA's minority, low-income, and LEP riders. However, certain groups were better represented across the three information collection strategies (CBO focus groups, survey, event summaries), and others were not properly represented in any of the three strategies. When specific demographic group findings directly supported each other, WMATA found strong evidence to suggest particular strategies. The following demographic groups had limited representation, and thus no specific conclusions on feedback preferences were identified: American Indian or Native Alaskan and the following language groups: Korean, Amharic, French, Farsi, Arabic, Tagalog, and African languages. Ongoing data collection, performance monitoring of outreach events, and improved collaboration with area CBOs will likely help fill in the gaps over time.



## Chapter 4 – Managing Public Participation

Chapter 4 addresses FTA Circular 4702.B's requirement that the Public Participation Plan explicitly describe the proactive strategies *and* procedures that underpin public participation activities.

The Washington Metropolitan Area Transit Authority (WMATA) committed to implementing the strategies and processes that will result in high-quality, inclusive public participation across the organization, as required by FTA C 4702.1B. Per the Circular's requirements, the Public Participation Plan must address the proactive strategies, procedures, and desired outcomes that will result in the meaningful participation of Title VI populations in agency planning and programming. The Circular (Chap. III-5) states:

The content and considerations of Title VI, the Executive Order on LEP, and the DOT LEP Guidance shall be integrated into each recipient's established public participation plan or process (i.e., the document that *explicitly describes the proactive strategies, procedures, and desired outcomes that underpin the recipient's public participation activities*).

While WMATA already is using some of the strategies recommended in this plan, the PPP development process identified gaps in WMATA's current public participation procedures that, if modified, would improve the Authority's ability to involve traditionally underserved groups. This chapter details current public participation practices at WMATA and provides a set of organizational and procedural strategies that WMATA will implement over the next three years to ensure Title VI compliance. The procedural strategies described are based on input received from WMATA staff and several WMATA Board members during interviews for this plan, best practices identified in the Best Practice Review, and feedback from CBOs and the public.

### Summary of Key Findings and Recommendations

In 2013 and 2014, WMATA experienced a rapid increase in the number and scope of public participation activities due to both the number and scale of projects requiring public participation at WMATA and new Title VI requirements to ensure inclusive participation and a refreshed commitment to engaging public outreach. **In 2013, the first full year following the release of FTA C 4702.1B in October 2012, there were 94 unique public participation events – more than triple the number of events in the previous year.**

At WMATA today, the process for planning, implementing, and evaluating outcomes (e.g., public satisfaction, use of public input) from public participation occurs on a project-by-project basis. With public participation responsibilities growing, this disaggregated method of incorporating public participation is becoming more difficult for the Authority to sustain. An over-reliance on contractors to implement major public participation projects is resulting in duplicating costs for similar resources needed for public outreach. The use of contractors does not build internal public participation expertise in-house. WMATA staff have had limited ways to coordinate public participation efforts or share lessons learned. Staff whose primary skill sets and responsibilities are not related to public participation are



spending a significant amount of time planning for public participation, taking time away from their core position responsibilities.

Interviews with 18 groups of WMATA staff (57 individuals) four WMATA Board members, coupled with a review of public participation practices at ten peer transportation agencies across the country, led to the identification of five key procedural and organizational gaps that should be improved to enhance the Authority's ability to implement inclusive, high-quality public participation that is compliant with FTA C 4702.1B:

1. **Inconsistent use of public participation strategies and implementation.** *Currently individual departments coordinate and implement their own project-based outreach at WMATA. As a result, individual projects must “reinvent the wheel” every time a new public participation effort begins, designing outreach strategies, developing and purchasing marketing materials, researching potential media buys, and creating entire outreach plans from scratch.*
2. **Lack of coordinated oversight and internal public participation expertise.** *Today, there is no central resource for the oversight of public participation activities or public participation planning, assistance, and expertise at WMATA. The lack of oversight and coordination has resulted in inconsistent public participation outcomes, with no established review process for public participation materials or planning documents, no sharing of relationships built with community services or knowledge gained between public participation projects, overlapping outreach projects, and little coordination in the timing, location, or extent of public participation activities.*
3. **Limited, ad-hoc relationships with community-based organizations (CBOs).** *CBOs are engaged by various offices on an as-needed basis, and WMATA has been unable to coordinate requests or provide a single point of contact at the Authority for these important community partners.*
4. **Absence of performance measurement and accountability for public participation outcomes.** *Although each project team and department has their own internal assessment (either formal or informal) of the results of their public participation activities, WMATA currently lacks performance measures to determine what constitutes successful outreach on a project-basis or for the Authority as an organization. No office has accountability for public participation outcomes today.*
5. **Absence of an in-person forum for soliciting general public feedback.** *WMATA currently does not provide regularly occurring in-person opportunities for the public to provide general comments on the transit issues, concerns, and suggestions that matter to them. Additionally, there is no consistent method for letting the public know how their feedback influenced transit outcomes.*

To address these gaps, the Public Participation Plan has established a set of sixteen strategies, including the development and implementation of the Public Participation Toolkit and Public Communications and



Outreach Plan template (a standardized process for planning public participation at WMATA) and the identification of a new set of staff resources and skill sets needed to adequately provide the internal resources for public participation at WMATA:

- In FY2015, the Office of External Relations (EREL) will take the lead in implementing the Public Participation Toolkit and Public Communications and Outreach Plan template, which will remove the responsibility for planning and implementing public participation from individual departments. EREL will expand to include a Public Participation branch, which will include three new staff positions: a Public Participation Manager and two Outreach Specialists. A staff position already has been added to the Office of Equal Employment Opportunity (OEEO) to manage relationships with community based organizations.
- In FY2015, contractor assistance for public participation will be made available through a single, on-call contract that will provide WMATA with cost-effective, timely access to vendors that can provide staffing solutions, graphics, translation, interpretation, and assistance with planning and implementation, as needed.
- In FY2016, the new Public Outreach branch will further expand to an additional 4-6 staff to partner with individual WMATA departments to plan, implement, and evaluate their public participations activities. The Office of Equal Employment Opportunity will add a staff position to assist with managing relationships with community based organizations. A Community-Based Organizations Outreach Committee will be created to provide these organizations with an opportunity to provide input to WMATA on a formal and continual basis. “No Agenda” community outreach, which allows the public to identify issues that they wish WMATA to address, will be implemented.

The strategies identified in this chapter are tailored to the specific challenges faced by WMATA in implementing high-quality public outreach. They were developed with the input of WMATA staff from across the organization and will provide a cost-effective way to meet the organization’s public participation needs.

## Public Participation at WMATA Today

Today, WMATA develops public participation plans, funds the development of materials for public participation, and implements public participation activities on a project-by-project basis. WMATA staff across the organization plans, implements, and participates in public participation activities. Public participation activities are conducted for environmental projects, bus and rail studies, long-range planning studies, fare and service changes, and to solicit rider input on a wide range of issues. WMATA’s customer research department also conducts a number of rider surveys each year. Some of these surveys are part of the overall public participation plan for individual projects; others gauge rider perceptions of WMATA’s performance following service disruptions, other events, or rider satisfaction with services.

All WMATA employees involved with public participation are responsible for implementing activities that include traditionally underserved populations and that comply with Title VI requirements. WMATA’s successes in facilitating the involvement of Title VI protected populations in recent years



include outreach for the Silver Line Phase 1 and the Bus Livability Outreach, or *Love Your Bus Stop*, projects, which are profiled in the Project Examples in Appendix A. Each of these standalone projects identified strategies to reach Title VI protected populations, without detailed, overarching guidance on the strategies, venues, and formats that have been successful in past projects. Until this PPP, there were no mechanisms in place to share the successes and lessons learned with others in the Authority.

In addition to their primary workloads, staff across many WMATA departments attend and oversee a large number of public participation meetings and activities. The staff currently executing public participation activities typically has little to no subject matter expertise related to public involvement. Staff interviews conducted for the PPP revealed that public participation is an activity that many staff members view as a part of their job, but it is often not their primary job responsibility. Furthermore, the majority of staff does not have a significant level of expertise with reaching out to and engaging with the public at large, let alone traditionally underserved or hard-to-reach communities.

While the project-based public participation model assigns the primary responsibility for public participation to the project manager, a number of other WMATA departments are involved in the development of public participation materials and staffing. For example, for WMATA's FY15 Budget outreach efforts, employees from at least five WMATA departments and two contractors were involved in public outreach:

- WMATA departments worked with two contractors to staff events and administer surveys at pop-up events at Metrorail stations and bus transfer centers.<sup>18</sup> WMATA departments involved in staffing these events were the Customer Service Center, Management and Budget Services, Planning, and Office of Equal Employment Opportunity.
- In addition to helping at pop-up events, WMATA's Office of Equal Employment Opportunity also participated with budget and planning staff in separate outreach to community based organizations.
- WMATA's Board Secretary's Office planned the public hearings on the budget, which included a fare increase, and hosted information sessions before the hearings for the public to learn about the proposals and provide comments.

Today, it is incumbent upon the individual project manager to arrange for the participation of all relevant departments as needed. Since a central resource for public participation does not currently exist, each individual project manager must seek to identify the necessary input from other departments, develop their own methodology for planning and staffing outreach activities, order or borrow basic materials (e.g., tents, tables, giveaways), and develop individual project brands, materials, and campaign slogans. This has resulted in an inconsistent process for the planning and development of public participation activities. For example, some WMATA departments develop their own marketing materials, while others go through the WMATA marketing department. This process has also led to multiple, overlapping public participation campaigns and brands, the repeated purchase of basic materials, increased costs, and decreased efficacy of public participation.

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<sup>18</sup> WMATA Public Outreach Summary Fiscal Year 2015 Fare Proposal/Public Hearings. January 2014.



Project managers do not have access to information about the successes and challenges of past outreach activities or about how to work with community-based organizations (including information about which organizations have worked with individual departments at WMATA in the past). Since public participation is everyone's responsibility, there is no single person or department at WMATA whose primary expertise and responsibility it is to ensure high-quality, inclusive public participation.

## Department-Level Public Participation Activities

Figure 7 displays a chart with each office or department that participates in or conducts public outreach activities. A brief explanation of each office/department's role in public participation is below.

**Board Secretary:** Responsible for planning public hearings, including booking venues, coordinating all communications pieces and printed materials. Staff liaison to Rider's Advisory Council (RAC).

**Safety:** Various outreach to the public on safety issues, like escalator safety and slip, trip, and fall awareness.

**Dulles Metrorail Extension:** Stakeholder outreach/presentations for high-level Silver Line related projects.

**WMATA Transit Police:** Coordinated outreach activities that include the Respect Your Ride student campaign and safety tips to the public.

**Office of Equal Employment Opportunity:** Serves as the point of contact for translations and quality checks, provides bilingual staff to outreach events, identifies if Title VI is triggered. Organizes and administers outreach to community-based organizations.

### Bus Services

- **Bus Planning & Scheduling:** Responsible for planning all public outreach for each bus study as well as the implementation outreach for service changes. Also responsible for posting notices for detours/changes at bus stops and shutdown signage for shutdowns.
- **Bus Maintenance:** Responsible for posting official notices on bus fleet.

### Customer Service, Communications & Marketing

- **Customer Research:** Responsible for coordination and review of WMATA surveys to the public.
- **External Relations:** Responsible for the overall coordination of the PPP and for guiding outreach for special initiatives and communication to non-elected stakeholders, businesses, and organizations.
- **Customer Service:** Serves as main funnel for collecting feedback from the public, both online and on the phone.
- **Media Relations:** Releases information to the public about upcoming outreach initiatives, as well as updates information on the website.
- **Marketing:** Creates and produces many materials and giveaways for various outreach initiatives throughout the agency, as well as staffs festivals and events around the region.



**Transit Infrastructure and Engineering Services**

- **Track, Structures and Facilities:** Responsible for coordinating shutdowns and track work.
- **Office of Elevators and Escalators:** Involved in public outreach and communication strategies in regards to elevator and escalator projects.
- **Plant Maintenance:** Responsible for installation of permanent signage and WMATA banners.
- **Car Maintenance:** Responsible for posting official notices on rail cars.
- **Rail Transportation:** Responsible for communications to station managers, in-station temporary signage, PID, system announcements, and MetroAlert messages.

**Intermodal Strategic Planning:** Stakeholder outreach/presentations for high-level projects.

**Human Resources Talent Acquisition:** Outreach to various communities for recruitment purposes; attends fairs and other events.

**Chief of Staff**

- **Government Relations:** Stakeholder outreach to elected officials, as well as representative at ANCs and other neighborhood outreach events.
- **Planning:** Stakeholder and public outreach on transportation planning projects. Manages MindMixer and PlanItMetro blog. Liaisons to Transportation Planning Board and jurisdictions via Jurisdictional Coordinating Committee (JCC).
- **Strategic Communications & Marketing Planning:** Stakeholder outreach/presentations for high-level projects, like Momentum.

**Deputy General Manager Administration**

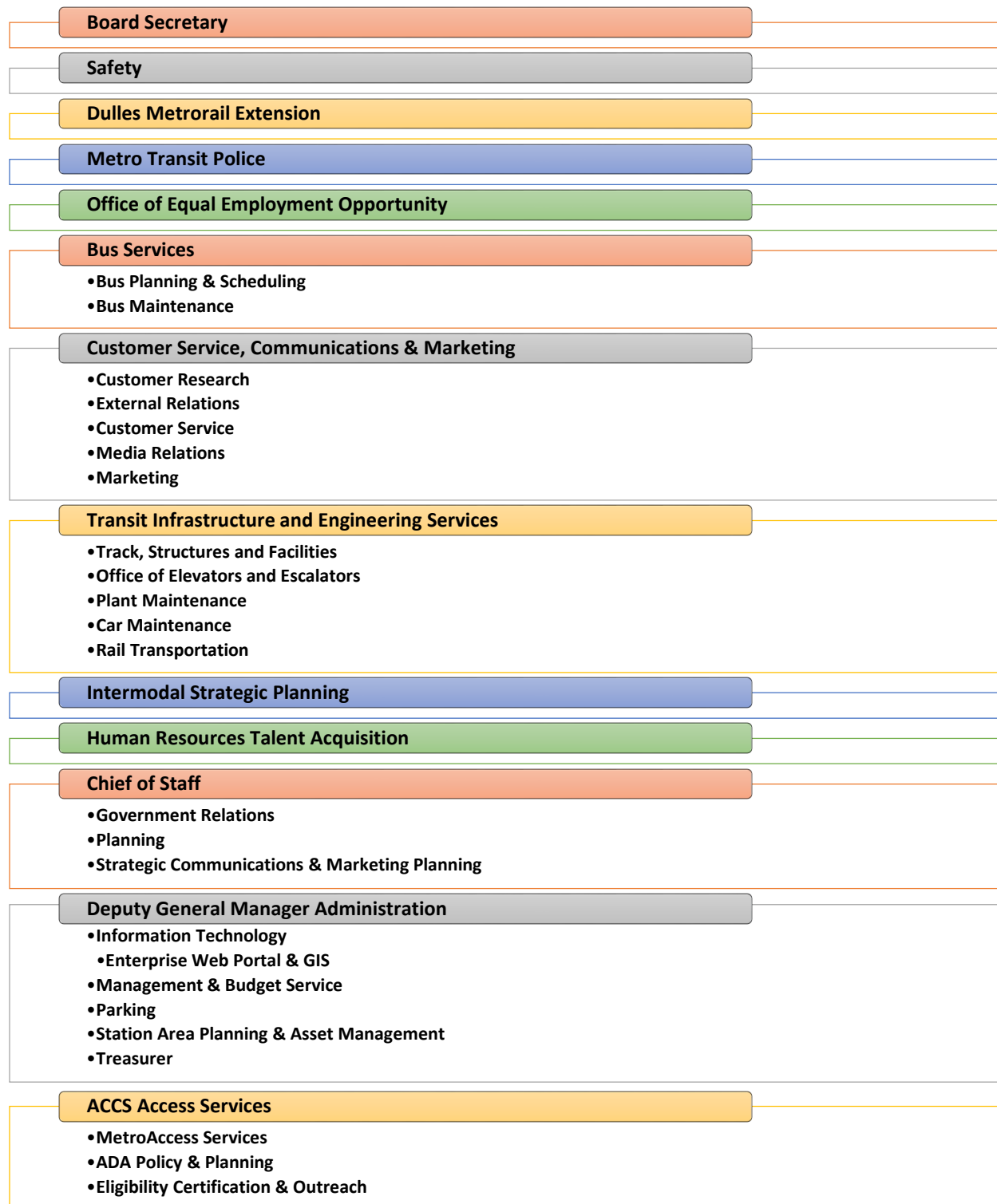
- **Information Technology**
  - **EWPG Enterprise Web Portal & GIS:** Responsible for designing, building, and maintaining the Internet and Intranet. This includes the Public Events Calendar, outreach initiatives, and Google translate.
- **Management & Budget Services:** Involved in public outreach and communication strategies in regards to budget/fare changes and new payment systems.
- **Parking:** Involved in public outreach and communication strategies in regards to parking facility projects and changes.
- **Station Area Planning & Asset Management:** Involved in public outreach and communications strategies in regards to joint development projects.
- **Treasurer:** Involved in public outreach and communication strategies in regards to fare media.

**Access Services**

- **MetroAccess Services:** Communication to MetroAccess operators.
- **ADA Policy & Planning:** Communicates and coordinates outreach to ADA community, as well as quality assurance program to make sure WMATA services, facilities, and events are always in compliance with the Americans with Disabilities Act.
- **Eligibility Certification & Outreach:** Provides travel training and outreach services to the community.



Figure 7 WMATA Departments and Offices that undertake in Public Participation Activities



## Staff and Board Member Interviews

As part of the PPP development process, 18 groups of WMATA staff from 16 departments throughout the authority and four Board members were interviewed to document current public participation practices, successes, challenges and constraints, resources and resource needs, and ideas for enhancements. Each group was asked about its role in public participation at the agency today, how the group undertakes public participation, and the group's ideas for improving public participation at WMATA. The offices and departments that participated in the staff interview process included:

1. **Deputy General Manager Administration**
2. **Board Secretary**
3. **Bus Planning & Scheduling**
4. **Customer Service, Communications & Marketing**
5. **Customer Service**
6. **External Relations**
7. **Government Relations**
8. **Marketing**
9. **Media Relations**
10. **WMATA Transit Police Department**
11. **MetroAccess Services**
12. **OEEO Office of Equal Employment Opportunity**
13. **Planning**
14. **Transit Infrastructure and Engineering Services**
15. **Rail Transportation**
16. **Station Area Planning & Asset Management**

A total of fifty-seven individual WMATA staff members and four WMATA Board members participated in these 18 group interviews. The large number of individual staff, as well as the cross-section of interviewed departments, provided substantial background regarding WMATA's current public participation process and specific staff recommendations for improving the oversight, management, and quality of public participation.

### *Interview Key Themes*

The table below summarizes common themes heard during the interviews. The most common sources of concerns were organizational (e.g., lack of central outreach office, confusion about staff roles). Many interviewees also felt that WMATA could be more proactive about promoting positive outcomes and opportunities for participation and in getting more information out to the public. The interviewees also noted strengths in WMATA's current public participation process, identifying individual campaigns and department-specific efforts that effectively reached target populations.



Table 6 Current Public Outreach Practices – Strengths

Current Practices	Strengths
<b>General Strategies</b>	<ul style="list-style-type: none"> <li>Using SmarTrip® database to target customers on specific routes for surveys.</li> <li>Administering intercept surveys on the bus and holding informal discussions on the bus to understand local issues.</li> <li>Holding “agenda-less” open houses.</li> <li>Communicating with drivers and operators via signs in bus garages or locker areas.</li> <li>Using ASL interpreters at events with large deaf populations.</li> <li>Making announcements in Spanish on the bus.</li> <li>Holding public meetings close to Metrorail stations or Metrobus stops.</li> </ul>
<b>Individual Campaigns</b>	<ul style="list-style-type: none"> <li>The Bus Livability Grant study (<i>Love Your Bus Stop</i>) conducted surveys at WMATA stations and other areas with existing Title VI groups, instead of holding typical public meetings.</li> <li>Silver Line Phase 1 outreach effectively took advantage of existing events for outreach, including road races and local festivals.</li> </ul>

Table 7 Current Public Outreach Practices – Gaps

Current Practices	Gaps
<b>Project-based public participation planning and outreach</b>	<ul style="list-style-type: none"> <li>Reinventing the wheel for each project (materials, outreach venues, community partners, staffing).</li> <li>Duplicating resources across departments.</li> <li>Public outreach is “second responsibility” for department staff.</li> <li>No common metrics for public outreach success.</li> <li>Lack of general forum for public input.</li> <li>Overlapping messages and timelines.</li> <li>Short timelines – not enough time or resources to plan innovative outreach and go to where people are (instead of holding public meetings).</li> </ul>
<b>Lack of project close-out and participant communication</b>	<ul style="list-style-type: none"> <li>The public views each event as their “one shot” to interact with WMATA, provides feedback unrelated to the project.</li> </ul>
<b>Using consultants for public outreach</b>	<ul style="list-style-type: none"> <li>Uncoordinated messaging and branding among projects.</li> <li>Outdated project websites.</li> <li>Missed opportunity to build WMATA’s outreach skills and external community relationships.</li> </ul>

There was widespread concern among the interviewed groups that the public outreach process at WMATA today is not centrally coordinated and therefore less effective than it could be for both staff inside the agency and the public. Interviewees noted that this lack of central coordination results in the inability to share best practices, lessons learned, and facilitate relationships with local residents and organizations from one project to the next. The reliance on consultants to plan and implement public



outreach has also resulted in a missed opportunity to build public participation expertise within WMATA. Additionally, many outreach activities occur during the same timeframes, often covering the same area or populations, without any coordination between project managers.

Interviewees cited the need for WMATA to communicate project results and decisions with people who participate in public outreach after decisions have been made. Members of the public who have attended WMATA events or meetings seemed skeptical that their voices were being heard. As such, they were less likely to get involved in the future. Interviewees also said that members of the public often felt that a project-based public meeting is their “one shot” to convey a message to WMATA, even when their feedback it is not related to the project.

### Board Interview Highlights – Selected Recommendations

- Include Board members in Public Outreach too.
- Be efficient in how we conduct public outreach. Pick places, venues, and strategies that reach large numbers of people, including Title VI protected populations.
- Achieve consistency in the process; let people know what to expect.
- Show that Metro is using public input.
- Use performance measures to understand when to make process changes.

## Recommendations

### *Create a Central Public Participation Office*

Interviewees strongly recommended the creation of a common outreach office for the agency that could help coordinate events, outreach to community-based organizations, and manage communication efforts and materials. Interviewees suggested the following functions and tasks for a new centralized outreach office:

- Manage WMATA’s brand with standardized document formats and visuals.
- Maintain a public participation checklist to ensure outreach efforts are compliant with the Public Participation Plan.
- Create a database of event venues and community partners.
- Provide a “toolkit” of public outreach options for different types of projects.
- Alert the Office of Equal Employment Opportunity to the need for interpreters and speakers of other languages.
- Serve as a “nerve center” for all outreach efforts at the agency.

### *Solicit General Feedback*

Interviewees suggested the creation of a recurring forum to allow members of the public to provide feedback to WMATA on the issues *they* are concerned about — such as fare increases or their interactions with WMATA staff – in addition to the existing opportunities to comment on WMATA’s projects, proposals, and plans. Even at project-specific events, it is important to let people know that,



just because their issue is not being addressed at that time does not mean it will not be addressed eventually. It is also important to let people know how to suggest ideas to WMATA. The Authority's Rider's Advisory Council hosted a very successful, agenda-less open house to hear feedback unrelated to current projects. Creating a process to solicit and respond to general feedback is also a critical need.

### *Build a Culture of Public Participation*

While eager for a new centralized public participation office, interviewees noted that such an office would require broad support and the explicit endorsement of WMATA's leadership. One interviewee noted that WMATA has successfully created a culture of safety at the agency. Could they take a similar approach to incorporating transparency and public participation into agency culture? To build a strong Authority-wide level of support for public participation, interviewees suggested the following strategies:

- Involve WMATA Board members in public engagement activities.
- Empower a new centralized public participation office with the authority needed to change the project-by-project culture among individual offices.
- Create a liaison position within a new centralized public participation office to coordinate efforts with marketing, advertising, communications, and language support.
- Recognize that the agency has to go to the public, not ask the public to come to the agency.
- Institutionalize a culture of public participation, and the need to go beyond the standard public hearing requirements.

