



Passenger Education and Training

Educating the public about transit options (and more specifically, about how to make the most out of transit services) is an important step in improving any transit program. Informing the public about available services not only increases the potential that they will use the service, but often makes them more supportive of the services for others even if they choose not to use the service themselves. Additionally, ensuring that each potential passenger has the resources available to learn to use the transit system to the fullest is the best method of ensuring passenger satisfaction and steady ridership. Passenger training also allows the transit provider to encourage the use of services which are most efficiently provided, such as training a passenger to use fixed-route service rather than door-to-door service when it is appropriate. This chapter discusses the methods and benefits of educating the public about transit services, as well as methods for training the individual passengers to make the most out of available services.

PUBLIC EDUCATION/COMMUNITY OUTREACH

Educating the public about transit services is a benefit to the public as well as a useful form of marketing. The transit provider should take advantage of community events such as fairs or Earth Day celebrations to display vehicles, hand out brochures, and present the benefits of transit. Creating high visibility for the transit system makes transit a fixture of the community and can garner support. Additionally, attending public events is an opportunity for the transit provider to explain to the public what the transit system does and how it can be used.

In addition to attending public events, the transit administrator can visit service clubs, senior centers, and social service programs to teach the benefits of transit, how to use transit, and explain to program directors the benefit of having passengers use fixed-route service over paratransit if they are able.

Community Outreach Tips

Conducting community outreach activities is critical to increasing community understanding of, and support for, a transit system. When meeting with community members, be sure to:

- Inform them of what the system has recently done or is planning to do;
- Inform them when and where the activity will take place;
- Inform them of how the activity will affect the community; and
- Inform them who will benefit from/be affected by the activity.

Incorporating a management philosophy that places the customer first can lead to improved employee cohesion as well as increase courtesy and service to customers.

Education Program for Institutional Users of the Dial-A-Ride Service

One means of improving service quality of a dial-a-ride program is a program to educate institutional users (such as social service agencies and medical offices) with regard to the requirements and limitations of the dial-a-ride program. Specifically, institutions, passengers, and the program could benefit if greater knowledge is available regarding factors such as the following:

- The availability of capacity on the service at various times of the day