### *Incorporate Inclusive Strategies Consistently*

Interviewees praised the recent Silver Line outreach and Bus Livability Study (*Love Your Bus Stop*) as examples of what works: no public hearings, "meeting people where they are," larger crowds, and more input than typical outreach projects. Building on the success of these efforts and their own experiences, interviewees suggested the following strategies be consistently implemented to improve public participation results and facilitate inclusive involvement:

- Hold outreach activities where people already are. Far more people can be reached at a bus stop or community festival than at a public meeting.
- Convert technical, text-based information to simple, easy-to-understand visuals.
- Hold events that speak to different cultures, languages and levels of literacy.
- Build and maintain a robust and "living" database of outreach partners, including CBOs, churches, schools, social service providers, and other local organizers.
- Tell public outreach participants how their input was used. Acknowledge they were heard, even if all of their ideas were not implemented.
- Create a standardized comment card or survey.
- Use direct mail, newsletters, and emails. Do not assume people will go to the website.
- Provide incentives to attend events: giveaways, SmarTrip cards, food, and children's activities.
- Engage bus operators and station managers in outreach activities.
- Create a list of preferred locations for public meetings.
- Establish relationships with media in all languages of WMATA constituents.



- Identify the communication needs of specific communities – i.e., hold special meeting with members of the Spanish-speaking community, instead of bringing them to an English-speaking meeting.
- Ensure that outreach staff are outgoing, compassionate people with whom constituents can relate culturally and linguistically.

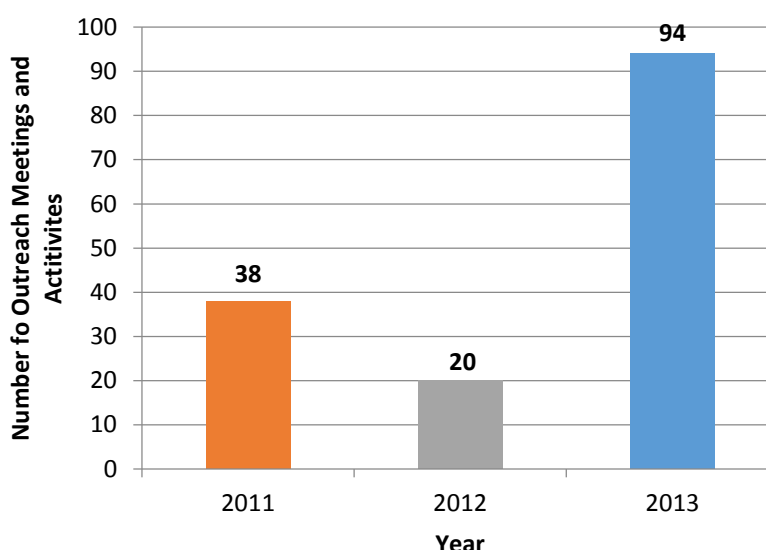
### *Staffing and Budgeting for Public Participation at WMATA Today*

Due to the current practice of planning and implementing public participation activities on a project-by-project basis, WMATA faces several key constraints in understanding the true cost and staffing needs for public participation. In many departments, public participation costs are a line item cost within a larger project's budget. As a result, the true cost of implementing public participation activities, including WMATA staff time, contractor labor, and materials, is not readily available. WMATA is incurring duplicate costs in the procurement of materials for public participation on an individual project basis and likely procuring services, such as translation and interpretation, at differing rates across projects. Without coordination across projects, costs across projects vary and WMATA does not realize any economies of scale.

In addition to the difficulty of tracking the full costs associated with public participation today, WMATA faces opportunity costs when staff in departments across the Authority spend significant amounts of time working on planning, implementing, or managing public participation, instead of focusing on their technical or primary workloads. While all departments and staff benefit from interaction with customers and have a responsibility to ensure that the Authority implements inclusive public participation, managing the minutia of planning for public participation may not make the best use of staff technical resources. The vast majority of WMATA staff does not have formal training or expertise in public participation, which leaves staff with few resources or sources of assistance to complete this very important part of their work.

The need to understand the true cost of public participation is pressing as the requirements to provide inclusive, accessible, and meaningful opportunities for public participation increased as a result of FTA C 4702.1B. The result of these increased requirements following the Circular's release in October 2012 are reflected in the rapid rise in the number of public participation events conducted in 2013, when the number of events more than tripled over the previous year. The number of events incorporated in this figure include events held by the Office of Planning, the Office of Equal Employment Opportunity, the Office of Bus Planning, the Office of External Relations, the Office of the Board Secretary, and WMATA Transit Police.



Figure 8 Annual Outreach Activity Volume, 2011-2013<sup>19</sup>

In looking at the average annual costs to conduct public participation activities in three of the more than 20 offices that have public involvement responsibilities - the Office of Bus Planning (BPLN), the Office of Equal Employment Opportunity (OEE0), and the Office of External Relations (EREL) - staff costs associated with public participation for these three departments alone are estimated to be approximately \$180,000.

Annually, the Office of Bus Planning conducts seven to eight bus line studies and conducts outreach for bus service changes to occur over the next three years. Each study is supplemented with consultant assistance for the public involvement process at approximately \$130,000 a year. The studies also incorporate a rider survey to aid in the development of recommendations, costing nearly \$40,000 each year. OEE0 assists planning managers with securing feedback from Title VI populations by conducting much of WMATA's outreach to community-based organizations. OEE0 also provides other support to CBOs, such as providing information on employment opportunities at WMATA, arranging travel training, and attending CBO events. Other associated functions include reviewing and managing document translations and providing interpretation at public outreach events. In the course of one year, OEE0 spends approximately \$20,000 for translation of public involvement materials and vital documents. OEE0 has incurred about \$2,600-\$4,000 each year for advertisements in the ethnic press and for outreach materials.

Finally, the Office of External Relations estimates they expend \$22,000 on outreach materials each year and \$100,000 for general contractor support.

In 2013 and early 2014, WMATA conducted several large-scale public participation activities that included a dozens of events (pop-ups, open houses, focus groups, etc.) across the service area. These campaigns included *Speak Up! It's Your Ride* (Public Participation Plan outreach), FY2015 Budget Outreach, Silver Line Phase I Outreach, and *Love Your Bus Stop* (Bus Livability grant outreach). These

<sup>19</sup> See Appendix A for a complete list of all outreach activities by calendar year.



large-scale outreach campaigns incorporated project brands, translated materials and interpreters, and marketing and communications strategies. They also utilized outreach strategies designed to engender high levels of participation and representative participation from minority, low-income, and limited English proficient populations.

Large-scale public outreach campaigns each cost between \$125,000 and \$200,000 in contractor time and materials, over and above the baseline expenditures for public outreach incurred on an annual basis. These costs include the development of outreach activities and materials, staffing, and the development of a report that synthesizes what was learned through the outreach process. Depending upon the number of large scale events occurring in a year, street teams that are specifically used to supplement WMATA staff can range in cost from \$100,000 - \$150,000. WMATA expects to continue to conduct these types of large-scale campaigns using the strategies outlined in this Public Participation Plan, with a number of already planned projects, including:

- Silver Line Phase II
- Regional Transit System Plan
- Environmental Studies
  - Heavy Rail Overhaul Maintenance Facility
  - Potomac Yard Metrorail Station
- Station Access Plans
- Annual Budget and Bus Service Planning Processes
- New Electronic Payments Program
- Paper Fare Card Elimination

Assuming normal business operations and two large scale projects, an estimated annual cost for the three aforementioned departments is outlined below:

**Table 8 Estimated Current Public Participation Expenses for Three Offices**

Office	Staffing*	Contractors	Materials	Translations
<b>BPLN</b>	\$ 52,000	\$130,000	\$40,000	
<b>EREL</b>	\$100,000	100,000	\$22,000	
<b>OEE0</b>	\$ 27,000		3,000	\$20,000
<b>(2) Large scale projects</b>		225,000	5,000	6,000
<b>TOTAL</b>	\$179,000	\$455,000	\$30,000	\$26,000
<b>GRAND TOTAL</b>		<b>\$730,000</b>		

*\*Base staff rates, does not include overhead.*

In addition to these large-scale outreach efforts, WMATA will also need to continue baseline public outreach activities. The Office of Planning (PLAN) and Real Estate (LAND) will conduct smaller studies that require public participation. WMATA Transit Police will continue outreach to the community and youth to increase rider safety, and the Office of Equal Employment Opportunity will continue both targeted outreach to community-based organizations and broader community outreach aimed at providing information to ensure access to employment opportunities at WMATA.



In addition to contractor time and materials, documents must be translated into the major languages spoken in the service area. Between 2011 and 2013, WMATA spent approximately \$60,000 to translate vital documents and outreach documents. This excludes the costs of translation for individual public participation activities that were incorporated into project budgets.

The number, scale, and scope of large-scale public participation activities that will be required in the near-term will likely present a staffing challenge for WMATA. The use of contractors can continue to aid in filling this gap, but an over-reliance on contractors is resulting in duplicating costs. The use of contractors also does not obviate the need for WMATA staff involvement in all aspects of the planning, management, and implementation of public participation. In any given public participation activity, coordination across a number of departments, including Marketing, Communications, External Relations, Equal Employment Opportunity, Customer Research and others, is required for various approvals and assistance with materials, translations, and surveys. Individual WMATA staff with special language and cultural skills are often recruited to serve at events requiring their skills.

Staff whose primary responsibilities are not public participation will be asked to take on an even greater workload related to public participation to ensure that *all* of WMATA's activities requiring public participation, whether large-scale campaigns or project-level outreach, meet the needs of the Authority in coming years under the current structure. WMATA would benefit from adopting the coordinated staffing and budgeting approach to public participation taken by many of its peer agencies across the country.

### *Staffing and Budgeting for Public Participation – Peer Benchmarking*

The Best Practice Review conducted during the PPP's development process identified significant differences between the practices of peer agencies and WMATA in regard to the staffing, coordination, and investment in public participation. Many of WMATA's peers have dedicated offices or departments, budgets, and staffs that plan and implement public participation activities. These offices and staffs typically work in conjunction with project staff or as a part of a project team. They are also responsible for general community outreach. Staff in these offices has education, training, and experience in public and government and community relations.

Peer agencies with dedicated public participation staff also budget for public participation outside of individual projects. This allows them to develop a holistic understanding of the cost of public participation. For example, Los Angeles WMATA's Constituent Programs Management implements all project-based public participation programs and estimates that public participation accounts for between 10 to 20 percent of a typical total project cost.

Table 9 summarizes the office and staff responsibilities at peer agencies, as well as the number of staff dedicated to planning and implementing public participation activities agency-wide.



Table 9 Public Participation Dedicated Staff at Peer Agencies

Agency	Department/Staff Responsibilities	Staff Size
<b>Bay Area Rapid Transit</b>	The Government and Community Relations department is responsible for staffing an advisory committee of community-based organizations and work with Planning Department Project Managers to implement public outreach.	Four staff focused on Title VI/Environmental Justice compliance and public outreach.
<b>Chicago Transit Authority</b>	The Government and Community Relations liaisons with local elected officials and community groups on an ongoing basis. They also organize public participation for every capital project or planning study in a collaborative effort with project management staff from the Service Planning or Capital Projects Departments.	Seven to eight full-time staff members
<b>Los Angeles WMATA</b>	Regional Communications Programs includes four component departments, each of which has individual roles in facilitating relationships with local elected officials, planning public participation, implementing public participation, and safety communications. The Constituent Programs Management department develops all individual study or project public participation plans, including identifying staff with linguistic and cultural skills needed for each study.	
<b>Metropolitan Council</b>	WMATA Transit (the transit authority operated by Metropolitan Council) and the Metropolitan Council each has dedicated public engagement staff, and they also use contractors to provide specific cultural and linguistic expertise and staffing for public participation on an as-needed basis.	Three dedicated public involvement staff at WMATA Transit and three dedicated public involvement staff at Metropolitan Council
<b>New York City Transit</b>	Division of Government and Community staff is responsible for liaising with organized constituencies, neighborhood groups, block associations, and Community Boards. Funding for public outreach is part of the Division's budget. There is no isolated budget for the development of public participation plans or outreach for specific projects.	Twelve staff, a Vice President, and additional administrative and support staff
<b>Southeastern Pennsylvania Transit Authority (SEPTA)</b>	The Public and Government Affairs Division is responsible for devising and implementing public participation activities for all service planning or other planning projects. They work with community-based organizations as needed on a project-by-project basis.	Six staff dedicated to public outreach



Agency	Department/Staff Responsibilities	Staff Size
<b>Sound Transit (Puget Sound Regional Transit Authority)</b>	The Community Outreach department is responsible for developing and implementing the public outreach. Each project's outreach strategy is tailored to meet the needs of the affected populations and is designed with input from other departments, including Planning, Environment and Project Development, Government Relations, and Diversity Programs.	
<b>TriMet</b>	The Marketing and Customer Information Division is responsible for the overall Title VI Program coordination and public engagement.	Two full-time public engagement staff and a director

## Section 2: Recommendations

### *Immediate Strategies*

A synthesis of the findings of the WMATA staff and Board interviews and a staffing and budget analyses provided the basis for the identification of five overarching procedural gaps. A set of immediate strategies required to address each gap has been identified; these strategies ensure that WMATA's public participation activities will be compliant with the Circular and achieve the desired outcomes of this PPP. WMATA will be accountable to FTA for ensuring that the procedural strategies adopted by the Authority in the Public Participation Plan are successfully implemented.

The identified gaps and strategies are summarized in Table 10. This table also provides the planned implementation year for each of the required strategies. Details on each gap and strategy follow the table.



Table 10 Implementation Plan for Required Immediate Strategies

Gap	Strategy	Strategy Implementation Year	
		FY2015	FY2016
<b>1. Inconsistent use of public participation strategies and implementation.</b>	1A Public Participation Toolkit Implementation and Web-Based Resource Portal	✓	
	1B Public Participation Training	✓	
<b>2. Lack of coordinated oversight and internal public participation expertise.</b>	2A Public Participation Manager	✓	
	2B Points-of-Contact System	✓	
	2C Public Outreach Branch		✓
	2D WMATA Information Persons Program Enhancement		✓
	2E On-Call Consultant Assistance		✓
<b>3. Limited, ad-hoc relationships with community-based organizations (CBOs).</b>	3A Ongoing, Organized CBO Engagement	✓	
	3B CBO Outreach Committee		
			✓
<b>4. Absence of performance measurement and accountability for public participation outcomes.</b>	4A Implement Performance Measurement – Public Participation Manager Role	✓	
	4B Performance Measurement	✓	
	4C PPP Monitoring and Updating	✓	
	4D Updating departmental Business Plans		✓
<b>5. Absence of an in-person forum for soliciting general public feedback.</b>	5A “No Agenda” Community Outreach		✓
	5B Online Forums (MindMixer and Online Chats)	✓	



**Gap 1: Inconsistent use of public participation strategies and implementation**

Currently individual departments coordinate and implement their own project-based outreach at WMATA.

**Strategy 1A: Implement the Public Participation Toolkit and Web-Based Resource Portal**

The Public Participation Plan Toolkit, which includes a standard Public Communications and Outreach Plan (PCOP) project planning format, is a component of the Public Participation Plan. The Toolkit and its PCOP provides a framework for planning and implementing consistent, high-quality, and inclusive public participation activities. The Toolkit also includes a set of public preference matrices and access to both passenger survey data and the MetroView application to help project managers identify demographic groups in the study area and allow them to ascertain quickly effective methods of outreach for specific Title VI protected population. Through the use of the Toolkit, WMATA will ensure that all public participation activities will be both inclusive in nature and consistent in quality.

WMATA is committed to implementing the use of the Toolkit throughout the Authority. This will include development of the Toolkit materials (including the PCOP and other project forms) in an easily accessible web-based format. Web-based forms, completed PCOPs and the associated event plans, and event summaries will be automatically cataloged in a central location for review and tracking purposes. Following approval of the Public Participation Plan, the Office of External Relations will take on implementation of the PCOP and Toolkit immediately.

**Strategy 1B: Public Participation Training**

To ensure the successful, uniform adoption of the Toolkit and an Authority-wide understanding of Title VI requirements for public participation, WMATA staff with public engagement responsibilities will be trained on the use of the Toolkit and the PPP.

**Gap 2: Lack of coordinated oversight and internal public participation expertise**

Today, there is no central resource with oversight for public participation activities or public participation planning, assistance, and expertise at WMATA.

**Strategy 2A: Public Participation Manager**

A Public Participation Manager position will be established in the Office of External Relations to provide a central point of oversight for all public participation activities, as well as assistance and training on the use of the Toolkit. This position will also manage WMATA's staffing and budgeting needs for public participation. The Public Participation Manager will be responsible for ensuring that all Title VI Public Participation Plan strategies, procedures, and performance reporting requirements are successfully met.

The Public Participation Manager will be responsible for the following:

- Provide assistance with the development of individual project PCOPs and review all plans prior to implementation to ensure appropriate strategies and consistent application of Toolkit strategies and recommended practices.
- Serve as the primary staff resource for public participation at WMATA and work closely with all departments that conduct public participation activities.



- Maintain and periodically circulate the list of all planned public participation activities at WMATA.
- Facilitate the involvement of WMATA senior leadership and WMATA Board members in public participation activities for both individual projects and recurring events.
- Conduct training on the use of the Toolkit and provide other public participation specific capacity building trainings to WMATA staff.
- Maintain lists of employees available to participate in public participation activities and provide a basic training on public participation to these employees (see Strategy 2C).

The Public Participation Manager should be selected and identified on the basis of his or her experience conducting public participation, and ideally should be someone who has formal training or certifications in public participation or public and community relations.

### ***Strategy 2B: Points-of-Contact System***

To meet the immediate need to introduce internal coordination of public participation, WMATA will develop a central point-of-contact (POC) system for coordinating public participation. Within each department, designated WMATA POCs for public participation will be responsible for providing information on planned public participation activities, participate in semi-annual public participation knowledge exchange meetings, and work with the Public Participation Manager and other relevant staff to ensure that the Toolkit is consistently applied. Each department's public participation POC will assume these duties in addition to their existing roles. As a result of the scope of these roles, the POC will necessarily be confined to meeting the most immediate needs for internal coordination. The POC System will be discontinued when Strategy 2C, EREL's Public Outreach branch, is implemented.

### ***Strategy 2C: Expand the Office of External Relations with the creation of a Public Outreach branch.***

The Public Participation Manager and the departmental-level POCs are intended to provide an immediate but temporary solution to the lack of coordinated oversight, organizational knowledge, and capacity issues that confront WMATA with regard to public participation. Ultimately, there is a need for a new branch within the Office of External Relations to provide *professional* public participation oversight, planning, implementation, and performance measurement for WMATA departments. This branch will remove the responsibility for implementing public participation from individual project managers and teams and provide a public participation expert to serve as the lead for public participation on individual projects and studies within WMATA. This branch would also provide oversight, quality control, performance management, and greater transparency.

EREL public outreach staff will be assigned to individual projects and manage all project-based public participation activities, as well as provide overall oversight and coordination for public participation within WMATA. The Office of External Relations Public Outreach branch staff would work with WMATA project managers to design and implement public participation plans tailored to the individual projects, allowing WMATA staff in other departments to focus on their core responsibilities. However, WMATA project managers would still act as "subject matter experts" and actively participate in outreach. In addition, outreach would still be an important part of each department's business plans (strategy 4D).

By providing trained, professional public participation staff with the specific skills set, knowledge, and expertise to manage public participation activities, establishing the branch of Public Outreach will address the organizational and staffing limitations that currently hinder WMATA from achieving



consistent and high-quality public participation. The branch will be managed by the Public Participation Manager and include a staff of four to six Outreach Specialists. Outreach Specialists will be responsible for planning and implementing project-based public outreach plans, providing assistance with tracking project performance and contributing to updates of the Public Participation Plan's Toolkit and Project Communications and Outreach Plan. In addition, the EREL outreach team will work with OEE's CBO Outreach Manager to develop CBO outreach strategies for projects (See Strategy 3B).

At the outset of each project, public outreach (PO) staff will meet with individual project managers and work with them to understand the project purpose and public participation needs. PO staff will assist as needed in the development of the project's PCOP, securing the appropriate staffing, coordinating the project's public participation schedule with other WMATA activities as needed, and overseeing the PCOP's implementation. PO staff will be assigned to individual departments within WMATA to ensure continuity and to allow PO staff to develop a deeper understanding of the work of a department and the types of public participation activities that best meet their needs. However, very large projects (for example, the *Momentum* strategic planning process) will likely involve a plurality of PO staff members in their public participation planning and implementation. Contractors may be used to assist with the development of public participation plans and activities as needed. However, contractors will work under the guidance of PO staff when they are utilized.

#### ***Strategy 2D: WMATA Information Persons Program Enhancement***

WMATA's WMATA Information Persons (MIPs) program identifies employee volunteers who aid operations staff by assisting customers during major track work and special events. A program similar to MIPs, or an enhancement to the existing MIPs program, is needed to identify staff to assist with broad-based public involvement activities in the future. This program must identify WMATA staff with various cultural and ethnic backgrounds. The program must also identify staff who are native or fluent speakers of languages other than English who are willing to assist with public participation. During the public participation activities used to solicit input on the development of this PPP, WMATA staff from Rail Operations, MetroAccess, Planning, and Bus Planning who were native speakers of languages other than English, but not otherwise involved in the project, staffed events where their particular linguistic and cultural expertise were needed. Having a WMATA employee who spoke the language was much more genuine and helpful for public participants than use of a contracted translator.

Staff members who participate in this MIPs-like program will receive training in the principles and practices of public participation from the Public Participation Manager. WMATA must also establish a way to recognize and remunerate staff participating in this program, as is done with the MIPs program, as they are taking on duties above and beyond their daily responsibilities.

#### ***Strategy 2E: On-Call Consultant Assistance***

WMATA will issue an on-call contract for consultant assistance with public participation to provide additional public participation expertise, staffing, and professional translation and interpretation services. By creating a single, on-call contract specific to public participation, WMATA will have a qualified set of firms that the Authority can utilize as needed to provide assistance with the implementation of public participation. The on-call contract will encompass firms that can provide support in staff training and logistics planning, 'street teams' that can assist with providing information and soliciting input at outreach events, and providers of translation and interpretation services. It will



also provide WMATA with access to firms that can assist with specific marketing and communications needs, including illustrations, infographics, specific media, and ethnic media expertise.

There is a particular need for WMATA to access street teams through an on-call contract. Street teams are outreach-oriented, trained brand-ambassadors that are highly effective in engaging the public at events in the community (e.g., Metrorail Stations, community festivals) and are less costly than using staff or contractors whose primary responsibility is the planning and design of public participation. Given the number and scale of planned public participation activities, street teams are particularly needed in the near-term to provide staff augmentation.

Today there is no identified mechanism for procuring translation and interpretation services at WMATA. Some offices have contractors build these services in as direct expenses, while others directly budget for translation and interpretation. Outside of individual projects, WMATA needs a mechanism to procure translation and interpretation services when needed. WMATA will be able to secure standardized pricing for these services through their incorporation in an on-call contract. **This service is also needed so WMATA can meet the Title VI obligations of its Language Assistance Plan, which requires that all vital documents and outreach documents be translated into the foreign languages spoken by large numbers of limited English proficient populations in the WMATA service area.**

The use of an on-call contract will also enable WMATA to easily track public participation expenses, and the availability of this information will allow the EREL Public Outreach branch to appropriately and cost-effectively plan for staff and budget for future public participation efforts. It will also provide WMATA with much needed flexibility in securing the specialized services and skills required to complete public participation activities on an as-needed basis.

### ***Gap 3: Limited, ad-hoc relationships with Community-Based Organizations***

Today, WMATA personnel from the Office of Equal Employment Opportunity, the Office of External Relations, the Office of Bus Planning, and others work with different CBOs on discrete projects on an as-needed basis. However, there is no coordination between offices to ensure continuity in communications, nor is there formal coordination to ensure that the CBOs are not overburdened by multiple requests from various WMATA offices.

### ***Strategy 3A: Ongoing, Organized Community-Based Organizations Engagement***

A database of 200 Community-Based Organizations (CBOs), business organizations, and city and county social service agencies spanning the WMATA service area was created to support the implementation of the Public Participation Plan and to provide a baseline resource for future outreach activities. Of these 200 CBOs (see Appendix B – Community Based Organization List), 87 directly participated in the development of the Public Participation Plan through an online survey or focus group. The Office of Equal Employment Opportunity (OEEO) will assume the responsibility of managing CBO engagement and relationship building. These relationships will be fostered, starting with a follow-up contact to provide information about the PPP and how CBO input was used in the PPP development.

The primary responsibilities of OEEO staff, in relation to their CBO duties, are recommended to be as follows:



- Serve as the primary point of contact for community based organizations and manage WMATA's ongoing, organized CBO engagement.
- Update the information in one coordinated CBO database with contact information and other data, and develop a WMATA-specific profile for each.
- Manage any questions or feedback that a CBO contact might need directed to specific WMATA departments (i.e., be the initial point of contact, direct them to the appropriate person to receive an answer, and follow-up with the CBO contact to ensure that their question was addressed).
- Provide CBOs with informational materials and/or travel training as requested. (Travel training may be provided as budget is available.)
- Attend meetings at CBOs and coordinate the attendance of appropriate WMATA staff (e.g., Bus Planning, MetroAccess).
- Maintain a current list of the CBOs' calendars of events.
- Attend the special events and/or fundraisers of CBOs within their portfolio when possible and applicable.
- Conduct an annual survey of CBO's regarding the effectiveness of outreach.

### ***Strategy 3B: CBO Outreach Committee***

In addition to conducting ongoing outreach to CBOs and soliciting their involvement in relevant projects and plans as appropriate, WMATA will seek to create a CBO Outreach Committee. The Committee will be tasked to collaborate with local CBOs to develop strategies that are tailored to specific project proposals, to ensure meaningful, broad-based public participation, and to build a new avenue for knowledge transfer between WMATA and CBOs. The CBO Outreach Committee would be created and staffed by personnel from the newly formed PP branch and the OEEU. As a result, the Committee cannot be implemented until the branch is established in FY2016.

The CBO Outreach Committee will be comprised of the leaders from a rotating group of CBOs who each serve staggered terms. Both geographically and by type of CBO, the CBO Outreach Committee will represent a proportional cross-section of WMATA's service area. CBO Outreach Committee meetings will be held on a quarterly basis and will likely cover the following topics:

- General transit concerns as expressed by the CBO clients/constituents to the CBO leadership.
- An informational presentation by WMATA staff on projects or plans that are in the near-term pipeline.
- A discussion of the potential impact of those projects or plans on the clients/constituents of the CBOs.
- A discussion of considerations and methods for executing the public participation process for the enumerated projects or plans.
- A review of the issues and strategies raised at the previous committee meeting and their resolution and/or results of their implementation.
- WMATA and CBO event announcements.

At least one member of WMATA's senior management team and/or a WMATA Board member will attend each CBO Outreach Committee meeting. Depending on the projects and/or plans to be



discussed, the relevant WMATA Assistant General Manager or Director should attend. The presence of high level WMATA staff increases the weight of the committee’s recommendations, provides knowledge transfer opportunities to key decision-makers, and elevates the prestige and public image of the committee overall. Staff members from the OEEO and PP branch would be present at all meetings to act as meeting facilitators.

During the *Speak Up! It’s Your Ride* outreach process, CBOs expressed a general concern as to whether WMATA will properly appreciate the value of their time and input as the Authority takes a more proactive approach to building these relationships. Because of this feedback, WMATA will find appropriate ways to express gratitude for CBO contributions in a celebratory manner.

**Gap 4: Absence of performance measurement and accountability for public participation outcomes**

Although each project team and department has their own internal assessment (either formal or informal) of their outcome of their public participation activities, WMATA currently lacks performance measures to determine what constitutes successful outreach on a project-basis or for the Authority as an organization.

**Strategy 4A: Implement Performance Measurement – Public Participation Manager Role**

WMATA’s Public Participation Manager will implement the PPP’s performance measurement program as described in Chapter 6. Performance measurement is critical to documenting WMATA’s compliance to the Circular. By allowing the Authority to document the effectiveness of its outreach efforts, measurement will also allow WMATA to realize the benefits of the investment made into the development of the PPP Toolkit and Public Communications and Outreach Plan.

**Strategy 4B: Performance Measurement**

A set of individual project performance measures were developed for use in the Project Communications and Outreach Plan contained in the Toolkit, and these measures will be used by individual project managers at WMATA as appropriate for their projects. They will then be centrally tracked, aggregated, and analyzed by WMATA’s Public Participation Manager. The manager will also be responsible for the tracking and for producing an annual review of the Public Participation Plan’s Performance Measures, as described in Chapter 6.

In addition to measuring performance, the Public Participation Manager will ensure that recurring general concerns raised during public participation activities are addressed by the appropriate departments within WMATA. The Public Participation Manager will ensure that general concerns that are frequently occurring are made known to the relevant departments at WMATA and that the public receives information about how each concern was addressed. For example, if WMATA receives a complaint about interactions with WMATA staff or the service provided by particular bus route, the Public Participation Manager would provide this information to the relevant personnel at WMATA and ask that they both address this issue and provide an explanation of how the it was addressed that can be reported to the public. The role of the Public Participation Manager does not replace the role played by WMATA’s Customer Service department in accepting and addressing individual public complaints but instead focuses on ensuring that recurring and systemic issues raised during the public involvement

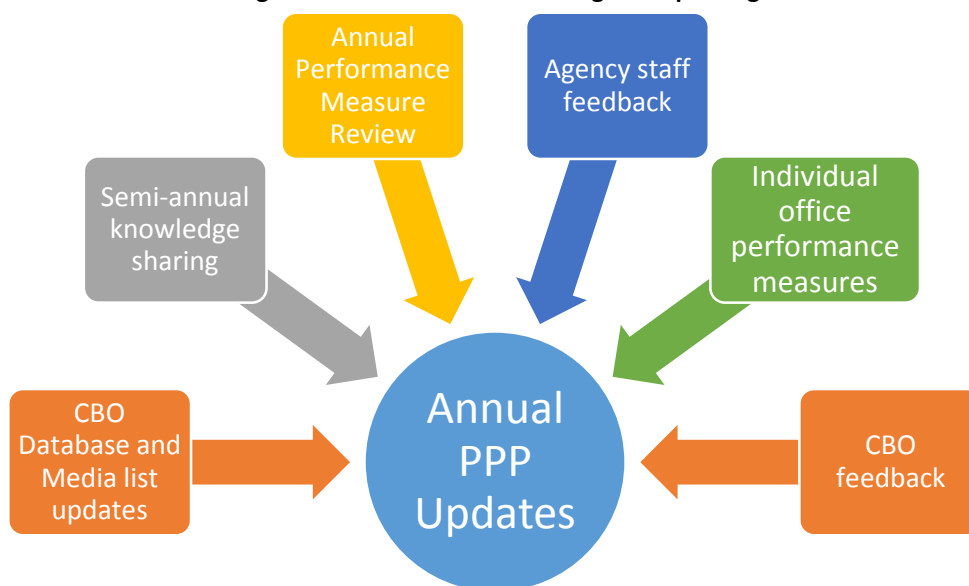


process are addressed. The Public Participation Manager will establish a threshold for the number of times an individual issue is brought up to determine when it must be addressed.

#### **Strategy 4C: Monitor and Update the PPP**

The WMATA Public Participation Manager will schedule and lead semi-annual, agency-wide public participation knowledge exchange meetings and oversee the annual<sup>20</sup> update and distribution of the PPP Toolkit to all departments and decision-makers within WMATA, incorporating new lessons learned during these meetings and from other interactions with agency staff and CBOs. The Public Participation Manager will also be responsible for leading the triennial PPP update and FTA submittal.

**Figure 9 WMATA PPP Monitoring and Updating Process**



#### **Strategy 4D: Departmental Business Plans**

Each department (where applicable) within the agency will integrate outreach into their own departmental business performance plans, ensuring that every department with public engagement responsibilities within WMATA is accountable for public participation outcomes. For example, within WMATA’s Momentum Strategic Planning framework, departments are assigned strategies based on the Authority’s four strategic goals. A public participation strategy for a department whose activities include public participation may be “Work with the Office of External Relations Public Outreach branch to ensure that the Public Communications and Outreach Plan process is effectively completed and that the Public Participation Plan’s goals are met.” Implementing actions to achieve this strategy may include items related to achieving the Public Participation Plan’s performance measures described in Chapter 5.

<sup>20</sup> Minimum annual; other toolkit updates may occur as needed.

**Gap 5: Absence of an in-person forum for soliciting general public feedback**

WMATA currently does not provide regularly occurring in-person opportunities for the public to provide general comments on the transit issues, concerns, and suggestions that matter to them. As a result, many public participation activities for individual plans or projects attract participants that wish to speak to WMATA on topics that are not relevant to the discussion.

**Strategy 5A: “No Agenda” Community Outreach**

Following the creation of the Public Outreach branch within the Office of External Relations, staff will establish regularly occurring community outreach events that feature no structured agenda but are led by participant concerns and suggested topics. These events can include both “instant” community outreach events, such as outreach at a transit center or open house, as well as community meeting style events. At community meeting events, participants will be asked to provide topics for discussion at the outset of the meeting, and then all participants will select the topics for discussion through a vote. Several venues for these types of events were suggested by participants in the *Speak Up! It’s Your Ride* outreach, including homeless shelters, community-based organizations meetings, and at Metrorail stations.

**Strategy 5B: Online Forums**

WMATA will make use of online resources to facilitate rider-led suggestions and feedback. The Authority currently hosts a periodic “Lunch Talk Online Chat” that provides an opportunity for WMATA riders to ask questions and interact in real-time with WMATA officials during weekday lunch hours. While this is not a strategy that is likely to reach low-income or limited English proficient populations, these chats do provide an unstructured, accessible method for riders to express concerns unrelated to specific projects. WMATA has also successfully used the MindMixer tool to solicit feedback on individual projects, and a MindMixer forum for general feedback will be established.

**Summary of New Responsibilities and Recommended Staffing**

The strategies described in this chapter meet the Federal Transit Administration’s requirement that the Public Participation Plan explicitly describe the proactive strategies and procedures that will facilitate the desired, inclusive public-participation outcomes. Although there are a number of efficiencies to be gained in consolidating public participation planning, implementation, and materials management, these strategies represent an addition of staff responsibilities over and above WMATA’s current staff resources. The table below presents an overview of the additional staff responsibilities that must be assumed and which staff position(s) will be assuming each responsibility.



Table 11 WMATA's Public Participation Responsibilities, FY2015-FY2017

	Public Participation Responsibilities	Staff Responsibility		
		Current	FY2015	FY2016
1	Maintain a list of upcoming, recurring, and planned public participation activities and provide this list to all departments and senior leadership on a recurring basis.	Individual departments. Some campaigns tracked by EREL, past kept in spreadsheet by OEEO.	EREL (Public Participation Project Manager).	EREL – Public Outreach Branch (Public Participation Project Manager/Director).
2	Facilitate the involvement of WMATA senior leadership and WMATA Board members in public participation activities for individual projects as well as recurring events.	N/A	EREL & CSCM AGM/SECT.	EREL – Public Outreach Branch & CSCM AGM/SECT.
3	Ensure that all public participation materials are branded appropriately, written to PPP standards, and reviewed.	Individual departments.	Individual departments with the help of EREL (Public Participation Project Manager) & MKTG.	EREL – Public Outreach Branch (Public Participation Project Manager/Specialists) & MKTG.
4	Ensure that all public participation materials are translated into the appropriate languages	Individual departments, though OEEO is responsible for identifying and translating documents deemed to be vital and providing quality review of translated documents.	Individual departments with the help of EREL (Public Participation Project Manager) & OEEO.	EREL - Public Outreach Branch (Public Participation Specialists) OEEO & MKTG.
5	Provide training to staff on the use of the Public Communications and Outreach Plan.	N/A	EREL (Public Participation Project Manager).	EREL - Public Outreach Branch (Public Participation Project Manager/Director).
6	Provide assistance departmental points-of-contact to ensure quality public participation plans and implementation. (FY2015 only.)	N/A	EREL (Public Participation Project Manager).	EREL - Public Outreach Branch (Public Participation Specialists).
7	Plan public outreach events and meetings, including scouting locations.	Individual departments, some with contractor help.	Individual departments with guidance from EREL.	EREL - Public Outreach Branch (Public Participation Specialists).
8	Manage the use of the MIPs Enhancement Program.	Basic program run by EREL. Language assistance run by OEEO.	Basic program run by EREL. Language assistance run by OEEO.	EREL - Public Outreach Branch (Public Participation Project Manager/Specialists) Language assistance run by OEEO.



	Public Participation Responsibilities	Staff Responsibility		
		Current	FY2015	FY2016
9	Manage the public participation on-call contract and the use of public participation contractors.	Outreach contractors managed by various departments.	Outreach contractors managed or reviewed by EREL/individual departments.	EREL - Public Outreach Branch (Public Participation Project Manager/Specialists).
10	Maintain a list of recurring regional and local events (e.g., the Cherry Blossom Festival, Fall for Fairfax, Hispanic Festival, etc.) and participate in a subset of recurring regional events each year to provide general information and solicit general feedback from the community.	EREL (Special Events Manager) maintains list of large-scale events. MKTG attends some.	EREL (Special Events Manager) maintains list. MKTG/EREL/individual departments participate.	EREL (Special Events Manager) maintains list, EREL - Public Outreach Branch (Public Participation Project Manager/Specialists) coordinates participation.
11	Attend a set goal of CBO meetings per quarter to proactively seek general input and coordinate the attendance of appropriate WMATA staff (e.g., Bus Planning, MetroAccess) if needed. When possible and applicable, attend the special events and/or fundraisers of CBOs.	Sporadic participation, OEEO, and various departments.	OEEO (Sr Workforce Diversity & Compliance Officer).	OEEO Sr. Workforce Diversity & Compliance Officer Workforce Diversity & Compliance Specialist and other staff, as required.
12	To the extent possible, manage any questions or feedback that a CBO contact might need directed to specific WMATA departments (i.e., be the initial point of contact, direct them to the appropriate person to receive an answer, and follow-up with the CBO contact to ensure that their question was addressed).	OEEO.	OEEO (Sr Workforce Diversity & Compliance Officer) and other relevant departments.	OEEO Sr. Workforce Diversity & Compliance Officer Workforce Diversity & Compliance Specialist and other staff, as required.
13	Maintain a list of CBO committee meetings and calendars of events that occur on a regular basis that are appropriate for WMATA to attend.	Sporadic participation, OEEO, and various departments.	OEEO (Sr Workforce Diversity & Compliance Officer).	OEEO Workforce Diversity & Compliance Specialist.
14	Update the CBO database with contact information and other data for their assigned CBOs.	N/A	EREL (Public Participation Project Manager) & OEEO (Sr Workforce Diversity Mgr).	EREL - Public Outreach Branch (CBO Manager).
15	Establish and staff a community-based organization outreach committee that will provide input to WMATA on an ongoing basis.	NA	OEEO in partnership with EREL.	Coordinated by OEEO.
16	Solicit the involvement and feedback of CBOs as needed on a project basis.	As needed, coordinated by OEEO.	Coordinated by OEEO.	Coordinated by OEEO.



### *Public Participation Transition, Staffing, and Budgeting*

Table 12 summarizes the recommended staff positions necessary to implement the identified strategies in FY2015 and FY2016. During FY2015, WMATA will identify the Public Participation Manager, and this staff person will participate in the hiring two Outreach Specialists and in preparing for the establishment of the Public Outreach branch in FY2016.

**Table 12 EREL Public Outreach branch Staff Summary**

Hiring Fiscal Year	Staff Positions	Number of Positions	Estimated Annual Salary*
<b>FY2015</b>	Public Participation Manager	1	\$110,000
	Outreach Specialist	2	\$116,000
<b>FY2016</b>	Outreach Specialist	4-6	\$332,000 - \$498,000
<b>FY2016</b>	Workforce Diversity & Compliance Specialist	1	\$83,000

*\*Base salary rate, not including other expenses*

In FY2015, the Office of External Relations will serve the lead role in implementing the Public Participation Plan, ensuring the development of the Project Communications and Outreach Plan (PCOP) and Toolkit as web-based resources for project managers, and providing training on the PCOP process as needed throughout the Authority. External Relations will be responsible for hiring and training three staff persons: the Public Participation Manager and two Outreach Specialists. External Relations will also work with the staff in these roles to implement the interim department POC strategy, as well as implement the Public Participation Plan's PCOP and Toolkit process. The Office of Equal Employment Opportunity has the primary responsibility for working with CBOs and will continue to establish and nurture relationships with them and serve as their initial point of contact with WMATA.

In FY2015, External Relations will also work with the Office of Performance to ensure that public participation performance metrics are incorporated into all department business plans (Strategy 4D), so as to ensure that, as the Public Participation Plan is implemented, accountability for public participation performance is established throughout WMATA.

In FY2016, the Public Outreach branch will be established as part of the Office of External Relations and the Public Participation Manager will move into a role of oversight for all public participation activities at WMATA to ensure consistency, quality, appropriate staffing, and budgeting. As Outreach Specialists are hired, the departmental POC system will be phased out.

The exact number of public participation specialists needed to staff the Public Outreach branch remains undetermined. The number of public participation specialists hired will depend on the number and scope of planned public participation activities in the coming years, as assessed by the Public Participation Manager during the work to create the branch. However, given that there are more than 20 offices within WMATA that conduct public outreach today, at a minimum at least six specialists should be hired in total. As shown in Table 12 a range of four to six specialists is assumed for FY2016.



In FY2016, OEE0 will begin the work to establish a CBO Outreach Committee and hire an additional specialist to assist with further CBO relationship building.

Figures 10 and 11 provides a visual representation of how the transition of public participation roles and responsibilities at WMATA will occur in FY2015 and FY2016.



Figure 10 Public Participation Plan Implementation  
FY2015-FY2016 Staff Structure

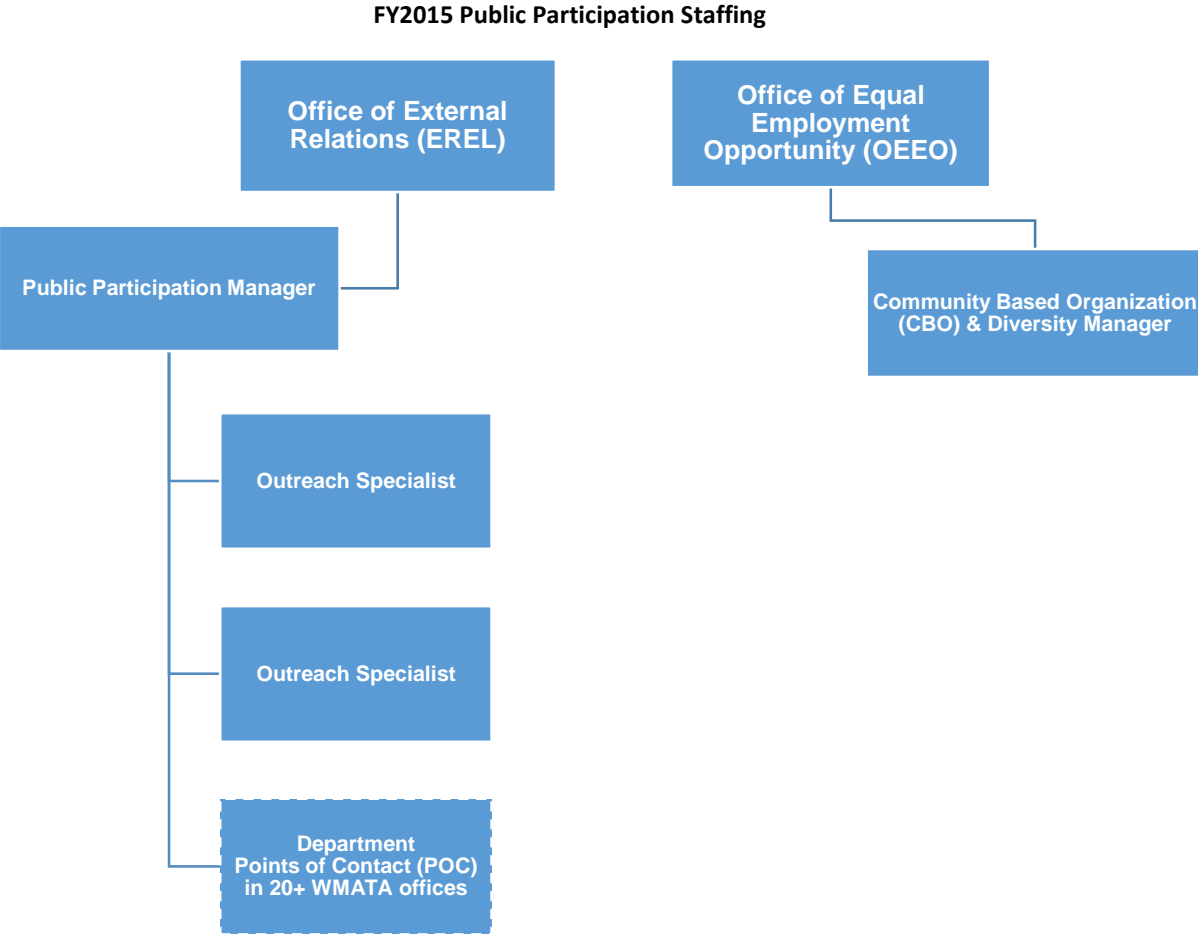
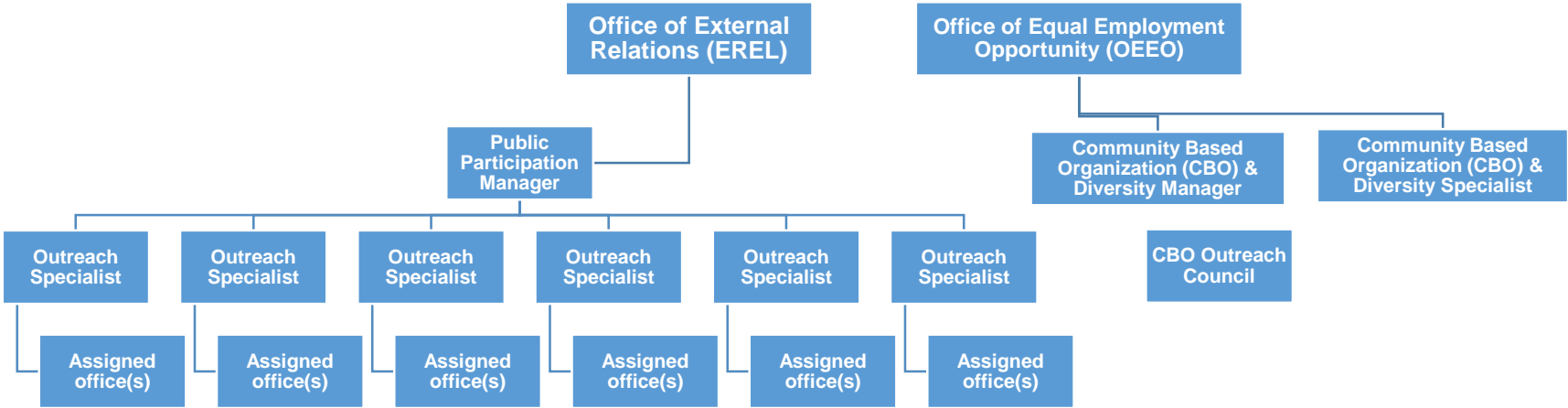


Figure 11 FY2016 Public Participation Staffing



Public participation expenditures have risen rapidly in recent years, more than doubling in the past two years. However, public participation costs are highly dependent upon the number of projects requiring public outreach and the size and geographic scale of those projects. Therefore, public participation costs can vary. A draft budget for the Public Outreach branch was estimated using knowledge of recent public participation expenditures, including contractor expenditures.

In addition to the staff, budgeting for the Public Outreach branch should include the following annual expenditures, ranging from \$300,000 to \$365,000:

- \$5,000-\$10,000 basic capital needs: tents, tables, dollies, and other pieces of equipment that will be used on a recurring basis. These assets will be replaced as needed, and the initial capital purchases should last for several years. Depending on availability, specific vehicles may need to be identified for this branch's use only, which may be an additional cost.
- \$170,000-\$200,000 annually for street team support for three large-scale projects that require a dozen or more public participation over a period exceeding 30 days. *Street team support will be accessed as needed through the public participation on-call contract.*
- \$100,000-\$120,000 annually for professional interpretation services for public meetings, focus groups, and meetings with community organizations. *Interpretation support will be accessed as needed through the public participation on-call contract.* This also includes professional translation services for public outreach materials and translating surveys for public participation activities.
- \$25,000-\$35,000 annually for materials, including items such as printed material for individual outreach campaigns, WMATA system information (Rider Guide, Metrobus Schedules, SmarTrip® information), giveaways, incentives (free SmarTrip® cards without or without value), snacks, and other supplies needed for individual events.

Budgets in branches/ departments other than Public Outreach, such as marketing and research, will also need to be adjusted to cover costs for the increase in public outreach:

- Additional \$2,500-\$5,000 annually for registration for a number of recurring general outreach opportunities (e.g., community festivals).
- An additional \$100,000 annually for advertising public participation opportunities in local media, including local foreign-language media (newspaper, Internet, and radio). *This figure encompasses advertising costs that WMATA currently expends across other departments.*

### *Public Outreach Staff Qualifications*

Recruiting staff with the appropriate education and experience in fields related to public participation-linguistic skills, intercultural communication skills, and project management skills will be critical to ensuring the efficacy and success of the Public Outreach branch. Recruitment activities must ensure that the staff selected are both technically proficient and reflect the diversity of WMATA's service area population.

Regardless of their position, staff should each possess the following qualifications:

- A bachelor's degree in communications, public relations, journalism, urban planning (with coursework in public participation), government, psychology, or a related field.
- Experience working in constituent services, communications, community relations, or public relations roles for all non-entry level positions. A typical Office of External Relations Public Outreach branch staff member may have a background providing constituent services for an



elected official, working in public or community relations at a private firm, or focusing on providing public involvement services at a public sector position or for public sector clients.

- Have strong interpersonal skills and the demonstrated ability to effectively facilitate the involvement of individuals from a variety of backgrounds.
- Be detail-oriented, well-organized, and have the ability to manage multiple responsibilities/projects at once.
- Have the ability to work well with technical project managers and understand how to convey technical content to a general audience, using techniques that ensure it is accessible to all regardless of level of education, literacy, and the ability to speak English.
- Possess the ability to speak one of the top eight languages other than English that are spoken in WMATA's service area (Spanish, Mandarin Chinese, Korean, Vietnamese, African Languages (Amharic, Twi), French, Persian/Farsi, and Tagalog); this skill is strongly preferred.
- Formal public participation training, such as academic coursework or a professional certification, such as the International Association of Public Participations' Certificate in Public Participation or Intercultural Communication, would be preferred.

### *Departmental Role in Public Participation – FY2016 and Beyond*

With the establishment of the Public Outreach branch, the role of other WMATA departments in public participation will change, but all departments in WMATA currently engaged with public participation will continue to be involved in these activities and be responsible for public participation outcomes.

All departments that participate in public participation activities at WMATA will have the following responsibility in regard to public participation going forward:

- *Accountability:* The culture of public participation at WMATA will be strengthened by the inclusion of public participation performance metrics in departmental business plans.
- *Process Partners:* Each department project manager will be responsible for understanding how the Public Communications and Outreach Plan process works and for providing their information to the EREL Public Outreach branch in a timely fashion to ensure that there is adequate time for planning and implementing meaningful public participation. Project managers will remain engaged partners in the public participation planning process providing input and feedback as requested. Project staff will participate in public outreach activities, providing project information and working directly with the public.
- *Incorporating Input:* Every department will have the responsibility for thoughtfully incorporating the results of the public participation process into their project or activity.

Several departments will remain more closely engaged with the EREL Public Outreach branch for specific purposes. The Office of Equal Employment Opportunity will retain management of the CBO relationships and the CBO Outreach Committee. OEEO works with these organizations today to ensure that WMATA's overall Title VI obligations are met and to provide access to information about employment opportunities at WMATA to these organizations' constituents. The Office of Planning will also work more closely with the Office of External Relations in the design and implementation of their public participation activities.



## Chapter 5 – Public Participation Toolkit

Chapter 5 provides an introduction to the Washington Metropolitan Area Transit Authority (WMATA) Public Participation Toolkit, which includes event guidelines and reporting forms, as well as the centerpiece of the toolkit, the Project Communications and Outreach Plan (PCOP).

The first section of Chapter 5 most closely represents how the PCOP will function and what it will look like as accessed through WMATA's intranet for use as a web-based tool, and includes all of the content and background information as reference material that users will need to complete the plan. The PCOP is divided into two pieces, *a four section project overview to be provided by the WMATA project manager, and the complete PCOP which will be completed by the Office of External Relations.*

The final two sections of Chapter 5 provide remaining toolkit documents specifically for the Office of External Relations that can be referenced throughout the PCOP process. These include the detailed event guidelines and the event supply checklist, as well as individual event plan and post-event summary forms.

*Please note that this Public Participation Toolkit is a living document and is subject to periodic updates and modifications as it is formatted for use and as additional information becomes available. It will also continue to be refined based on feedback and performance measures.*



## Introduction and Homepage Text

### *Federal Requirements*

As a recipient of federal funding, WMATA is required to create an authority-wide Public Participation Plan that ensures low-income, minority and limited English proficient (LEP) groups have full, fair, and meaningful access to public transportation decision-making opportunities.<sup>21</sup> As part of this plan, WMATA has created a web tool for project managers to simplify and standardize any project-based, public-participation planning and public outreach. This tool will be used by all departments within the agency that conduct public outreach and will be updated at least once a year based on feedback from project managers and other WMATA staff.

### *Process*

This web tool is intended to simplify and standardize public participation planning processes across all WMATA departments. After completing a few basic forms on this tool, project managers will just need to hit “send” to send project information to the Office of External Relations, which will help the project manager coordinate public participation logistics, including event venues, media relations, and printed materials. The tool will also ensure that outreach participants see the results of their public input. For each project, project managers should allocate 20-30 minutes to read and fill out their section of this tool. If available, project managers should have the following information on hand before starting this form:

- **Project Scope/Overall Project Timeline:** Approximate project start date and end date, and anticipated timeframes for public participation.
- **Project Demographics:** Overall population that will be impacted by the project and what percent are minority, low-income, and LEP. If this information is not available, there will be instructions for acquiring it.
- **Budget: Percent of overall budget** and dollar amount allocated for public communications and outreach. If a budget hasn’t been allocated yet, just type “N/A” and the Office of External Relations will work with you to develop a budget based on this form.

To complete the tool, the project manager will fill out four brief sections. Short, specific instructions are at the top of each form. If, at any point, project managers have questions, they will be directed to a contact in EREL’s Public Outreach branch.

### *Staff roles and responsibilities for the PCOP*

- **Project Managers:** The Project Manager will be the main point of contact, working with the Office of External Relations on public participation planning.
- **Office of External Relations:** The Office of External Relations will help the project manager coordinate public participation logistics, including event venues, media relations, printed materials, and making sure that customers see the results of their public input.

<sup>21</sup> FTA C 4702.1B



- **Consultants:** After submitting the form to the Office of External Relations, Project Managers, working with the Office of External Relations, will determine the most appropriate use of consultants for this project.
- **Other WMATA departments:** The Office of External Relations will serve as a liaison between the project manager and other WMATA departments that may be involved in public participation planning, such as Customer Research, Media Relations, Marketing, and the Board Secretary's Office.

### *Budget*

If a budget for public participation has already been determined, the project manager will enter it into a form in Section 4: Timeline and Budget. If not, the Project Manager will work with the Office of External Relations to determine the amount that should be allocated.

### *Project Manager Tool Sections*

1. Setting Up Your PCOP: Project Information, Staff Roles and Responsibilities.
2. Identify Your Project Population.
3. Identify Your Project Type and Role of Communications and Public Input.
4. Planning Your PCOP Timeline and Budget.



## Project Communications and Outreach Plan - *Project Manager Tool*

### *Section 1: Setting Up Your PCOP: Project Information*

In order to begin the Project Communications & Outreach Plan (PCOP) process, the Office of External Relations needs the following information:

- 1. Project Name:** [Click here to enter text.](#)
- 2. Project Description:** [Click here to enter text.](#)
- 3. Lead Project Department & Project Manager(s):** [Click here to enter text.](#)
- 4. Project Timeline (Month/Year to Month/Year):** [Click here to enter text.](#)



## Section 2: Identify Your Project Population

In order to create a successful PCOP, the Lead Project Manager(s) must determine the project demographics. This section will help project managers identify minority, low-income, and LEP populations who will be affected by the project.

### Step 1: Gather Your Data

First, determine your data sources using the “[Data Sources by Project Type](#)” table.

The WMATA service area is home to a very large and diverse immigrant population, and the language assistance resources that are needed will vary greatly by area. For projects that are not “systemwide” in nature but focused on a specific geographic area use the [MetroView](#) application to determine the languages in the study area for which language assistance resources should be provided. For systemwide projects, review the languages identified in “WMATA system demographics” table found in the Reference Material section and fill in this section with the words “systemwide.”

**Project Geography** (For projects focusing on a specific geographic area only, use [Metroview](#) to make two maps of the project area and upload them here as PDFs. On the first, show the “LEP Spanish” layer. On the second, show the other “LEP languages.”)

### Step 2: Summarize Your Data

For the three minority groups and low-income status, report if the population in the study area is higher than the system average. Spanish or another LEP group may be selected as a key demographic group in areas with high concentrations of these populations (as shown on the MetroView maps). For systemwide projects, fill in the project area values with “N/A, systemwide.”

**Project Population** (Please fill in)

Demographic Groups	% in Project Area	% Systemwide	Greater than System Average?
<b>Minority</b>	Click here to enter text. %		<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Black /African American</b>	Click here to enter text. %		<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Hispanic</b>	Click here to enter text. %		<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Asian or Pacific Islander</b>	Click here to enter text. %		<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Low-Income</b>	Click here to enter text. %		<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Top 5 LEP Languages</b>	Click here to enter text.		



Demographic Groups	% in Project Area	% Systemwide	Greater than System Average?

### Section 3: Identify Your Project Type and Role of Communications and Public Input

In order to successfully plan for public input and receive support through the PCOP, you must clarify the purpose of the project, the role of public input, and the project type. In this section, you will complete Steps 1-2.

#### Step 1: Determine the Purpose of Your Overall Plan

Please check the boxes that indicate your project type (select all that apply). Refer to the “[Project Type](#)” table in the reference section for more information.

#### Project Type (Please fill in, and select all that apply)

Project Type
<input type="checkbox"/> Planning Project
<input type="checkbox"/> Amenities and Infrastructure
<input type="checkbox"/> Environmental Analyses
<input type="checkbox"/> Service Changes
<input type="checkbox"/> Public Information Campaign
<input type="checkbox"/> Policy Alternatives
<input type="checkbox"/> Other: <i>[please describe]</i> <a href="#">Click here to enter text.</a>

#### Step 2: Determine why public input is being sought for this project

Please check the boxes that indicate the role of public input in your projects (select all that apply). Refer to the “[Role of Public Input](#)” table in the reference section for more information.

#### Role of Public Input (Please select all that apply)

Public Role
<input type="checkbox"/> INFORM
<input type="checkbox"/> CONSULT
<input type="checkbox"/> COLLABORATE
<input type="checkbox"/> Other: Please describe role of the public in your project, and how it is different from the other categories.

Describe briefly the reasoning for your selection and what type of input you hope to receive from the public on this project:



### Section 4: Timeline and Budget

In order for the Office of External Relations to begin creating a communication and outreach plan, project managers need to communicate the timeline of public outreach activities within the overall project scope of work. Project managers must also communicate and if (and how) public input will be used to inform project decisions.

#### Step 1: PCOP Timeline

Please fill in all of the major tasks of the project, indicating the month/year during which the task will likely take place and whether the task includes public communications or outreach. If the task does include public communications or outreach, indicate the Role of Public Input. Note that project timelines do change, and types of public outreach may take time; this will only be used for the original development of the PCOP and is subject to change.

Task #	Task 1	Task 2	Task 3	Task 4	Task 5
Month/Year	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Task	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Does the task include public outreach?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
(If Yes to Public Outreach) Role of Public Input	<input type="checkbox"/> Inform <input type="checkbox"/> Consult <input type="checkbox"/> Collaborate	<input type="checkbox"/> Inform <input type="checkbox"/> Consult <input type="checkbox"/> Collaborate	<input type="checkbox"/> Inform <input type="checkbox"/> Consult <input type="checkbox"/> Collaborate	<input type="checkbox"/> Inform <input type="checkbox"/> Consult <input type="checkbox"/> Collaborate	<input type="checkbox"/> Inform <input type="checkbox"/> Consult <input type="checkbox"/> Collaborate
Notes/Comments					

#### Step 2: Budget

Budget (Please complete)

Budget	Amount
% of Total project budget allocated for public communications & outreach	% Click here to enter text.
Project budget allocated for public communications & outreach (if outreach budget is not yet allocated, type "N/A")	\$ Click here to enter text.

If you are done, click "Send." If not, click "Save" and come back to this site later. Your changes will be saved.



## Project Manager Reference Material

### Section 2: Identify Your Project Population

#### Step 1: Gather Your Data

For projects involving the entire system or capital projects focusing on neighborhood impacts, refer to [Systemwide Demographics Data](#). For projects involving a subgroup of Metrorail or Metrobus riders, go to **Metrobus and Metrorail Passenger Survey Data**.

**Data Sources by Project Type**

Project Type	Description	Data Source
<b>Systemwide Projects</b>	For projects that involve the entire WMATA system. <i>Examples: Budget, major service changes, systemwide plans.</i>	<ul style="list-style-type: none"> <li>Systemwide Demographics Table</li> </ul>
<b>Metrobus or Metrorail Projects</b>	For projects that only involve specific bus lines or a specific rail stations. <i>Examples: Bus line studies, weekend rail shutdowns.</i>	<ul style="list-style-type: none"> <li>Metrobus and Metrorail Passenger Surveys (ethnic origin and income status)</li> <li>Metroview (language info)</li> </ul>
<b>Surrounding Neighborhood Projects</b>	For projects focused more on impacts to the surrounding neighborhood population (and not WMATA customers specifically) <i>Example: alternatives analysis of where to place a new bus garage.</i>	<ul style="list-style-type: none"> <li>Existing Conditions report</li> <li>Metroview (minority and income status)</li> </ul>

**WMATA Systemwide Demographics**

	Metrorail	Metrobus	MetroAccess	WMATA System Ridership
<b>Percent Minority</b>	43%	76%	69%	56%
<b>Percent Low-Income</b>	11%	43%	51%	24%
<b>Percent Limited English Proficient</b>	5%	24%	5%	12%
<b>Top LEP Languages for System: Spanish, Mandarin Chinese, Korean, Vietnamese, African Languages</b>				



## Section 3: Identify Your Project Type and Role of Communications and Public Input

## Step 1: Determine the Purpose of Your Overall Plan

Project Types	
Project Type	Example
<input type="checkbox"/> <b>Planning Project</b>	Long-range strategic planning (like Momentum) and station area planning projects, short-term planning (like bus studies).
<input type="checkbox"/> <b>Amenities and Infrastructure</b>	Obtaining rider feedback on fare gates, fare media types, etc.
<input type="checkbox"/> <b>Environmental Analyses</b>	The environmental justice impact of a new bus maintenance facility.
<input type="checkbox"/> <b>Service Changes</b>	Changing the route or frequency of a Metrobus or Metrorail line.
<input type="checkbox"/> <b>Public Information Campaign</b>	Temporarily shutting down a Metrorail station or line, detouring a Metrobus route, station entrance closure.
<input type="checkbox"/> <b>Policy Alternatives</b>	Budget and fare changes.

## Step 2: Determine why public input is being sought for this project

Role of Public Input	
Public Role	Definition
<input type="checkbox"/> <b>INFORM</b>	WMATA will provide facts and context for consideration to assist the public in understanding the policy, problem, alternatives, opportunities, and/or solutions. <b><i>Inform should only be used to convey information that has already been through an inclusive public participation process, emergency communications, or scheduled shutdowns. Other uses of strategies that serve only to inform must be approved by the Office of External Relations.</i></b>
<input type="checkbox"/> <b>CONSULT</b>	WMATA will obtain public feedback on analysis, alternatives, and/or decisions that have been developed by project staff.
<input type="checkbox"/> <b>COLLABORATE</b>	WMATA will work directly on analysis, alternatives, and/or decision-making with the public, including development of alternatives and identification of preferred solutions.
<input type="checkbox"/> <b>Other</b>	Please describe role of the public in your project, and how it is different from the other categories. <a href="#">Click here to enter text.</a>



## Project Communications and Outreach Plan – for use by the Office of External Relations only

The Office of External Relations will work with a project's manager after s/he has filled out the sections under the Project Communications and Outreach Plan – Project Manager Tool. Using the information provided, the Office of External Relations will, with input and final approval of the project manager, complete the Office of External Relations section of the PCOP and finalize the complete plan. The PCOP - Office of External Relations Tool includes three sections that must be completed and a subsection that contains detailed event guidelines.



## Section 1: Identify Event Types and Demographic Preferences

1. Verify “Role of Public Input” and “Demographic Groups” as identified by the project managers. If the Project Manager checked “Inform” in the Role of Public Input table, review the project for opportunities to Consult or Collaborate.
2. In **Table A: Event Types**, list the recommended outreach events based on the role of public input, then list the recommended outreach events based on project demographics in each phase of the project. If no event type is “recommended” for both the role of public input and demographic group, consider using the “performance varied” category for the demographic group shown in **Matrix 2: Event Type Preferences**.
3. Identify event types that correspond to both the role of public input and the project demographic groups.

Note, as shown in the notes on [Matrix 1: Outreach Events](#), certain types of projects will require public hearings as well.

Table A: Event Types

Task	Role of Public Input	Project Demographic Groups	Recommended Outreach Event Types based on Role of Public Input <i>Source: Matrix 1: Outreach Events</i>	Recommended Outreach Event Types based on Project Demographics <i>Source: Matrix 2: Event Type Preferences</i>	FINAL Recommendation of Outreach Event Types
Task	<input type="checkbox"/> Inform				
	<input type="checkbox"/> Consult				
	<input type="checkbox"/> Collaborate				
	<input type="checkbox"/> In addition to other outreach, this project requires a public hearing				
Task	<input type="checkbox"/> Inform				
	<input type="checkbox"/> Consult				
	<input type="checkbox"/> Collaborate				
	<input type="checkbox"/> In addition to other outreach, this project requires a public hearing				

### Feedback Type and Meeting Preference

The purpose of this section is to choose feedback types and meeting preferences that are appropriate for the project demographics.

1. Refer to Matrix 3, [Feedback Type Preferences](#), to determine feedback preferences of project demographics, as well as preferred languages.
2. Refer to Matrix 4, [Meeting Preference](#), to determine meeting preferences of the project demographics.
3. Based on feedback types, meeting preferences and preferred languages indicate whether interpreters or translators may be needed at an event.

**Table A: Feedback Type and Meeting Preference**

Event Type	Project Demographic	Project Demographic Preferred Feedback Type(s)	Project Demographic Meeting Preferences	Project Demographic Preferred Languages	Interpreters or Translations Needed?

## Section 2: Identify Event Locations, Objectives and Materials

### Event Scheduling

The purpose of this section is to determine the location and venues best suited to reaching project demographics.

1. Review [Location Selection and ADA Guidelines](#), and then fill out **Table A: Locations and Scheduling** below. Use the project location map identified in the project manager section to fill out the Neighborhood column.
2. If any events require reserving a venue space, review [Event Venue Guidelines](#) to help identify appropriate venue types.

**Table A: Locations and Scheduling**

Event Type	Neighborhood (include City and State)	Approximate Date	Event Location Type (i.e., church, Metrorail station)	Specific Venue Option(s)	Distance to transit (circle one)	Closest Metrobus route and Metrorail Station	ADA Accessible?*
					≤ 0.25 mi, ≤ 0.5 mi, ≤1 mi, >1 mi		
					≤ 0.25 mi, ≤ 0.5 mi, ≤1 mi, >1 mi		
					≤ 0.25 mi, ≤ 0.5 mi, ≤1 mi, >1 mi		
					≤ 0.25 mi, ≤ 0.5 mi, ≤1 mi, >1 mi		
					≤ 0.25 mi, ≤ 0.5 mi, ≤1 mi, >1 mi		
					≤ 0.25 mi, ≤ 0.5 mi, ≤1 mi, >1 mi		
					≤ 0.25 mi, ≤ 0.5 mi, ≤1 mi, >1 mi		
					≤ 0.25 mi, ≤ 0.5 mi, ≤1 mi, >1 mi		

\* Check ADA Guidelines and consult with the Office of ADA Policy and Planning for more details.



## Event Objectives and Content

*The purpose of this section is to clarify the objectives for each event, the number of people expected to attend, and the content to be developed for each event.*

Review the [Attendance and Event Types](#) table before filling in the “expected attendance” column in Table A. In many cases, such as a pop-up at a rail station or busy bus transfer point, the project team should expect much higher levels of participation. The numbers provided are meant only for reference and not as a specific guideline.

Fill out **Table A: Event Objectives and Materials**. Refer back to the Project Manager forms to help fill out the “Use of Event Feedback in Project” column. Use the [Event Guidelines](#) to fill out the “Event Content to be Developed” column.

**Table A: Event Objectives and Materials**

Event Type	Expected Attendance	Event Objectives	Event Feedback Type	Use of Event Feedback in Project	Languages for Event Materials	Event Content to be Developed

## Marketing and Communication

*The purpose of this section is to review the elements of the project’s marketing and communications plan that will be developed by Marketing and Media Relations.*

### Elements of Marketing and Communication Plan

- Review [Marketing and Communications Guidelines](#) and the [Media Strategies Matrix](#) to identify appropriate marketing strategies for event types identified in your outreach strategy and for your target demographics.
- If suggested outreach includes Community Based Organizations, be sure to include this in the Marketing and Communications plan and coordinate with EEO outreach coordinator.
- Incorporate marketing and communications needs for each event.
- Plan for follow-up to project outreach participants once project is implemented.

## Event Schedule and Staff Needs

*The purpose of this section is to determine the number and staff and consultants needed for each event.*

First: Complete **Table A: Event Schedule and Staff Needs** below for events that you have planned, and update this table as events are confirmed. Indicate which type of staff or consultants, aside from the event manager, will need to be present at the event. Use the [Event Guidelines](#) and, if conducting pop-ups, the [Pop-Up Staffing Guidelines](#) to support your decisions.



**Table A: Event Schedule and Staff Needs**

*The following sections will autofill based on information entered in Event Scheduling and Planning*

Event Type	Date and Time Booked (incl. Setup/Breakdown)	WMATA Topic Specialists	Facilitator	Interpreters	Street Team	Other Staff	Total Event Staff and Consultants

*Note: A more detailed version of this event schedule should be completed with names of WMATA staff and specific interpretation/street team staffing companies, using a sign-up system that is saved and archived. For an example of this type of system, see [SignUpGenius.com](http://SignUpGenius.com).*



### Section 3: Create Project Timelines, Tasks, and Budget

#### Project Outreach Timeline

*The purpose of this section is to create a task list for ALL public outreach events in ALL phases of a project plan.*

Fill in **Table A: Project Outreach Timeline** with a detailed task list, and indicate the number of weeks each task will take, based on the information filled out in Section 2.

For more specific information for each event type (including time for development and approval of materials, printing, reserving venues, etc.), review the [Event Guidelines](#) for your event. Use the “Order of Operations” section of the [Event Guidelines](#) to create the task list. If your planning process has multiple phases, show the periods of time for which event planning, events, and closeout will occur for each phase.

The timeline shown in this form (Table B) is a simplified example of a possible format.



Table A: Project Outreach Timeline Example

		Tasks	Task Lead	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20	Week 21	Week 22
Event Planning																									
Event																									
Closeout																									
	Follow-up with event participants (required)																								

## Cost

Use the [Event Guidelines](#) to determine which budget items are required for your event(s); fill in the costs below.

If the event has a pre-determined Public Outreach budget, enter it here: [Click here to enter text.](#)

**Table A: Costs (excluding pre-planning and closeout costs)**

Expense Categories	Description	Dollar Amount	Notes
Location/Venue fee(s)		\$	
		\$	
<b>Event materials</b> <ul style="list-style-type: none"> <li>• Meetings/Workshops: maps, renderings, etc.</li> <li>• Pop-ups: printing banners, giveaways, campaign t-shirts/smocks, etc.</li> </ul>		\$	
		\$	
		\$	
		\$	
Translation fee for printed event materials		\$	
<b>Communications and Promotion content and print media, including design and print costs</b> <ul style="list-style-type: none"> <li>• Website, emails to CBOs, etc. postcards, bus cards, flyers, etc.</li> </ul>		\$	
Translation fee for marketing and communication content		\$	
<b>External Staffing / Consultants</b> <ul style="list-style-type: none"> <li>• Facilitator(s), consultants, street team, interpreter(s)</li> </ul>		\$	
Advertising Fees		\$	
Transportation (to and from event)		\$	
Snacks/Water		\$	
Other, <i>please list:</i>		\$	
<b>TOTAL</b>		\$	



Office of External Relations Tool Reference Material

Attendance and Event Types		
Event	Attendance Range <sup>22</sup>	Description
Focus Group or Small Group Discussion	7-15	Focus groups should have enough participants to provide a diverse set of viewpoints but still be small enough that the conversation feels accessible to all participants.
Community Meeting	50 or more	Community meeting formats include workshops, charrettes, and open houses. The number of participants can vary widely.  Community meetings should have enough participants to enable several events to happen at the same time; i.e., break-out groups among different tables or multiple workstations for an open house.
CBO Meeting	7 or more	CBO meetings are generally held with clients and/or staff of CBOs and can be structured as focus groups or open format events held on site at the CBO. Groups of 7 to 16 should follow focus group attendance measures, and larger events should reflect community meeting attendance measures.
Pop-Up	100 or more	Pop-up events provide outreach staff with access to large numbers of people over an extended period of time. A pop-up event should, due to its location and limited participant time commitment, have far more participants than a focus group or community meeting.
Online Outreach	100 or more	Like a pop-up event, online outreach should have far more participants than a focus group or community meeting.
Public Hearing	10 or more	Public hearings are required by the WMATA Compact under certain prescribed project types – but it is recommended that WMATA conduct other types of outreach in addition to the public hearing to ensure meaningful, broad-based participation from a greater number of persons. In WMATA’s experience, public hearings typically generate limited turnout, particularly among those who are traditionally disadvantaged in the transit decision-making process.

<sup>22</sup> The attendance range does not include WMATA staff or contractors.

Matrix 1: Outreach Events

	Inform	Consult	Collaborate
Strongly Recommended	<ul style="list-style-type: none"><li>• Pop-ups<sup>23</sup></li><li>• CBO Engagement</li><li>• Online Outreach</li><li>• Public Information Campaigns</li></ul>	<ul style="list-style-type: none"><li>• Pop-ups</li><li>• Community Meetings/Open Houses</li><li>• Focus Groups</li><li>• Online</li><li>• Public Hearings*</li></ul>	<ul style="list-style-type: none"><li>• CBO Engagement</li><li>• Focus Groups</li><li>• Community Meetings/Open Houses</li></ul>
Recommended		<ul style="list-style-type: none"><li>• CBO Engagement</li></ul>	<ul style="list-style-type: none"><li>• Community Meetings</li><li>• Online</li><li>• Online</li></ul>
Not Preferred	<ul style="list-style-type: none"><li>• Community Meetings/Open Houses</li></ul>		
Not Recommended	<ul style="list-style-type: none"><li>• Focus Groups</li><li>• Public Hearings*</li></ul>		<ul style="list-style-type: none"><li>• Pop-ups</li><li>• Public Hearings*</li><li>• </li></ul>

**\*Note: Public Hearings are required by the WMATA Compact under the following scenarios:**

- Fare Increase
- Major Service Reduction
- Capital improvements governed under NEPA
- Before the adoption of a new mass transit plan
- At the written request of any signatory, any political subdivision thereof, any agency of the federal government, and any person, firm or association served by or using WMATA service with respect to any rates or charges or any service rendered with the facilities owned or controlled by WMATA.

In all other instances, public hearings are **not recommended** for use as an outreach strategy. Also, while these scenarios require public hearings, it **is recommended** that additional outreach as outlined in the PPP be conducted, depending on the project type and the role of public input in the project.

<sup>23</sup> Bus planning rider surveys should be classified as “Pop-ups.”

Matrix 2: Event Type Preferences

	Age Groups			Minority Groups		
	Low income	Young Adults (Under 25)	Senior Citizens (Over 65)	Black/African American	Hispanic	Asian or Pacific Islander
<b>Recommended</b>	<ul style="list-style-type: none"><li>• Pop-ups</li></ul>	<ul style="list-style-type: none"><li>• Online</li></ul>	<ul style="list-style-type: none"><li>• CBO Meeting</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Transit</li><li>• Community Meeting</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Metrobus stops</li></ul>	
<b>Preference Varied</b>	<ul style="list-style-type: none"><li>• CBO Meeting</li></ul>	<ul style="list-style-type: none"><li>• Pop-ups</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Transit and Shopping</li><li>• Community Meeting</li><li>• Public Hearing</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Festival and Shopping</li><li>• CBO Meeting</li><li>• Online</li></ul>	<ul style="list-style-type: none"><li>• Pop-ups@ Festival, Metrorail, Shopping</li><li>• CBO Meeting</li><li>• Community Meeting</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Festivals and Transit</li><li>• CBO Meetings</li></ul>
	<ul style="list-style-type: none"><li>• Community Meeting</li><li>• Focus Group</li><li>• Online</li><li>• Public Hearing</li></ul>	<ul style="list-style-type: none"><li>• CBO Meetings</li></ul>	<ul style="list-style-type: none"><li>• Pop-up @Festival</li></ul>	<ul style="list-style-type: none"><li>• Public Hearing</li></ul>	<ul style="list-style-type: none"><li>• Online</li><li>• Public Hearing</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Shopping</li><li>• Community Meetings</li><li>• Online</li><li>• Public Hearing</li></ul>
<b>Not Recommended</b>			<ul style="list-style-type: none"><li>• Online</li></ul>			

Limited English Proficiency						
	Spanish-speaking	Chinese-speaking	Vietnamese-speaking	Korean-speaking	Amharic-speaking	Arabic-speaking
<b>Recommended</b>						
<b>Preference Varied</b>	<ul style="list-style-type: none"><li>• Pop-up</li><li>• CBO Meeting</li></ul>	<ul style="list-style-type: none"><li>• Pop-up</li><li>• CBO Meeting</li></ul>	<ul style="list-style-type: none"><li>• CBO Meeting</li><li>• Online</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Metrorail</li><li>• CBO Meeting</li><li>• Focus Groups</li></ul>	<ul style="list-style-type: none"><li>• Pop-ups@ Metrobus stops</li></ul>	<ul style="list-style-type: none"><li>• CBO Meetings</li><li>• Online</li></ul>
<b>Suggested, but not verified</b>	<ul style="list-style-type: none"><li>• Community Meeting</li><li>• Online</li><li>• Public Hearing</li></ul>	<ul style="list-style-type: none"><li>• Community Meeting</li><li>• Focus Group</li><li>• Online</li><li>• Public Hearing</li></ul>		<ul style="list-style-type: none"><li>• Pop-up@ Shopping</li></ul>	<ul style="list-style-type: none"><li>• Focus Group</li><li>• Online</li><li>• Public Hearing</li></ul>	
<b>Not Recommended</b>	<ul style="list-style-type: none"><li>• Pop-up</li><li>• Community Meeting</li><li>• Focus Group</li><li>• Public Hearing</li></ul>					

	Homeless	Persons with Disabilities	Deaf/Hard of Hearing (Under 25)
<b>Recommended</b>	<ul style="list-style-type: none"><li>• CBO Meeting</li></ul>	<ul style="list-style-type: none"><li>• CBO Meeting</li></ul>	
<b>Preference Varied</b>	<ul style="list-style-type: none"><li>• Community Meetings</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Festivals</li><li>• Focus Group</li></ul>	<ul style="list-style-type: none"><li>• Pop-up@ Festivals and Transit</li><li>• CBO Meeting</li></ul>
<b>Suggested, but not verified</b>			<ul style="list-style-type: none"><li>• Focus Group</li><li>• Online</li></ul>
<b>Not Recommended</b>	<ul style="list-style-type: none"><li>• Pop-up</li><li>• Focus Group</li><li>• Online</li><li>• Public Hearing</li></ul>		

Matrix 3: Feedback Type Preferences

	Age Groups			Minority Groups		
	Low income	Young Adults (Under 25)	Senior Citizens (Over 65)	Black/African American	Hispanic	Asian or Pacific Islander
Recommended		<ul style="list-style-type: none"><li>Survey</li></ul>	<ul style="list-style-type: none"><li>One-on-one</li></ul>			
Preference Varied	<ul style="list-style-type: none"><li>Survey</li></ul>		<ul style="list-style-type: none"><li>Small Group Discussion</li><li>Open Discussion/ Workshop</li></ul>	<ul style="list-style-type: none"><li>Survey</li><li>Open Discussion/ Workshop</li></ul>	<ul style="list-style-type: none"><li>Survey</li><li>Small Group Discussion</li></ul>	<ul style="list-style-type: none"><li>Survey</li><li>Open Discussion/ Workshop</li><li>One-on-one</li></ul>
Suggested, but not verified	<ul style="list-style-type: none"><li>Comment Card</li><li>Public Hearings*</li><li>Small Group Discussion</li><li>Open Discussion/ Workshop</li><li>Electronic Voting</li></ul>	<ul style="list-style-type: none"><li>Small Group Discussion</li><li>Open Discussion/ Workshop</li><li>Electronic Voting</li></ul>	<ul style="list-style-type: none"><li>Survey</li><li>Comment Card</li><li>Public Hearing*</li></ul>	<ul style="list-style-type: none"><li>Comment Card</li><li>Public Hearings*</li><li>Small Group Discussion</li><li>Electronic Voting</li></ul>	<ul style="list-style-type: none"><li>Public Hearings*</li><li>Open Discussion/ Workshop</li><li>Electronic Voting</li></ul>	<ul style="list-style-type: none"><li>Comment Card</li><li>Public Hearings*</li><li>Small Group Discussion</li><li>Electronic Voting</li></ul>
Not Recommended		<ul style="list-style-type: none"><li>Comment Card</li></ul>	<ul style="list-style-type: none"><li>Electronic Voting</li></ul>			

Limited English Proficiency						
	Spanish-speaking	Chinese-speaking	Vietnamese-speaking	Korean-speaking	Amharic-speaking	Arabic-speaking
Recommended	<ul style="list-style-type: none"><li>Comment Cards</li></ul>					
Preference Varied	<ul style="list-style-type: none"><li>Survey</li><li>Small Group Discussion</li><li>Open Discussion/ Workshop</li></ul>	<ul style="list-style-type: none"><li>Survey</li><li>Open Discussion/ Workshop</li><li>One-on-One</li></ul>	<ul style="list-style-type: none"><li>Speak one-on-one with WMATA staff</li><li>Electronic Voting</li></ul>	<ul style="list-style-type: none"><li>Survey</li><li>Small Group Discussion</li><li>Electronic Voting</li></ul>	<ul style="list-style-type: none"><li>Survey</li><li>Comment Card</li><li>One-on-One</li></ul>	<ul style="list-style-type: none"><li>Small Group Discussion</li><li>Open Discussion/ Workshop</li></ul>
Suggested, but not verified	<ul style="list-style-type: none"><li>Comment Card</li><li>Public Hearings*</li><li>Electronic Voting</li></ul>				<ul style="list-style-type: none"><li>Small Group Discussion</li><li>Open Discussion/ Workshop</li></ul>	
Not Recommended	<ul style="list-style-type: none"><li>Survey</li><li>Public Hearing</li><li>Small Group Discussion</li><li>Open Discussion/ Workshop</li></ul>					

	Homeless	Persons with Disabilities	Deaf/Hard of Hearing (Under 25)
<b>Recommended</b>			
	<ul style="list-style-type: none"><li>• Small Group Discussion</li><li>• Open Discussion/ Workshop</li></ul>	<ul style="list-style-type: none"><li>• Public Hearing*</li><li>• Small Group Discussion</li><li>• Open Discussion/ Workshop</li></ul>	<ul style="list-style-type: none"><li>• Survey</li><li>• Small Group Discussion</li><li>• Open Discussion/ Workshop</li><li>• One-on-one</li><li>• Electronic Voting</li></ul>
<b>Preference Varied</b>			
	<ul style="list-style-type: none"><li>• Survey</li><li>• Public Hearing</li><li>• Electronic Voting</li></ul>		<ul style="list-style-type: none"><li>• Comment Card</li></ul>
<b>Suggested, but not verified</b>			
<b>Not Recommended</b>			

Matrix 4: Meeting Preference Matrix

		Age Groups		Minority Groups		
		Young Adults (Under 25)	Senior Citizens (Over 65)	Black/African American	Hispanic	Asian or Pacific Islander
Recommended	Low income	<ul style="list-style-type: none"><li>Near public transit</li></ul>	<ul style="list-style-type: none"><li>Location near work or home</li><li>Near public transit</li><li>Speak one-on-one with WMATA staff</li></ul>	<ul style="list-style-type: none"><li>Location near work or home</li><li>Near public transit</li></ul>	<ul style="list-style-type: none"><li>Location near work or home</li><li>Near public transit</li><li>Speak one-on-one with WMATA staff</li><li>Provide food</li></ul>	<ul style="list-style-type: none"><li>Location near work or home</li><li>Near public transit</li></ul>
Preference Varied		<ul style="list-style-type: none"><li>Activities for children</li><li>Meetings of weeknights</li><li>Provide food</li></ul>	<ul style="list-style-type: none"><li>Meetings on weekends</li><li>Meetings on weeknights</li><li>Speak one-on-one with WMATA staff</li><li>Provide food</li></ul>	<ul style="list-style-type: none"><li>Meetings on weekends</li><li>Translators</li><li>Provide food</li></ul>	<ul style="list-style-type: none"><li>Meetings on weekends</li><li>Meetings on weeknights</li><li>Activities for children</li><li>Translators</li></ul>	<ul style="list-style-type: none"><li>Meetings on weekends</li><li>Meetings on weeknights</li><li>Activities for children</li><li>Translators</li><li>Speak one-on-one with WMATA staff</li><li>Provide food</li></ul>
Suggested, but not verified		<ul style="list-style-type: none"><li>Activities for children</li><li>Location near work or home</li></ul>	<ul style="list-style-type: none"><li>Meetings on weeknights</li><li>Activities for children</li></ul>			
Not Recommended						

Limited English Proficiency						
	Spanish-speaking	Chinese-speaking	Vietnamese-speaking	Korean-speaking	Amharic-speaking	Arabic-speaking
Recommended	<ul style="list-style-type: none"><li>Meetings on weekends</li><li>Translators</li></ul>	<ul style="list-style-type: none"><li>Location near work or home</li><li>Translators</li></ul>	<ul style="list-style-type: none"><li>Translators</li></ul>	<ul style="list-style-type: none"><li>Translators</li></ul>		
Preference Varied	<ul style="list-style-type: none"><li>Activities for children</li><li>Location near work or home</li><li>Meetings on weeknights</li><li>Near public transit</li><li>Provide food</li></ul>	<ul style="list-style-type: none"><li>Activities for children</li><li>Meetings on weekends</li><li>Meetings on weeknights</li><li>Near public transit</li><li>Speak one-on-one with WMATA staff</li><li>Provide food</li></ul>	<ul style="list-style-type: none"><li>Speak one-on-one with WMATA staff</li></ul>	<ul style="list-style-type: none"><li>Activities for children</li><li>Meetings on weekends</li></ul>		<ul style="list-style-type: none"><li>Speak one-on-one with WMATA staff</li><li>Translators</li></ul>
Suggested, but not verified	<ul style="list-style-type: none"><li>Speak one-on-one with WMATA staff</li></ul>				<ul style="list-style-type: none"><li>Near public transit</li><li>Speak one-on-one with WMATA staff</li><li>Translators</li></ul>	
Not Recommended						

	Homeless	Persons with Disabilities	Deaf/Hard of Hearing (Under 25)
<b>Recommended</b>	<ul style="list-style-type: none"><li>• Location near work or home</li><li>• Near public transit</li><li>• Speak one-on-one with WMATA staff</li></ul>		<ul style="list-style-type: none"><li>• Near public transit</li><li>• Translators</li></ul>
<b>Preference Varied</b>	<ul style="list-style-type: none"><li>• Meetings on weeknights</li></ul>	<ul style="list-style-type: none"><li>• Meetings on weeknights</li><li>• Meetings on weekends</li></ul>	<ul style="list-style-type: none"><li>• Meetings on weeknights</li><li>• Meetings on weekends</li><li>• Location near work or home</li><li>• Speak one-on-one with WMATA staff</li><li>• Provide food</li></ul>
<b>Suggested, but not verified</b>			<ul style="list-style-type: none"><li>• Activities for children</li></ul>
<b>Not Recommended</b>	<ul style="list-style-type: none"><li>• Meetings on weekends</li></ul>		

Matrix 5: Media Strategies Matrix

		Age Groups		Minority Groups		
		Young Adults (Under 25)	Senior Citizens (Over 65)	Black/African American	Hispanic	Asian or Pacific Islander
Low income	Recommended	<ul style="list-style-type: none"><li>• Flyers</li></ul>	<ul style="list-style-type: none"><li>• Social Media</li><li>• Online</li><li>• Text Message</li></ul>	<ul style="list-style-type: none"><li>• Newspaper</li><li>• Flyers</li><li>• CBO Announcement</li></ul>		<ul style="list-style-type: none"><li>• </li></ul>
	Preference Varied	<ul style="list-style-type: none"><li>• WMATA Website</li><li>• TV</li><li>• Newspaper</li><li>• Social Media</li><li>• Online</li></ul>	<ul style="list-style-type: none"><li>• WMATA Website</li><li>• Newspaper</li><li>• Flyers</li></ul>	<ul style="list-style-type: none"><li>• TV</li><li>• Newspaper</li><li>• Social Media</li><li>• Flyers</li><li>• Online</li><li>• CBO Announcement</li></ul>	<ul style="list-style-type: none"><li>• TV</li><li>• Newspaper</li><li>• Flyers</li><li>• Online</li><li>• CBO Announcement</li></ul>	<ul style="list-style-type: none"><li>• WMATA Website</li><li>• Newspaper</li><li>• Email</li><li>• Social Media</li><li>• Flyers</li><li>• Online</li><li>• CBO Announcement</li></ul>
Suggested, but not verified		<ul style="list-style-type: none"><li>• Radio</li><li>• CBO Announcements</li><li>• Public Schools</li><li>• Direct Mail</li><li>• Phone Calls</li></ul>	<ul style="list-style-type: none"><li>• TV</li><li>• Radio</li></ul>	<ul style="list-style-type: none"><li>• WMATA Website</li><li>• Radio</li><li>• Email</li><li>• Direct Mail</li><li>• Phone Calls</li></ul>	<ul style="list-style-type: none"><li>• WMATA website</li><li>• Radio</li><li>• Email</li><li>• Public Schools</li><li>• Direct Mail</li><li>• Phone Calls</li></ul>	<ul style="list-style-type: none"><li>• WMATA Website</li><li>• Radio</li><li>• Email</li><li>• Social Media</li><li>• Public Schools</li><li>• Direct Mail</li><li>• Phone Calls</li></ul>
	Not Recommended	<ul style="list-style-type: none"><li>• Email</li></ul>	<ul style="list-style-type: none"><li>• CBO Announcement</li><li>• Public Schools</li><li>• Direct Mail</li></ul>	<ul style="list-style-type: none"><li>• Social Media</li><li>• Public Schools</li></ul>		

Limited English Proficiency						
	Spanish-speaking	Chinese-speaking	Vietnamese-speaking	Korean-speaking	Amharic-speaking	Arabic-speaking
Recommended		<ul style="list-style-type: none"><li>Newspaper</li></ul>				
Preference Varied	<ul style="list-style-type: none"><li>TV</li><li>Newspaper</li><li>Flyers</li><li>Online</li><li>Text Message</li></ul>	<ul style="list-style-type: none"><li>TV</li><li>Email</li><li>Flyers</li><li>Online</li><li>CBO Announcement</li></ul>	<ul style="list-style-type: none"><li>TV</li><li>Radio</li><li>Newspaper</li><li>Social Media</li><li>CBO Announcement</li></ul>	<ul style="list-style-type: none"><li>TV</li><li>Radio</li><li>Newspaper</li><li>Social Media</li><li>Online</li><li>CBO Announcement</li><li>Public School</li><li>Direct mail</li></ul>	<ul style="list-style-type: none"><li>Flyers</li><li>CBO Announcement</li></ul>	<ul style="list-style-type: none"><li>CBO Announcement</li></ul>
Suggested, but not verified	<ul style="list-style-type: none"><li>WMATA Website</li><li>Radio</li><li>Social Media</li><li>CBO Announcement</li><li>Public School</li><li>Direct Mail</li><li>Phone Calls</li></ul>	<ul style="list-style-type: none"><li>WMATA Website</li><li>Radio</li><li>Social Media</li><li>Public Schools</li><li>Direct Mail</li><li>Phone Calls</li></ul>			<ul style="list-style-type: none"><li>Radio</li></ul>	<ul style="list-style-type: none"><li>Flyers</li><li>Online</li><li>Text Message</li></ul>
Not Recommended						<ul style="list-style-type: none"><li>WMATA Website</li><li>Social Media</li></ul>

	Homeless	Persons with Disabilities	Deaf/Hard of Hearing (Under 25)
<b>Recommended</b>	<ul style="list-style-type: none"><li>CBO Announcements</li></ul>		<ul style="list-style-type: none"><li>Online</li></ul>
	<ul style="list-style-type: none"><li>TV</li><li>Newspaper</li></ul>	<ul style="list-style-type: none"><li>WMATA Website</li><li>TV</li><li>Newspaper</li><li>Email</li><li>Social Media</li><li>Online</li><li>Flyers</li><li>CBO Announcement</li></ul>	<ul style="list-style-type: none"><li>WMATA Website</li><li>Newspaper</li><li>Email</li><li>Social Media</li><li>Flyers</li></ul>
<b>Preference Varied</b>			
<b>Suggested, but not verified</b>	<ul style="list-style-type: none"><li>Social Media</li></ul>		<ul style="list-style-type: none"><li>TV</li><li>CBO Announcement</li><li>Direct Mail</li></ul>
	<ul style="list-style-type: none"><li>Email</li><li>Online</li><li>Public Schools</li><li>Direct Mail</li><li>Phone Calls</li></ul>		<ul style="list-style-type: none"><li>Radio</li><li>Phone Calls</li></ul>
<b>Not Recommended</b>			

## Event Guidelines

The Project Communications and Outreach Plan's (PCOP) form and matrices are supported by a set of guidelines for event planning and management. The guidelines contained in this section cover the following topics, contain information that assists in the PCOP planning process, and helps project managers develop event plans.

- Location Selection
- Americans with Disabilities Act (ADA)
- Event Venue
- Marketing and Communications
- Pop-Up Staffing
- Survey Management
- Activity Design
- CBO Meeting
- Public Hearing
- Online Outreach
- Focus Group
- Pop-Up: Festival
- Pop-Up: Transit
- Pop-Up: Commercial and Residential
- Community Meeting/Workshop



### Location Selection Guidelines

Selecting the general location for a public participation activity is an important aspect of ensuring that the target audiences are reached. The WMATA service area is highly diverse, and each individual neighborhood has its own demographic, socio-economic, linguistic, and cultural characteristics. Target demographic groups can only be reached if public participation activities are held in locations where they reside or work. It is critical to understand the local area and population before planning for any public participation activity to ensure that the activities are structured and advertised appropriately. It is also necessary to make sure that the appropriate language assistance resources are provided. This is true even for large-scale, multi-event public participation activities that do not target any specific demographic group(s).

#### Location Selection Considerations

**Understand Local Area Demographics:** WMATA has an internal *MetroView* GIS application that provides information on the percent of minority and low-income persons present at differing levels of geography (Census blocks, block groups, and tracts) across the WMATA service area. The demographics of potential event locations should be captured during the event planning process.

**Examine LEP Population Concentrations:** The WMATA service area is home to a very large and diverse immigrant population, and the language assistance resources that are needed will vary greatly by area. Within the *MetroView* application, use the LEP layer to determine what language assistance resources will be needed. It is important to prioritize language assistance resources based on LEP populations, not populations whose native language is not English; these are very different groups.

**Strive to Match WMATA's Ridership Profile:** All large-scale, multi-event public participation activities should strive to ensure that participation reflects the characteristics of WMATA's ridership. Public participation plans with multiple activities across the service area should plan for event locations that will attract participation from minority, low-income, and limited English proficient populations in the same relative proportions as these populations comprise WMATA's ridership. Projects that are soliciting input from users of one mode, Metrorail, Metrobus, or MetroAccess, should use the profile of the mode's users as their benchmark for the participation of minority, low-income, and LEP populations.

#### WMATA's Ridership Profile

	Metrorail	Metrobus	MetroAccess	WMATA System Ridership
Percent Minority	43%	76%	69%	56%
Percent Low-Income	11%	43%	51%	24%
Percent Limited English Proficient	5%	24%	5%	12%



### *Americans with Disabilities Act (ADA) Guidelines*

The Americans with Disabilities Act (ADA), signed into law on July 26, 1990, prohibits discrimination against people with disabilities and guarantees that they have the same opportunities as everyone else to participate in the mainstream of American life: to enjoy employment opportunities, to purchase goods and services, and to participate in State and local government programs and services.

Accommodations, such as information in alternative formats, including thumb drives, audiotape, open or closed captioning, large print, or Braille, must be made by public agencies to ensure that persons with disabilities have access to government programs and services.

#### **Meeting ADA Requirements**

##### **Advertise the availability of accommodations early and on all communications materials.**

- Invite meeting/event participants to make requests for accommodation on all communication materials (e.g., flyers, meeting materials, presentations, etc.).
- Include a statement of compliance with ADA and the provision of accommodations on promotional materials, such as flyers and advertisements (both print and computer).
- Include photographs of individuals with disabilities in the promotional materials; this illustrates a commitment to assuring all participants an accessible event.
- Use simple, visual design with a clear font, such as Arial or Courier, and a contrasting paper color for flyers and other promotional materials to increase legibility for readers with low vision.

##### **Always provide space in event budgets for ADA accommodations.**

- If accommodations are requested, the event budget must be able to stretch enough to provide services such as a sign language interpreter, assistive listening devices, or amplification of the speaker or media in alternate formats (i.e. a copy of the PowerPoint presentation or handouts in large print or Braille).
- If accommodations are requested, additional staff might be required to assist persons with disabilities. Ensure that the event is staffed adequately and include staff that can operate as readers, guides, and do other functions related to accommodating individuals with disabilities.

##### **Consider ADA accessibility in event and meeting site selections.**

A site visit should be conducted to determine whether barriers to accessibility exist. The site visit should consider barriers to those with a wide range of impairments (visual, hearing, mobility, etc.) in all of the areas used, including:

- Accessibility/availability of parking and public transportation;
- Entrances and interior doorways – width, ramps, automatic door openers, etc.;
- Signage – location of accessible bathrooms, entrances, etc.;
- Corridors, doorways, and aisles – width for wheelchair access, etc.;
- Elevators – easy access and adequate numbers;
- Meeting rooms – allow for extra room capacity and table space to accommodate wheelchairs and assistance animals. Also allow space for a clear line of sight to the interpreter/captionist from an appropriate number of seats in the audience.



**Making all presentations and materials accessible**

The project manager/event planner should ensure that the meeting format is accessible to persons with disabilities.

- Presentation slides should be legible, with large print and sharp, contrasting colors.
- Adequate time should be included in presentations to allow the audience to read the visual aids.
- Provide a complete verbal description of purely visual materials, such as maps or graphs for persons that are seeing disabled.
- Check for the needs of presenters with disabilities (ramping or podium requests, a reverse interpreter, sighted guide for a person with limited vision, etc.).
- Provide all meeting materials in alternative formats, such as thumb drives, audiotapes, open or closed captioning, large print, or Braille, as needed.



### Event Venue Guidelines

The venue for a public participation activity has a great deal of influence on its success. Venue selection should take into account the accessibility of the location to the target population(s), venue related costs and their impact on the project's budget, and how the venue's amenities and set-up fit with the planned event type. A pop-up event that includes a public survey will work best in well-trafficked areas. A Metrorail Station would be ideal for reaching a large number of WMATA system users, while a well-utilized shopping center or community center would be effective for reaching the public at-large. Community meetings often require space for workshop activities and audio-visual equipment capabilities, but they must also be held in places that are accessible and familiar to target population groups.

#### Suggested Venues by Event Type

Event Type	School Auditoriums or cafeterias; libraries	Community Centers	Metrorail Stations and Metrobus Transfer Centers	Religious or community group	Festivals and other public events	Shopping centers	CBO or service provider offices
Pop-Ups		✓	✓		✓	✓	
CBO Engagement		✓		✓			✓
Community Meetings/ Workshops	✓	✓		✓			
Public Hearings	✓	✓		✓			
Focus Group				✓			✓
Online Outreach	n/a	n/a	n/a	n/a	n/a	n/a	n/a

#### Key Considerations for Venue Selection

- ☐ Is the venue accessible per the requirements of the Americans with Disabilities Act (ADA)?
- ☐ Is the venue easily accessible via transit and convenient for all?
- ☐ Is the venue familiar to the local community and target populations?
- ☐ Does the cost of the venue fit within the project budget?
- ☐ Does the venue have all of the amenities required (e.g., chairs, tables, projector screens, audio-visual support, electrical outlets, etc.) for the activity?
- ☐ If snacks will be provided at the activity, is food allowed at the venue?
- ☐ Will the event location be easy to find with proper wayfinding signage?



### Marketing and Communications Guidelines

Project and event marketing help a project manager efficiently allocate limited resources toward increasing public participation. This means increasing target population attendance or participation at events, meetings, and/or online forums to ensure that participants reflect the demographics impacted by the project.

#### Marketing Strategies by Event Type

Different event types benefit from different marketing and communications strategies; what works for promoting a community meeting/workshop might not work for a more targeted CBO engagement activity. Project managers should use the grid below, along with their professional judgment, to determine the most effective collection of strategies to increase target population participation in the outreach component of their project. For more detailed descriptions of each marketing strategy, see the “Marketing Strategy Descriptions” table below. Refer also to the “Media Strategies” matrix for more detailed information on media targeting by demographic.

Event Type	TV Ads	Radio Ads	Direct Mail	Online ads	General Interest Newspaper Ads	Newspapers Ads or Stories	Text Message	Earned Media	Social Media and WMATA Website	Flyers	Email	CBO Promotion	Public School Promotion
Pop-Ups		•		•		•			•				
CBO Engagement						•					•	•	
Community Meeting/Workshop	•	•	•	•	•	•	•	•	•	•	•	•	•
Public Hearings	•	•	•	•	•	•	•	•	•	•	•	•	•
Focus Groups											•	•	
Online			•	•	•	•	•	•	•	•	•	•	•



## Marketing Strategy Descriptions

Cost	Marketing Strategies	Time to Develop Materials	Notes
Paid	<i>TV Ads</i>	High	Very wide reach. Most useful for large, well-funded projects with wide-ranging geographies and target demographics.
	<i>Radio Ads</i>	Moderate	Local community radio or LEP-targeted stations cost less. Radio stations can also serve as effective promotional and staff partners for pop-ups.
	<i>Direct Mail/Email</i>	Moderate	Easy to target demographics; cost depends on the number of pieces / number of emails sent.
	<i>Online Advertising (websites, social media)</i>	Low	Easy to measure clicks on ads.
	<i>General Interest Newspaper Ads</i>	Moderate	Effective but must be simply worded, graphically-oriented, and in a highly-read section of the newspaper. Lead times are higher for weekly or monthly newspapers.
	<i>Specialty Newspaper Ads<sup>24</sup></i>	Moderate	Effective method to reach LEP communities in WMATA's service area. Lead times are higher for weekly or monthly newspapers.
	<i>Text Messages</i>	Low to Moderate	Effective method to reach younger populations and immigrant communities.
Free to Very Low Cost	<i>Flyers on Metrobus or at Metrorail locations</i>	Low to Moderate	Effective method to reach both riders of specific lines/routes and the overall WMATA ridership.
	<i>Earned Media (includes press releases)</i>	Low to Moderate	Use press releases and media pitches to get event preview stories in daily or weekly newspapers, radio stations, local TV news, and blogs.
	<i>Specialty Newspaper Stories</i>	Low to Moderate	Many weekly newspapers will run press releases and provided photos as content. Deadlines may be several weeks in advance for some smaller papers.
	<i>Social Media and WMATA website</i>	Low	Use to promote events, create excitement, or generate discussion.

<sup>24</sup> Specialty newspapers are targeted toward specific constituencies and/or language speakers and may not publish every day.

Cost	Marketing Strategies	Time to Develop Materials	Notes
	<i>Take-ones</i>	Moderate	Easily placed materials in high traffic Metrorail and Metrobus stations and buses/railcars.
	<i>Postcards</i>	Low	Postcards can be distributed at pop-ups, CBOs, and other locations in the community. They provide information about upcoming outreach activities and other feedback opportunities.
	<i>Email</i>	Low	Emails can target WMATA's SmarTrip Database, CBO databases, or neighborhood/special interest listservs.
	<i>CBO Promotion</i>	Moderate to High	Coordinate with community leaders and service providers to promote events.
	<i>Public School Promotion</i>	Moderate to High	Coordinate with schools to distribute flyers to students, post on school website/social media, or email to parents.

*For all outreach efforts and content types, WMATA may need to translate materials into appropriate language(s).*

### Project Branding

Not all projects need a project “brand;” a single bus route study or environmental impact analysis could use standard WMATA logos and document formats during project outreach. However an extended outreach project with multiple events and high levels of visibility could benefit from having a unique brand (including a logo and tagline) to briefly and effectively convey the meaning of the campaign and why the public should participate.

### Increasing Event Participation

Using marketing and communications materials at events is an effective way to increase visibility (particularly for events at crowded locations, including festivals and transit centers) and increase participation. At pop-ups, a tent and table set-up with WMATA branded tablecloth and a banner or signage that simply and clearly communicates WMATA's presence and purpose at the event should be used. Wayfinding signage at events, including transit centers, community centers, or other facilities, allows both people specifically looking for the event and passersby to quickly ascertain its presence and location. Distributing postcards to individuals at the event location and directing passersby to the event is also highly effective in increasing participation.

### Content Development Tips

**Audience Targeting:** Turnout at traditional public events (such as public hearings and workshops) is correlated with income and ethnicity, which means that low-income and minority participants are often not at the table. It is important to identify your audience and its preferred communication channels before marketing public outreach events. Refer to the “Media Outlet Preferences by Demographic Group” matrix for more detailed information on media targeting by demographic.



**Visual Communication:** Many constituents – especially Title VI protected populations – may be better served by visual representations, such as maps or diagrams, rather than blocks of text. Some LEP riders do not have strong literacy skills in their native languages, and many English-speaking, American-born adults also have significant literacy challenges.

**Standard Formats:** To ensure message and brand clarity, all documents related to a communication outreach campaign should have the same logo, document templates, and standardized format guidelines. If outreach consultants are preparing documents, be sure that they have all the relevant materials and logos.



### *Pop-Up Staffing*

Pop-up event staff fulfills two functions: they lead the event – gathering information or providing information to passersby – and they serve as public ambassadors for WMATA. Thoughtful pop-up event staffing will positively affect the performance of both the event and WMATA’s overall public image.

#### **Staffing Considerations**

***Culturally Appropriate Event Staff:*** WMATA has a large and diverse group of customers; potential public participants come from different races, ethnicities, and income levels. Some may not speak English as their first language. Event staff selection should be tailored to meet the language needs and reflect the cultural attributes of the of the target demographic(s).

***Street Team Staffing Agencies:*** The use of for-hire street teams is an effective way of providing additional staff for pop-up type outreach. Not all street teams are created equal; a really good team should bring energy and cheer to every event and help to attract riders and members of the public. Most staffing agencies need at least two weeks’ notice to work an event.

***A WMATA staff person should be present at every outreach event:*** A WMATA staff person should be able to answer questions on the particular outreach subject matter, guide outreach staff, manage materials, and respond appropriately to questions and comments unrelated to the project at-hand. This person is also responsible for producing the post-event summary.

#### **Staff Management Considerations**

***Street Team Training:*** Street Teams should be trained on the goals and the overall purpose of the event/campaign. They should be told the catch phrases and taglines that help to quickly communicate the event purpose and be instructed in the basic WMATA code of conduct, including how to answer specific transit related questions and how to direct people to the correct WMATA staff person.

***WMATA Coordination across Outreach Events:*** Outreach takes a lot of time and also can be tiring for staff that is not accustomed to interacting with the public or being on their feet for several hours at a time. It is important to pace and allocated outreach responsibilities appropriately and to have an internal tracking tool to keep track of staff participation.

***Event Staff Accountability:*** WMATA staff members leading outreach events need to be accountable for the professionalism, appearance, and effort exhibited. Turnout and participation are highly variable, but arriving on-time with all the needed supplies, following the schedule, and making the best out of any situation should be the standard, and staff should be held accountable to those standards.



### Survey Management Guidelines

A successful survey will reflect a project information need that can be fulfilled by a five-minute customer survey. To be effective, surveys should be short, simple, accessible, location sensitive, and professionally translated. To avoid survey fatigue by WMATA riders and the public at-large, surveys should only be used when the data has a real, direct application to the project planning process.

**Recommended Uses:** Low complexity issues, demographic data collection, transit use data, and high exposure for a larger outreach campaign.

### Survey Drafting Resources

#### Survey Design and Techniques

- Transportation Research Board, “On-Board and Intercept Transit Survey Techniques”: <http://www.tcrponline.org/PDFDocuments/tsyn63.pdf>

#### Field Testing and Question Development

- WMATA (Customer Research, External Relations, Equal Opportunity), CBOs

#### Survey Examples

- WMATA Bus Livability Project (*Love Your Bus Stop*), 2013
- 2012 BART Customer Satisfaction Survey: <http://www.bart.gov/sites/default/files/docs/BARTCustSat2012.pdf>

Steps
1. Determine what data is needed from the survey and how it will be used in the project.
2. Identify respondent geographies, Metrobus routes, or Metrorail lines.
3. Using the list of locations developed in the Project Outreach Plan, determine the best locations to administer a survey (on a Metrobus, at a Metrorail station, at a local festival, online, etc.). <sup>25</sup>
4. Based on respondent demographics, determine the languages into which the survey will need to be translated.
5. Based on data needed and respondent demographics, draft a survey that can be administered in person in five minutes or less. Be sure to include demographic questions.
6. Work with WMATA Customer Research and External Relations to develop an administration plan.
7. Field-test the survey with other WMATA offices and/or relevant CBOs.
8. Review how effective the survey was at reaching target populations and providing the necessary input.

<sup>25</sup> Consider the audience before placing a survey exclusively online; online surveys often have fewer minority, low-income, and LEP respondents than in-person surveys.



## Survey Tips

### Surveys Should Be Designed to Meet a Clear Purpose

Survey design should begin with a clear definition of what information the survey seeks to gather; this can be anything from public preferences for bus stop amenities to preferred methods for receiving emergency information. Survey designers should ensure that the questions they are asking can only be answered through a survey.

### Use Surveys Only When Appropriate

Surveys are great tools for gauging public response to issues that require very little background knowledge on the part of the respondent to provide an informed opinion. For example, as part of the *Love Your Bus Stop* Bus Livability project, WMATA used a survey to determine which bus stop amenities riders preferred. This was an appropriate project for survey use; members of the public could easily and quickly understand the need for bus amenities and provide an opinion. However, some of WMATA's more complex projects, including long-range planning activities, may require respondents to have detailed knowledge of the potential benefits and tradeoffs of proposed alternatives. In addition, when asked too often to take surveys, members of the public can experience survey fatigue – which causes response rates to fall.

### Keep Surveys Simple, Short, and Visual

WMATA's most effective surveys are its briefest ones; surveys should take no more than five minutes for a member of the public to complete, whether online or in-person. Project managers should build time into public participation schedules to field-test surveys and make adjustments to length or wording as needed before using the survey for their project. Questions should be simple and not involve tradeoff analyses, large tables, or a lot of text to understand the question. Likert scales (rating preferences on a number scale) are useful for gauging preferences. When possible, surveys should incorporate pictures to aid understanding when gathering responses from low literacy and limited English proficient individuals.

### When developing survey questions:<sup>26</sup>

**Avoid:** double negatives, probing questions, hypothetical questions, acronyms, slang, jargon, and technical terminology.

**Do:** make questions short, develop consistent response methods (e.g., checks, circles), sequence questions from the general to the specific, place questions with similar content together, make the questions as easy to answer as possible, provide clear and concise directions, and define unique and unusual terms.

All surveys must be approved by the Office of Customer Research.

<sup>26</sup> Adapted from "On-Board and Intercept Transit Survey Techniques," Transportation Research Board, 2005.



### Activity Design Guidelines

Activities at outreach events provide fun, game-like ways for the public to provide feedback and can also be used to draw in members of the public who might otherwise not be inclined to participate in the event.

Outreach event activities must be simple and engaging. Activities can be adult or child focused; usually children's activities are provided to give parents the opportunity to participate in the event. At workshops, activities should play off of the participants' experience and existing knowledge. Activities at pop-up events should be highly visible to draw people to the event. Activities must be staffed with someone who can quickly and simply explain the activity and encourage participation.

**Recommended Uses:** Obtain feedback on a straightforward topic, attract event participants, and provide entertainment for children while parents participate in the event.

#### Steps

1. Identify purpose (entertainment, feedback, eye catching draw)
2. Develop content  
*Allow two weeks for review by Communications Department*
3. Buy and prepare materials
4. Create easy instructions for event staff and participants
5. Arrange for transportation of the materials to and from events

#### Example Activities

##### Kids' Activities:

Foam door hangers with transit themed stickers.

*Supplies: kids table and chair, door hangers, box to hold the stickers, transit stickers, receptacle for sticker trash.*

WMATA coloring books and crayons.

*Supplies: kids table and chair, coloring books, crayons, box to hold the crayons.*

Hispanic Festival at Lane Manor Park,  
door hanger activity – Bus Livability  
outreach (Love Your Bus Stop)



## “Attraction” Activities

Connect4 with WMATA and project brand logo.

*Supplies: Connect4, branded stickers, box to put the loose game chips in.*

Tic-Tac-Toe on a poster board with WMATA and project brand logo.

*Supplies: Game poster, poster stand, branded “Xs” and “Os”, box to put the game pieces in, Velcro.*

## Feedback Activities

Bus service trade-off exercise to obtain preferences, e.g., service coverage or frequency.

*Supplies: Trade-off poster, double-sided tape, color coded stickers.*

Banner activity, such as a life-size bus stop with amenity options (some silly, some realistic) that can be placed in the thought bubble. Participants were encouraged to tweet their photos.

*Supplies: Activity banner, banner stand, banner weights, rope, curtain rings, clamps, A-frame sandwich board, laminated suggestion options, felt, velcro.*

*Hispanic Festival at Lane Manor Park*

**Southern Avenue Metrorail Pop-up: Tic-Tac Metro game – Public Participation Plan outreach (Speak Up! It's Your Ride)**



**Life-size bus stop – Bus Livability Outreach (Love Your Bus Stop)**



### CBO Meeting Guidelines

Meetings with the clients and/or staff of Community-Based Organizations (CBOs) can be structured as focus groups or as open format events held on site at the CBO. Since these meetings are conducted with the support of the CBOs, they are not open to the general public but rather are used to get or give information to the group(s) or demographic(s) that use that CBO's services. Depending on the size and reach of the CBO, these meetings can range from five to hundreds of people and should be structured accordingly.

#### Purpose

Gather opinions from or provide information to a specific demographic or geographic group and build a mutually beneficial relationship between WMATA and the CBO.

**Recommended Uses:** Medium to high complexity issues, issues that require the input of a specific (generally difficult to reach) group, topics that require education to support gathering informed opinions, and/or getting the right message out to others in that community.

#### Timing

Pre-Planning: 2 to 3 weeks	Event Planning: 2 to 6 weeks	Event: 1 to 4 hours	Closeout: 2 to 6 weeks
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#### Order of Operations

Steps	
Pre-Plan	Complete Project Communications and Outreach Plan
Event Planning	Choose event format and develop event plan
	Reach out to CBOs with event plan <i>Coordinate with External Relations Office Public Outreach Branch</i>
	Develop focus group questions/presentation/workshop materials <i>Provide additional two weeks for review by Customer Research</i>
	Confirm time, date, and location with participating CBO(s)
	Conduct a site visit of the CBO
	Print meeting materials and secure giveaways <i>Provide print shop with two weeks if producing boards or large maps</i>
Event	Hold CBO Meeting(s)
Closeout	Compile meeting and/or activity notes
	Analyze Results
	Provide event summary to External Relations Office Public Outreach branch
	Report results to relevant WMATA project decision-makers



Steps	
	Provide results to participants

### Budget Example

#### Direct Costs

Printed Materials

Translation Services

Giveaways

Snacks

### Supply Check List Example

- |  |  |                                     |                                 |   |
|--|--|-------------------------------------|---------------------------------|---|
| <input type="checkbox"/> Electronic Voting System                                      | <input type="checkbox"/> A/V Equipment               | <input type="checkbox"/> Giveaways  | <input type="checkbox"/> Snacks | <input type="checkbox"/> Translated Materials |
| <input type="checkbox"/> Relevant Metrobus schedules and other informational materials | <input type="checkbox"/> Workshop specific materials | <input type="checkbox"/> Event Plan | <input type="checkbox"/> Easels | <input type="checkbox"/> Waters               |

### Event Staff List Example

- |  |  |                                     |  |   |
|--|--|-------------------------------------|--|---|
| <input type="checkbox"/> Event Manager/Moderator | <input type="checkbox"/> WMATA Topic Specialist(s) | <input type="checkbox"/> Note-Taker | <input type="checkbox"/> Translator(s) | <input type="checkbox"/> Activity Staff |
|--|--|-------------------------------------|--|---|



### Public Hearing Guidelines

Public hearings must be held whenever a transit agency proposes a raise in any fare or rate, implements a major service reduction, adopts a mass transit plan, or institutes any capital improvements governed by the National Environmental Policy Act (NEPA), as required by federal law. Public notice must be published in one or more newspapers of general circulation at least 30 days before the hearing and once a week for two successive weeks prior to the event. The hearing format is formal and dictated by federal requirements. Besides these legally required activities, Public Hearings are not recommended as public outreach activities.

#### Purposes

Provide the public with a formal avenue to offer feedback in a public setting to high level WMATA officials.

**Recommended Uses:** When there is a significant change in fares and/or services or when a new, major transit project is being planned.

#### Timing

Pre-Planning: 2 to 3 weeks	Event Planning: 8 to 10 weeks	Event: 2 to 6 hours	Closeout: 2 to 6 weeks
----------------------------	-------------------------------	---------------------	------------------------

#### Order of Operations

	Steps
Pre-Plan	Complete Project Communications and Outreach Plan
	Identify hearing location(s), reserve space
Event Planning	Create media content <i>Provide 3 weeks for internal review</i>
	Develop hearing materials
	Promote the hearing(s) <i>Provide 30 days for ads to run in local newspapers</i>
	Reserve appropriate translation services and transcription services
Event	Hold public hearing
Close out	Write public hearing transcript
	Write Public Hearing Staff Report
	Provide results to relevant project decision-makers and WMATA Board
	Provide event summary to External Relations Office or the EREL Public Outreach branch
	Publish Public Hearing Staff Report, place it on project website, and email it to hearing participants



**Budget Example****Direct Costs**

Venue Fee	Branded Materials	Ads
Translation Services		

**Supply Check List Example**

- |  |                                     |  |   |
|--|-------------------------------------|--|---|
| <input type="checkbox"/> Relevant Metrobus schedules and other informational materials | <input type="checkbox"/> Easels     | <input type="checkbox"/> Informational Materials       | <input type="checkbox"/> Translated Materials |
| <input type="checkbox"/> A/V Equipment   | <input type="checkbox"/> Event Plan | <input type="checkbox"/> Wayfinding signs to the event | <input type="checkbox"/> Hearing Materials    |

**Event Staff List Example**

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Event Manager  | <input type="checkbox"/> WMATA Topic Specialist(s) | <input type="checkbox"/> Translator(s)           |
| <input type="checkbox"/> A/V Technician | <input type="checkbox"/> Court Reporter            | <input type="checkbox"/> WMATA Senior Management |



### Online Outreach Guidelines

Online outreach provides a forum to both inform the public about an initiative and solicit their feedback. Online outreach can be a WMATA webpage with a link to a survey, or it can involve web-based discussion platforms, such as MindMixer, MetroQuest, Userveice, and IdeaScale, which allow for discussions between the public and WMATA staff.

#### Purpose

Provide information to the public and collect feedback through surveys, forum discussions, and/or mini-polls in a way that is flexible for the public in terms of where and when they participate.

**Recommended Uses:** Low – medium complexity issues, exposure for a larger outreach campaign.

#### Timing

Pre- Planning: 2 to 3 weeks	Event Planning: 4 to 6 weeks	Event: 4 to 8 weeks	Closeout: 2 to 6 weeks
-----------------------------	------------------------------	---------------------	------------------------

#### Order of Operations

	Steps
Pre-Plan	Complete Project Communications and Outreach Plan
	Select web-based outreach tool
Event Planning	Procure web-based outreach tool
	Create media and advertising content <i>Provide two weeks for internal review</i>
	Survey/forum design and testing for mobile compatibility, if applicable <i>Provide three weeks for review by Customer Research and three weeks for survey translation and review</i>
	Develop detailed online outreach plan of questions and topics for discussion
	Release advertisements
Event	Open online outreach forum
	Continue to promote online outreach forum
	Close online outreach forum
Closeout	Provide Event Summary to External Relations Office Public Outreach branch
	Analyze Responses
	Provide Result to Participants and WMATA



**Budget Example****Direct Costs**

Ads and collateral

Web-platform

**Supply Check List Example**

- ☐
- Contract with online forum vendor

**Event Staff List Example**

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Web forum<br>Manager | <input type="checkbox"/> WMATA Topic Specialist(s) | <input type="checkbox"/> WMATA Senior<br>Management |
|---|--|---|



### Focus Group Guidelines

Focus group meetings are designed to provide a comfortable space for guided, thoughtful discussion on a specific topic. Focus groups should have no less than six and no more than sixteen participants. Depending on the topic, focus group participants should be selected and invited based on their knowledge and experience on the subject matter, their demographic (race, ethnicity, income, disability status, etc.), or where they live or work. Focus group meetings often include an educational or informative presentation or activity to inspire discussion.

#### Purposes

Collecting informed opinions on both concrete and abstract issues can help deepen WMATA's understanding of a persistent challenge or problem, gauge public reaction in advance of a big project rollout, or better understand the needs and challenges of a particular group of people.

**Recommended Uses:** Medium to high complexity issues, inform project planning and/or design, consult with experts, representatives, or the public on sensitive issues.

#### Timing

##### Direct Costs

Ads and collateral

Web-platform

#### Order of Operations

Steps	
Pre-Plan	Complete Project Communications and Outreach Plan
Event Planning	Write focus group Event Plan
	Develop focus group guide <i>Allow two weeks for review by Customer Research</i>
	Identify possible focus group participants and meeting space
	Reach out to potential participants with outreach plan and timeline <i>Coordinate with External Relations Public Relations branch</i>
	Confirm time, date, and location with participants
	Procure translators
	Obtain meeting materials and giveaways
Event	Hold Focus Group
Closeout	Write-up focus group notes
	Provide Event Summary to External Relations Office Public Relations branch
	Provide result to participants and WMATA



**Budget Example****Direct Costs**

Venue Fee

Translation Services

Facilitator Fee

**Supply Check List Example**

- |  |  |                                    |  |
|--|--|------------------------------------|--|
| <input type="checkbox"/> A/V equipment     | <input type="checkbox"/> Relevant Metrobus schedules and other informational materials | <input type="checkbox"/> Easels    | <input type="checkbox"/> Snacks/ water |
| <input type="checkbox"/> Project Materials | <input type="checkbox"/> Translated Materials  | <input type="checkbox"/> Giveaways |  |

**Event Staff List Example**

- |   |  |  |                                     |
|---|--|--|-------------------------------------|
| <input type="checkbox"/> Event Manager/ Facilitator | <input type="checkbox"/> WMATA Topic Specialist(s) | <input type="checkbox"/> Translator(s) | <input type="checkbox"/> Note-Taker |
|---|--|--|-------------------------------------|



### Pop-Up: Festival Guidelines

Pop-up events are designed to provide the feeling of an “instant” outreach program. They are located where people are, rather than requesting that they come to a meeting. Pop-up events at festivals provide outreach staff with access to large numbers of people over an extended period of time. Specific festivals can be used to target particular demographic and/or geographic groups. Preparing materials for pop-ups is generally a large time commitment, so pop-ups are most cost-effective when a series of them can be held in different locations to leverage the investment.

#### Purpose

Reach a large number of people at a single event, gather opinions via a survey, and/or publicize a WMATA program or project.

**Recommended Uses:** Low complexity issues, demographic data collection, transit use data, high exposure for a larger outreach campaign.

#### Timing

##### Direct Costs

Venue Fee

Translation Services

Facilitator Fee

#### Order of Operations

Steps	
Pre-Plan	Complete Project Communications and Outreach Plan
Event Planning	Create media content <i>Provide two weeks for internal review</i>
	Develop informational materials <i>Provide 1 week for review of printed materials and 3 weeks for printing</i>
	Develop survey (if applicable) <i>Provide three weeks for review by Customer Research</i>
	Select event location(s) based on target population <i>Festivals generally require a deposit a minimum of four weeks prior to the event</i>
	Develop detailed Event Plan
	Place ads, distribute promotional materials (including website) <i>Provide three weeks for bus cards to be installed and for ads to run in local newspapers</i>
	Procure Street Team <i>Require at least two weeks' notice prior to event</i>
Event	Hold Event



Closeout	Analyze survey responses <i>(if applicable)</i>
	Provide event summary to the External Relations Office Public Relations branch
	Provide results to relevant WMATA project decision-makers
	Provide results to participants

### Budget Example

#### Direct Costs

Venue Fee	Project Branded Attire and Materials (if applicable)	Promotional Advertising (e.g., radio, flyers, if applicable)
Translation Services	Street Team Staffing	Giveaways and Activity costs

### Supply Check List Example

☐ Outreach Kit<sup>27</sup>    ☐ Event Plan

### Event Staff List Example

☐ Event Manager    ☐ WMATA Topic Specialist    ☐ Translator(s)    ☐ Street Team

<sup>27</sup> See Outreach Kit description in the following section, “Additional Event Planning and Reporting Tools.”

### Pop-Up: Transit Guidelines

Pop-up events are designed to provide the feeling of an “instant” outreach program. They are located where people are, in this case, at busy bus stops, bus transfer stations, Metrorail stations, or on Metrobus or Metrorail cars. Transit location pop-ups can be held as a single event or part of a larger outreach campaign.

#### Purposes

Exclusively reach transit users, gather opinions via a survey, distribute information, and/or publicize a WMATA outreach campaign.

**Recommended Uses:** Low complexity issues, demographic data collection, transit use data.

#### Timing

Pre-Plan: 2 to 3 weeks	Event Planning: 4 to 10 weeks	Event: 2 to 3 hours	Closeout: 5 to 8 weeks
------------------------	-------------------------------	---------------------	------------------------

#### Order of Operations

	Steps
Pre-Plan	Complete Project Communications and Outreach Plan
Event Planning	Create media content <i>Provide 3 weeks for internal review</i>
	Develop informational materials <i>Provide 1 week for review of printed materials and 3 weeks for printing</i>
	Develop survey (if applicable) <i>Provide 3 weeks for review by Customer Research Office</i>
	Select event location(s) based on target population <i>Notify transit police, station managers, or proper operations staff</i>
	Develop detailed Event Plan
	Place ads, distribute promotional materials (including website) <i>Provide 3 weeks for bus cards to be installed and for ads to run in local newspapers</i>
	Procure Street Team <i>Require at least 2 weeks' notice prior to event</i>
Event	Hold Event(s)
Closeout	Analyze survey responses
	Provide event summary to the External Relations Office Public Outreach branch
	Provide Result to Participants and WMATA



**Budget Example****Direct Costs**

Street Team	Branded Materials	Ads
Transport Costs (gas/mileage)	Translation Services	Giveaways

**Supply Check List Example**

- ☐ Outreach Kit<sup>28</sup>      ☐ Event Plan

**Event Staff List Example****Minimum Number of Event Staff: 5**

- ☐ Event Manager      ☐ WMATA Topic Specialist      ☐ Street Team      ☐ Translator(s)

<sup>28</sup> See Outreach Kit description in the following section, “Additional Event Planning and Reporting Tools.”



*Pop-Up: Commercial and Residential Guidelines*

Pop-up events are designed to provide the feeling of an “instant” outreach program. They are located where people are, in this case, at busy commercial centers or large residence buildings during high pedestrian traffic hours.

**Purposes**

Reach the community at large, including both transit users and non-users, gather opinions via a survey or distribute information, and/or publicize a WMATA outreach campaign.

**Recommended Uses:** Low complexity issues, demographic data collection, transit use data.

**Timing**

Pre-Planning: 2 to 3 weeks	Event Planning: 4 to 10 weeks	Event: 2 to 3 hours	Closeout: 5 to 8 weeks
----------------------------	-------------------------------	---------------------	------------------------

**Order of Operations**

Steps	
Pre-Plan	Complete Project Communications and Outreach Plan
Event Planning	Create media content <i>Provide 3 weeks for internal review</i>
	Develop informational materials <i>Provide 1 week for review of printed materials and 3 weeks for printing</i>
	Develop survey (if applicable) <i>Provide 3 weeks for review by Customer Research</i>
	Select event location(s) based on target population and request permission to hold the event
	Develop detailed Event Plan
	Procure Street Team <i>Require at least 2 weeks' notice prior to event</i>
	Place media <i>Provide 3 weeks for bus cards to be installed and for ads to run in local newspapers</i>
Event	Hold Event
Closeout	Analyze survey responses
	Provide event summary to the External Relations Office Public Outreach branch
	Provide Result to Participants and WMATA



### Budget Example

#### Direct Costs

Venue Fee	Branded Materials	Ads
Translation Services	Street Team	Giveaways
Transport Costs (gas/mileage)		

### Supply Check List Example

- ☐ Outreach Kit<sup>29</sup> ☐ Event Plan

### Event Staff List Example

- ☐ Event Manager ☐ WMATA Topic Specialist ☐ Street Team ☐ Translator(s)

<sup>29</sup> See Outreach Kit description in the following section, “Additional Event Planning and Reporting Tools.”

### *Community Meeting/Workshop Guidelines*

Community meetings are formal or informal opportunities for project staff to receive feedback in an interactive setting. They are held in a public space and open to the general public, although individuals or groups may be specifically invited. Community meeting formats include workshops, charrettes, and open houses. Community meetings can range from a dozen to several hundred participants.

#### **Purpose**

Provide the public with information on a plan or project and solicit their feedback with the intent of using the information to develop possible plan recommendations or solutions.

**Recommended Uses:** Medium to high complexity issues (trade-offs and ranked choices), inform the development of transit planning solutions or options, consult with interested constituencies on complicated issues.

#### **Timing**

Pre-Planning: 2 to 3 weeks	Event Planning: 3 to 8 weeks	Event: 1 to 8 hours	Closeout: 2 to 6 weeks
----------------------------	------------------------------	---------------------	------------------------

#### **Order of Operations**

Steps	
Pre-Plan	Complete Project Communications and Outreach Plan
	Choose event format and activities
	Create meeting participant invitation list
	Recruit event volunteers/staff for event
Event Planning	Invite participants and provide public notice
	Develop event materials (papers, boards, etc.)
	Develop detailed event plan
	Procure translators
	Follow-up invitation and public notice
	Train staff and/or volunteers
Event	Hold Event
Closeout	Compile activity results
	Analyze results and report findings
	Provide event summary to the External Relations Office Public Outreach branch
	Provide Results to Participants and WMATA



### Budget Example

#### Direct Costs

Printed Materials

Translation Services

Giveaways

Ads

Venue Fee

Food

### Supply Check List Example

- |                                 |  |  |  |   |
|---------------------------------|--|--|--|---|
| <input type="checkbox"/> Dolly  | <input type="checkbox"/> A/V equipment | <input type="checkbox"/> Relevant Metrobus schedules and other informational materials | <input type="checkbox"/> Project Materials             | <input type="checkbox"/> Giveaways                |
| <input type="checkbox"/> Food   | <input type="checkbox"/> Event Plan    | <input type="checkbox"/> Activity Materials (Boards, Maps, etc.)                       | <input type="checkbox"/> Translated Activity Materials | <input type="checkbox"/> Electronic Voting System |
| <input type="checkbox"/> Easels | <input type="checkbox"/> Water         |  |  |   |

### Event Staff List Example

- |  |  |  |   |
|--|--|--|---|
| <input type="checkbox"/> Event Manager | <input type="checkbox"/> WMATA Topic Specialist(s) | <input type="checkbox"/> Translator(s) | <input type="checkbox"/> Activity Staff |
|--|--|--|---|



## Additional Event Planning and Reporting Tools

A uniform WMATA Event Plan form and a Post-Event Summary form (individual summary forms for community-based organization meetings, community meetings, and pop-ups) are provided here to help plan for and document the results of WMATA’s public participation activities. Both of these forms will be available as web-based forms through WMATA’s internal SharePoint site.

The event plan should be developed by the project manager and distributed to all individuals (including contractors) at least one week prior to the event. Once completed, the Event Plans and Post-Event Summary documents will be automatically transmitted to the Office of External Relations Public Outreach branch for use in tracking results and performance measures.

The “Outreach Kit” supply list included as part of the supply list in the pop-up guidelines is detailed in the first table in this section. Staff can refer to this table to determine what they need to bring to an individual event. Several complete Outreach Kits should be maintained at the WMATA office at all times by the External Relations Office Public Outreach branch for use in public participation activities as needed.



*Outreach Kit – Supply List*

Material	Required? (Yes or No)	Number Required	Notes
Campaign Clothing			
Postcards			
Survey Device			
Folding Table (8 ft)			
Folding Chairs			
Name Tags (hello my name is)			
Paper Weights			
Clip Boards			
Campaign Banner			
Large Photography Clamps			
Thin Rope or Twine			
Plastic Bins for Carrying Materials			
Collapsible Dolly			
Blank Notebook			
Pens			
Markers (Sharpie)			
Masking Tape			
Scissors			
Double-Sided Tape			
Scotch Tape			
Bottled Water			
Extension Cord			
Surge Protector			
Golf Pencils			
Metrobus System Maps by Jurisdiction			
SmarTrip® Information			
WMATA Pocket Guide			
Title VI Brochure			
WMATA Comment Card			
8.5x11 Table Stand and Inserts			
WMATA Table Cloth			
Giveaways			



*Event Plan*

Project, Phase and Event	
Project	
Phase	
Event Type	
Event Number (if applicable)	

Date, Time and Location	
Event Date	
Event Time	
Event Address <i>(include city and state)</i>	
Room Number <i>(if applicable)</i>	

Staff	Name	Cell Phone Number	Responsibility
Staff (Lead)			
Additional Staff			
Translators/Interpreters			
Contact at Event Site			

Event Materials	Number	Languages	Responsibility

<b>Event Overview</b> <i>(three sentences or less)</i>
--

*What will happen at the event?*

<b>Event Strategy and Purpose</b>
-----------------------------------

*What is the goal of this event, and how will it meet the project's public involvement needs? What is the specific purpose of this event?*

<b>Event Layout</b>
---------------------

*How will the event be set up (e.g., outside setup with a table and a tent, or inside with auditorium style seating)?*



**Event Promotion**

*How has the event been promoted and advertised to potential participants (include type and location of TV/newspaper/radio/online ad buys, placement of flyers, social media strategies, etc.)?*

**Staff Conduct Responsibilities**

*All staff present at events must adhere to the following conduct guidelines:*

- **Safety:** You are expected to observe and follow all the safety and security policies of WMATA. You are also encouraged to report unsafe conditions to your supervisor.
- **Respect:** Staff members should have a respectful and positive attitude that is sensitive to the needs and abilities of all participants. The general public must receive prompt and courteous attention and helpful responses to their questions or requests. All members of the public must be treated with tact, courtesy, and cultural sensitivity.
- **Dress Code:** Official campaign clothing (if applicable), non-jean pants, and close-toed shoes.



## Additional Event Planning and Reporting Tools

A uniform WMATA Event Plan form and a Post-Event Summary form (individual summary forms for community-based organization meetings, community meetings, and pop-ups) are provided here to help plan for and document the results of WMATA’s public participation activities. Both of these forms will be available as web-based forms through WMATA’s internal SharePoint site.

The event plan should be developed by the project manager and distributed to all individuals (including contractors) at least one week prior to the event. Once completed, the Event Plans and Post-Event Summary documents will be automatically transmitted to the Office of External Relations Public Outreach branch for use in tracking results and performance measures.

The “Outreach Kit” supply list included as part of the supply list in the pop-up guidelines is detailed in the first table in this section. Staff can refer to this table to determine what they need to bring to an individual event. Several complete Outreach Kits should be maintained at the WMATA office at all times by the External Relations Office Public Outreach branch for use in public participation activities as needed.



*Outreach Kit – Supply List*

Material	Required? (Yes or No)	Number Required	Notes
Campaign clothing			
Postcards			
Survey device			
Folding table (8 ft)			
Folding chairs			
Name tags (hello my name is)			
Paper weights			
Clip boards			
Campaign banner			
Large photography clamps			
Thin rope or twine			
Plastic bins for carrying materials			
Collapsible dolly			
Blank notebook			
Pens			
Markers (sharpie)			
Masking tape			
Scissors			
Double sided tape			
Scotch tape			
Bottled water			
Extension cord			
Surge protector			
Golf pencils			
Metrobus system maps by jurisdiction			
SmarTrip® Information			
WMATA Pocket Guide			
Title VI brochure			
WMATA Comment Card			
8.5x11 table stand and inserts			
WMATA table cloth			
Giveaways			

*Event Plan*

Project, Phase and Event	
Project	
Phase	
Event Type	
Event Number (if applicable)	

Date, Time and Location	
Event Date	
Event Time	
Event Address <i>(include city and state)</i>	
Room Number <i>(if applicable)</i>	

Staff	Name	Cell Phone Number	Responsibility
Staff (Lead)			
Additional Staff			
Translators/Interpreters			
Contact at Event Site			

Event Materials	Number	Languages	Responsibility

<b>Event Overview</b> <i>(three sentences or less)</i>
--

*What will happen at the event?*

<b>Event Strategy and Purpose</b>
-----------------------------------

*What is the goal of this event, and how will it meet the project's public involvement needs? What is the specific purpose of this event?*

<b>Event Layout</b>
---------------------

*How will the event be set up (e.g., outside setup with a table and a tent, or inside with auditorium style seating)?*



**Event Promotion**

*How has the event been promoted and advertised to potential participants (include type and location of TV/newspaper/radio/online ad buys, placement of flyers, social media strategies, etc.)?*

**Staff Conduct Responsibilities**

*All staff present at events must adhere to the following conduct guidelines:*

- **Safety:** Observe and follow all the safety and security policies of WMATA. Report unsafe conditions to your supervisor.
- **Respect:** Staff members should have a respectful and positive attitude that is sensitive to the needs and abilities of all participants. The general public must receive prompt and courteous attention and helpful responses to their questions or requests. All members of the public must be treated with tact, courtesy, and cultural sensitivity.
- **Dress Code:** Official campaign clothing (if applicable), non-jean pants, and close-toed shoes.



*Post Event Summary*

## 1. Event Logistics

Project, Phase and Event	
Project	
Phase	
Event Type	
Event Number <i>(if applicable)</i>	

Date, Time and Location	
Event Date	
Event Time	
Event Address <i>(include city and state)</i>	
Room Number <i>(if applicable)</i>	

Staff	Name	Cell Phone Number	Responsibility
Staff (Lead)			
Additional Staff			
Translators/Interpreters			
Contact at Event Site			

## 2. Information and Methods

## Event Materials

Indicate all outreach materials distributed at the event, distribution method, language, number brought to the event, and number distributed at event.

Event Outreach Materials	Distribution Method	Language of Materials	Number Brought to Event	Number Distributed at Event
	<input type="checkbox"/> In Person <input type="checkbox"/> Online			
	<input type="checkbox"/> In Person <input type="checkbox"/> Online			

## 3. Participation



## Participation

Please fill in the “Event Attendees” section of the table below. Indicate the number of event attendees and the percent of total attendees that were minority, low-income, and LEP in the tables below. This information can be found in comment cards or sign-in sheets. If an event did not collect any demographic information, please type N/A in the table below. For CBO Meetings, skip to “CBO Meetings” below.

Demographic Groups	Number	% of Event Participants or Survey Respondents*
<b>Total Participants</b>		100%
<b>Minority</b>		
<b>Low Income</b>		
<b>Other Project Group:</b>		
<b>LEP</b>		

*\*Note: not everyone will provide this information. If the event involves a survey, the percent should be calculated based on the respondents to the given question.*

If the event includes meeting with a representative from a CBO, indicate below the name of the CBO, the constituency they represent, and the date of the meeting.

CBO Name	Contact Name	Constituency <sup>30</sup>	Event Date

## 4. Event Feedback

Indicate which feedback formats were used at the event, and then write a summary of the feedback received, using the guidelines below for each event type. After the feedback summary, fill out the customer service feedback summary for all events that gathered comment cards from participants. (N/A for Public Information Campaign)

Event	Feedback Format				
<b>CBO Meeting</b>	<input type="checkbox"/> CBO Meeting Notes	<input type="checkbox"/> Comment Cards	<input type="checkbox"/> Other		
<b>Community Meeting or Open House</b>	<input type="checkbox"/> Community Meeting/Workshop Notes	<input type="checkbox"/> Electronic Voting	<input type="checkbox"/> Survey	<input type="checkbox"/> Comment Cards	<input type="checkbox"/> Other
<b>Pop-Ups</b>	<input type="checkbox"/> Survey	<input type="checkbox"/> Comment Cards	<input type="checkbox"/> Other		
<b>Public Hearing</b>	<input type="checkbox"/> Public Hearing Questions/Comments	<input type="checkbox"/> Comment Cards	<input type="checkbox"/> Survey	<input type="checkbox"/> Other	
<b>Project Survey</b>	<input type="checkbox"/> Survey				

<sup>30</sup> LEP (by language), Minority (specify ethnic group(s) if applicable), or Low-Income.



Event	Feedback Format				
Online Event	<input type="checkbox"/> Online Comments	<input type="checkbox"/> Other			
Focus Group	<input type="checkbox"/> Focus Group Notes	<input type="checkbox"/> Comment Cards	<input type="checkbox"/> Other		

## Feedback Summary Guidelines

- CBO Meetings and Focus Groups: The structure of the feedback summary should reflect the questionnaire used to facilitate the meeting. Include key recommendations for WMATA.
- Community Meetings/Workshops: The structure of the feedback summary should reflect the results of table exercises and any other activities. Include key recommendations for WMATA.
- Pop-Ups: The structure of the feedback summary should reflect the 1) comment cards, 2) conversations staff has with survey respondents, and 3) Number of surveys completed.
- Public Hearings: The structure of the feedback summary should reflect public hearing comments and comment cards (if applicable). Include key recommendations for WMATA.
- Online Event: The structure of the feedback summary should reflect feedback received at each stage of the event (i.e., Q&A during a webinar or feedback to a MindMixer activity).
- Surveys: For all events with surveys, include number of surveys completed at the event. The complete survey analysis will be in the Post Project Evaluation. This will include surveys collected at events and those completed on-line as part of the project.

## Feedback Summary

### Customer Satisfaction Feedback

Comment cards from this event yielded an average of “good” or higher rating for Questions 1-3:

☐ Yes ☐ No

## 5. Lessons Learned for Future Outreach Events

*Was anything learned at this event that could inform future outreach?*

## 6. Follow-Up

*If the event collected email addresses from participants for follow-up, please enter them here.*



## Other Follow-Up

List any follow-up actions (e.g., provide information on how to register for a Senior SmarTrip® card or a specific service concerns) and who will be completing these follow-up actions and by when.

Follow-Up Action	Responsibility (WMATA)	Target Follow-Up Completion Date

## 7. Photos

*(optional) Please insert photos from the event:*

Photo 1	Photo 2



*Post Project Evaluation*

PERFORMANCE MEASURE EVALUATION	ANSWER
1. Were outreach materials translated into all of the key languages identified in Project Communications and Outreach Plan, and were they available at the events?	
2. What percent of total event advertisements and notices were placed in non-English language media?	
3. What percent of event advertisements were published three weeks before event ( <i>N/A for focus groups</i> )?	
3. What percent of outreach events meet the attendance goal for that type of event?	
4. Overall, did participation rates by minority, low-income, and LEP groups in the outreach events meet or exceed the demographics of the project population? What was the percent difference for each event?	
5. Did the outreach activities receive an average of “good” or higher rating from post-event comment card or survey for each project event? (Questions 1-3)	
6. Did the project manager summarize the key lessons learned for future outreach events?	
7. If applicable*, did the project manager summarize the key recommendations from the public and explain why these could be implemented or why they could not be?	
8. Were these recommendations* communicated back to outreach participants who provided an email address and CBOs who requested to stay in touch?	
9. If applicable**, is there a process in place for keeping in touch with outreach participants and CBOs in the period between project planning and implementation?	
10. Is there a clear process for re-informing** the public (including the key demographic groups from the project) when elements of the project are implemented?	

\* As established in the PCOP, the role of public outreach on some projects may simply be to “inform” the public and not to gather input specifically. In these cases, follow-up with the public may not be necessary. The project manager should consult with others on the project team to determine if this is the case for their project.

\*\* In some cases, implementation may occur months or years after the project has been studied. In these cases, the project manager should set up a process to keep the public informed over-time



## Chapter 6 – Performance Measures

Chapter 6 provides information on the performance measures that the Washington Metropolitan Area Transit Authority (WMATA) will use to track PPP implementation and assist project managers in the Office of External Relations with tracking the efficacy of their outreach efforts.

WMATA is dedicated to Authority-wide performance monitoring and evaluation at all levels, including the key performance indicators (KPI) program that monitors ongoing and long-term progress towards WMATA's strategic goals. To reflect WMATA's commitment to performance measurement and meet its requirement to update its Title VI program every three years, a performance measurement framework has been developed for both the PPP and individual projects.

### Summary of Key Findings

Chapter 6 includes performance measure frameworks used to track the efficacy of the Public Participation Plan, as well as individual projects. Key strategies include:

- The PPP performance-measures language (Strategies, Actions, Performance Measures, and Targets) aligns with language used by WMATA's Office of Performance, which tracks performance measurement across all departments.
- WMATA's strategies reflect a three-part framework for understanding all outreach events: 1) Participant Demographics, 2) Participant Feedback, and 3) Participant Follow-up.
- WMATA's PPP performance measure data will be collected through four discrete reporting requirements:
  - Project Communications and Outreach Plan ,
  - Post-Event Summaries,
  - Post-Project Evaluations, and
  - Annual PPP Performance Measurement Review.
- The data collection supporting each of these reporting requirements, and the overall public participation performance measures, comes from three discrete questionnaires/surveying efforts:
  - Comment cards about Public Participation at public outreach events,
  - Public participation questions at end of all WMATA public outreach surveys, and
  - An annual survey of CBOs.
- At the end of each public outreach event, the Project Manager or staff will write a Post-Event Summary that provides basic information about target audience participation and a summary of event feedback. A Post-Event Summary template is included in Chapter 5 of the PPP.



- At the end of a public outreach campaign or project, the Project Manager will work with EREL to compile a Post-Project Evaluation, which will aggregate all output measures recorded in the Post-Event Summaries. A Post-Project Evaluation template is included in Chapter 5 of the PPP.
- EREL's Public Participation Manager will produce an annual Performance Measurement Review of all outreach activities conducted throughout the year, which will aggregate measures from the Post-Project Summaries and the results of the annual survey of CBOs. The annual Performance Measurement Review will provide an overview of outreach activities throughout the year, identifying practices that were successful and recommending future outreach practices based on lessons learned.
- WMATA should fully incorporate the performance measure framework into its agency-wide Performance Measure tracking system, especially for departments that conduct public outreach events or campaigns.



## Performance Measurement for Public Participation

WMATA is dedicated to Authority-wide performance monitoring and evaluation at all levels, including through the key performance indicators (KPI) program that monitors ongoing and long-term progress towards WMATA's strategic goals. WMATA's Office of Performance, established in 2009, produces the Vital Signs Report to regularly track progress and share results with the Authority's Board of Directors, jurisdictional stakeholders, and the general public. KPI tracking and reporting is part of the Authority's commitment to transparency and accountability. To reflect WMATA's commitment to performance measurement and meet its requirement to update its Title VI program every three years, a performance measurement framework has been developed for both the PPP and individual projects. The measures detailed in this document will be used to track PPP implementation and assist project managers and the Office of External Relations in tracking the efficacy of their outreach efforts. As the PPP is fully integrated into WMATA's business processes, the Authority should work to align PPP performance measures with those already tracked by the Office of Performance.

### *Types of Performance Measures*

Performance measures can be divided into three types: inputs, outputs, and outcomes.<sup>31</sup> The first type of performance measures are inputs, which reflect the amount of resources used (e.g., amount of money spent on media purchases, number of staff present at each public workshop). The second type of measure is output, which measures the amount of products and services delivered (e.g., the number of event attendees, number of surveys completed). The third type of measure is outcome, which tracks changes in conditions, behavior, or attitudes that indicate progress toward a program's goals and objectives (e.g., percentage of Community Based Organizations who felt WMATA made an effort to create a sustained and meaningful relationship).

The difference between measuring outputs and measuring outcome has been described as the difference between measuring program efficiency and program effectiveness.<sup>32</sup> In public outreach, outputs track the dissemination of public information, while outcome tracks how the public reacts to the outreach. Although outcome performance measures are very valuable in tracking performance and impact, they are also more difficult to measure. Generally, the evaluating agency must conduct a user survey to gather qualitative measures about participants' attitudes and reaction to the public outreach.

## WMATA Performance Measures

The following section outlines performance measures to track WMATA's public participation effectiveness. The language of the performance measures (Strategies, Actions, Performance Measures, and Targets) aligns with language used by WMATA's Office of Performance, which tracks performance measurement across all departments. Measures include a combination of input performance measures, output performance measures, and outcome performance measures. Example input measures include the number of materials distributed at outreach events; output measures include the percentage of

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<sup>31</sup> Wagner, 42; CUTR, 6; Florida DOT 10-3.

<sup>32</sup> Center for Urban Transportation Research. (2008). Performance Measures to Evaluate the Effectiveness of Public Involvement Activities in Florida, 8.

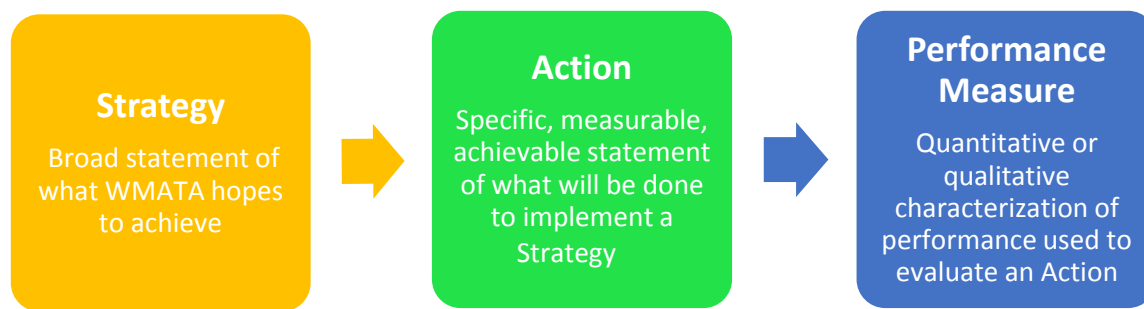


event advertisements published three weeks or more before an event; outcome measures consist partly of the percentage of positive ratings from CBO surveys.

### *Performance Measurement Framework*

Before a transit agency can measure the performance of its Public Participation Plan, it first must establish a set of overarching strategies and actions for public participation. All actions should be “SMART,” that is, they should be **s**pecific, **m**easurable, **a**ctionable, **r**ealistic, and **t**imebound. Once the strategies and actions are defined, the agency can develop performance measures to track progress toward each action. WMATA’s strategies reflect a three-part framework for understanding all outreach events: 1) Participant Demographics, 2) Participant Feedback, and 3) Participant Follow-up.

**Figure 12 Performance Measurement Framework**



Once performance measures are established, WMATA should review baseline data and may set a target for each measure or simply track improvement. Successful programs often cite the importance of producing two reporting products, the first of which is aimed at the general public, while the second is a more in-depth internal report with feedback mechanisms to incorporate performance results into future agency operations.<sup>33</sup> How performance data is reported and incorporated into future agency plans and actions varies, but WMATA should fully incorporate the performance measure framework into its agency-wide Performance Measure tracking system, especially for departments that conduct public outreach events or campaigns.

### *Performance Measure Data Collection*

WMATA’s PPP performance measure data will be collected through four discrete reporting requirements:

- Project Outreach Plan,
- Post-Event Summaries,
- Post-Project Evaluations, and
- Annual PPP Performance Measurement Review.

<sup>33</sup> Arlington County Commuter Services. (2012). *Arlington County Commuter Services Performance Measures State of the Practice*.

Templates for the Project Outreach Plan, Post-Event Summary, and Post-Project Evaluation are available in Chapter 5 of the Public Participation Plan, as part of the larger Project Outreach Plan Toolkit.

At the beginning of each public outreach project or campaign, the technical Project Manager and EREL will together create a project communications and outreach plan that includes a detailed timeline and task list. Many of these tasks, including event location, language accessibility, ADA and transit accessibility, and marketing efforts will feed directly into the performance measures via the Project Outreach Plan online form.

At the end of each public outreach event, the Project Manager or staff will write a Post-Event Summary that provides basic information on target audience participation and a summary of event feedback. A Post-Event Summary template is included in Chapter 5 of the PPP.

At the end of the public outreach campaign or project, the Project Manager will work with EREL to compile a Post-Project Evaluation, which will aggregate all output measures recorded in the Post-Event Summaries. A Post-Project Evaluation includes a summary of all outreach activities, locations, attendance, survey results, and feedback. A Post-Project Evaluation template is included in Chapter 5 of the PPP.

Lastly, EREL's Public Participation Manager will produce an annual Performance Measurement Review of all outreach activities conducted throughout the year. This annual report will aggregate measures from the Post-Project Summaries and the results of the annual survey of CBOs described below. The annual Performance Measurement Review will provide an overview of outreach activities throughout the year, identifying practices or locations that were successful. It will draw conclusions for future outreach based on lessons learned.

The data collection supporting each of these reporting requirements and the overall public participation performance measures comes from three discrete questionnaires/surveying mechanisms:

- Comment cards about Public Participation at public outreach events,
- Public participation questions at end of all WMATA public outreach surveys, and
- An annual survey of CBOs.

Comment cards will be distributed at all community meetings and public events. The cards are designed for participants to evaluate the event and to note to what extent they felt encouraged to express their concerns or ask questions. A sample comment card is provided in Figure 14. The comment cards will be printed with English on one side and Spanish on the reverse. Comment cards in additional languages, including Mandarin Chinese, Korean, Vietnamese, and Arabic, will be made widely available.

The second mechanism adds up to three “outcome-oriented” questions to the end of any survey WMATA produces and uses at public outreach events. These questions should be brief to avoid potentially frustrating participants with a second set of long questions. Instead, WMATA should add two to three questions to the end of the outreach survey asking participants to rate their experience. Figure 15 provides an example of three potential questions that could be added to the end of a survey.

The third mechanism is an annual survey of CBOs that asks the organizations to 1) rate WMATA's effort to maintain a high-quality, consistent relationship with the group and 2) provide specific feedback on



WMATA's outreach efforts during the year. The CBO survey will also provide these organizations with an opportunity to relate any specific concerns or request they have related to transit service or other functions of WMATA as well. The annual CBO survey would specifically be used in the Annual Performance Measurement Review for public participation at the agency level. The survey would be sent only to those CBOs that have participated in a WMATA outreach effort in the preceding year. This effort would provide a rich source of outcome variables that could be used to evaluate WMATA's public outreach.

Figure 13 shows how each data set would flow into each of the three reporting requirements.

**Figure 13 Data Collection for Performance Measurement**

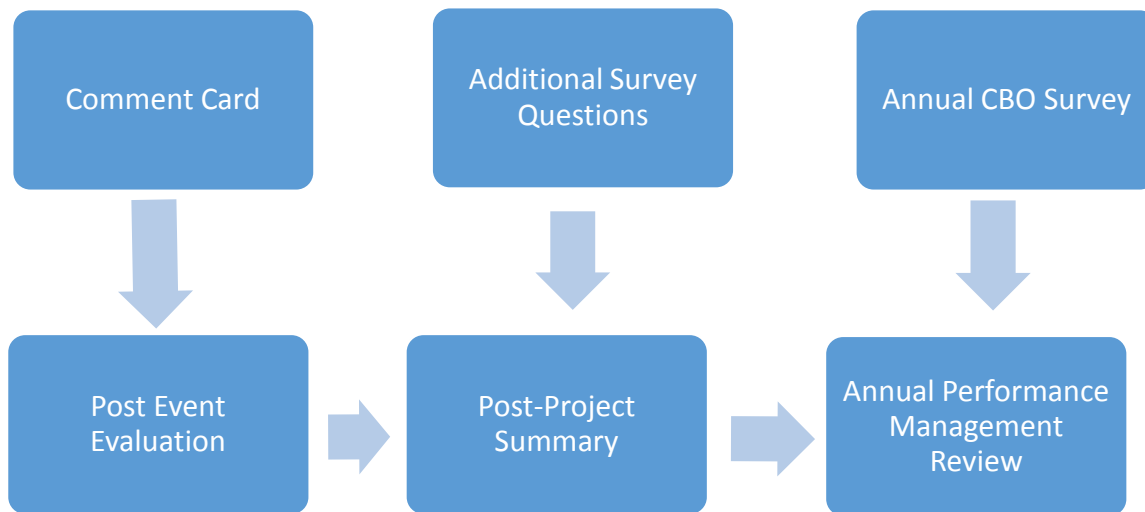


Figure 14 Sample Public Participation Comment Card



### WMATA Public Participation Comment Card

*Thank you for participating in today's event! WMATA wants to make sure we hear from all of our customers. Please take a moment to complete this short information card to help us plan future public events. **All information on this form is confidential.***

**1. First, we would like you to rate your experience today. How would you rate the**

**a. The event as a way for WMATA to hear the opinions of the public**

☐ Poor ☐ Fair ☐ Good ☐ Excellent

**b. Usefulness of the information presented at this event**

☐ Poor ☐ Fair ☐ Good ☐ Excellent

**c. Time of day the event was held**

☐ Poor ☐ Fair ☐ Good ☐ Excellent

**d. Ease of getting to the location where the event was held**

☐ Poor ☐ Fair ☐ Good ☐ Excellent

**e. Accessibility of this location for those with physical impairments**

☐ Poor ☐ Fair ☐ Good ☐ Excellent

**f. What, if anything, can WMATA do to improve future events like this?**

---

**2. Did you require non-English speaking assistance today?**

☐ No ☐ Yes → Was someone available who spoke your primary language?  
☐ No ☐ Yes

**3. If English is not your first language, what is the language you speak most often at home?**

---



**4. If English is not your first language, how well do you speak English?**

- a. Very well
- b. Well
- c. Not well
- d. Not at all

**5. What is your race? (Check all that apply)**

<input type="checkbox"/> White	<input type="checkbox"/> Black or African American	<input type="checkbox"/> Hispanic or Latino
<input type="checkbox"/> Native American	<input type="checkbox"/> Asian	<input type="checkbox"/> Pacific Islander
<input type="checkbox"/> Two or more races	<input type="checkbox"/> Other, specify: _____	

**5. What is your annual income?**

- a. \$30,000 or above
- b. Below \$30,000

If you would like to be added to WMATA's email list to receive follow-up information regarding this project, **please provide your email below:**

---

**Figure 15 Sample Survey Add On Questions**

Answer all questions using the scale of 1 to 4. In this scale, 1 is poor, and 4 is excellent. A third option is "not applicable" (na):

1. How well did today's event work for you?:
  - Time of day (1-4)
  - Location (1-4)
  - Staff who speak my language (1-4 or N/A)
2. Did this event provide you with useful information? (1-4)
3. How satisfied are you with your opportunity to provide input today? (1-4)

### Public Participation Plan Implementation Performance Measures

Table 13 provides a framework for the proposed performance measures for WMATA's Public Participation Plan. The measures listed in Table 1 will be used to create the annual Performance Measurement Review. The report will aggregate Post-Project Evaluation Reports and use information from other sources, including the results of an annual CBO Survey, to create an annual evaluation report. The annual Performance Measurement report will provide context for percentage-based performance measures by including the types and number of public participation efforts conducted during the previous year.

WMATA's goal is to match the demographics of public outreach attendance to the demographics of the population it serves. For the first year the PPP is used, WMATA will note which events successfully matched project demographics, and create more specific Project and PPP Performance Measure attendance goals as needed as part of a larger Toolkit review at the end of that year.

**Table 13 Overall Public Participation Plan Implementation Performance Measures**

STRATEGY	ACTION	PERFORMANCE MEASURES, TARGETS AND SOURCES
<b>1. METHODS AND INFORMATION</b> <b>What steps did you take to reach the project populations (LEP, low-income, and minority groups)?</b>	Outreach events are physically accessible to participants.	1. [__%] of projects where all outreach events were held within 1/4 mile of Metrobus or Metrorail line ( <i>Source: Project Outreach Plan</i> ).
		2. [__%] of projects where all outreach events were held in ADA accessible locations ( <i>Source: Project Outreach Plan</i> ).
	Outreach event materials are accessible to LEP populations.	3. [__%] of projects all where outreach materials were translated into all key languages identified in Project Communications and Outreach Plan ( <i>Source: Post-Project Evaluation</i> ).
	Event information, including marketing and promotional materials, is accessible to participants.	4. [__%] of projects where all event advertisements and notices were placed in non-English language media ( <i>Source: Post-Project Evaluation</i> ).
<b>2. PARTICIPATION AND EVENT FEEDBACK</b> <b>Did participation rates match the</b>	Other than meetings designed for small groups, project outreach events should be well attended.	5. [__%] of projects where all outreach events met the attendance goal ( <i>Source: Post-Project Evaluation</i> ).

STRATEGY	ACTION	PERFORMANCE MEASURES, TARGETS AND SOURCES
<b>project demographics? Did the public and staff view the outreach as effective?</b>	LEP, minority, and low-income participation in outreach accurately reflects project population.	6. [__%] of projects where participation rates by minority, low-income, and LEP groups in project outreach met or exceeded the demographics of project populations ( <i>Source: Post-Project Evaluation</i> ).
	Outreach event participants had a positive experience and were satisfied with opportunities to provide input.	7. [__%] of projects with an average of “good” or higher rating from post-event comment cards or survey (Questions 1-3) ( <i>Source: Post-Project Evaluation</i> ). 8. [__%] of projects where public outreach activities received positive ratings from participating CBOs ( <i>Source: Annual CBO Survey</i> ).
	Key lessons learned from outreach process.	9. [__%] of projects where the project manager summarized key lessons learned for future outreach events ( <i>Source: Post-Project Evaluation</i> ).

STRATEGY	ACTION	PERFORMANCE MEASURES, TARGETS AND SOURCES
<b>3. FOLLOW-UP<sup>34</sup></b> <b>Provide a clear opportunity for all public outreach participants to receive follow-up information about the project, including event results and implementation.</b>	All event outreach participants are informed of event results, project results and implementation of project results.	10. [__%] of applicable projects where project managers summarized key recommendations from the public and explained why or why not the recommendations were implemented ( <i>Source: Post-Project Evaluation</i> ). 11. [__%] of applicable projects where recommendations and outcomes were communicated with outreach participants who provided an email address and CBOs who requested follow-up, providing the summarized key recommendations to the participants ( <i>Source: Post-Project Evaluation</i> ). 12. When applicable <sup>35</sup> , [__%] of projects that identified a process for maintaining contact with outreach participants and CBOs in the period between project planning and implementation ( <i>Source: Project Outreach Plan</i> ). 13. When applicable, [__%] of projects that identified a clear process for re-informing the public (including the key demographic groups from the project) when elements of the project are implemented ( <i>Source: Project Outreach Plan</i> ).

<sup>34</sup> As established in the PPP toolkit, the role of public outreach on some projects may simply be to “inform” the public and not to gather input specifically. In these cases, follow-up with the public may not be necessary. The project manager should consult with others on the project team to determine if this is the case for their project.

<sup>35</sup> In some cases, implementation may occur months or years after the project has been studied. In these cases, the project manager should set up a process to keep the public informed over time.



### Public Participation Toolkit Performance Measures

As outlined previously, Project Managers and the Office of External Relations will be responsible for creating Project Communications and Outreach Plans, Post-Event Summaries, and Post-Project Evaluations during the course of any project that includes an outreach element. Table 14, PPP Toolkit Performance Measures for Projects, includes the performance measures that will be gathered for each project. The Post-Project Evaluation form is designed to capture the information needed for these performance measures. The Post-Event Summaries and Post-Project Evaluations will be aggregated to support the Annual Performance Measurement Review discussed in the preceding section.

The Public Participation Toolkit in Chapter 5 provides guidelines for attendance levels by type of event. The guidelines were developed based on WMATA's experience with participation levels in the Public Participation Plan, as well as other recent large-scale public participation efforts (including the Silver Line Phase 1 Outreach and the *Love Your Bus Stop* outreach campaign). These guidelines will be used by project managers to create attendance targets for their events. These targets will then be used to track performance, using measure 6 shown in Table 13.

**Table 14 PPP Toolkit Performance Measures for Projects**

STRATEGY	ACTION	PERFORMANCE MEASURES, TARGETS AND SOURCES
<b>1. METHODS AND INFORMATION</b> <b>What steps did you take to reach the project populations (LEP, low-income, and minority groups)?</b>	Outreach events are physically accessible to participants.	1. [__%] of outreach events are within 1/4 mile of Metrobus or Metrorail line ( <i>Source: Project Outreach Plan</i> ). 2. [__%] of outreach events that are ADA accessible ( <i>Source: Post-Project Evaluation</i> ).
	Outreach event materials are accessible to LEP populations.	3. Were outreach materials translated into all key languages identified in Project Communications and Outreach Plan ? (Y/N) ( <i>Source: Post-Project Evaluation</i> ).
	Event information, including marketing and promotional materials, is accessible to participants.	4. [__%] of total event advertisements and notices that are placed in non-English language media ( <i>Source: Post-Project Evaluation</i> ). 5. [__%] of event advertisement materials developed at least three weeks before event ( <i>N/A for focus groups</i> ) ( <i>Source: Post-Project Evaluation</i> ).
	Other than meetings designed for small groups, project outreach events should be well attended.	6. [__%] of outreach events that meet the attendance goal for that type of event.
<b>2. PARTICIPATION AND EVENT FEEDBACK</b> <b>Did participation rates match the</b>		

STRATEGY	ACTION	PERFORMANCE MEASURES, TARGETS AND SOURCES
<b>project demographics? Did the public and staff view the outreach as effective?</b>	LEP, minority, and low-income participation in outreach accurately reflects project population.	7. Overall, did participation rates by minority, low-income and LEP groups in the outreach events meet or exceed the demographics of the project population? Calculate the percent difference for each event. <i>(Source: Post-Project Evaluation)</i> .
	Outreach event participants had a positive experience and were satisfied with opportunities to provide input.	8. Did outreach events receive an average of “good” or higher ratings from post-event comment card or survey for each project event? (Questions 1-3) (Y/N) <i>(Source: Post-Project Evaluation)</i> .
	Key lessons learned from outreach process.	9. Did the project manager summarize the key lessons learned for future outreach events? (Y/N) <i>(Source: Post-Project Evaluation)</i> .
<b>3. FOLLOW-UP Provide a clear opportunity for all public outreach participants to receive follow-up information about the project, including recommendations and plans for implementation.</b>	All event outreach participants are informed of event results, project results and implementation of project results.	10. If applicable, did the project manager summarize the key recommendations from the public and explain why or why not these can be implemented? (Y/N) <i>(Source: Post-Project Evaluation)</i> .
		11. Were these recommendations communicated back to outreach participants who provided an email address and CBOs who requested to stay in touch? (Y/N) <i>(Source: Post-Project Evaluation)</i> .
		12. If applicable, is there a process in place for keeping in touch with outreach participants and CBOs in the period between project planning and implementation? (Y/N) <i>(Source: Project Outreach Plan)</i> .
		13. Is there a clear process for re-informing the public (including the key demographic groups from the project) when elements of the project are implemented? (Y/N) <i>(Source: Project Outreach Plan)</i> .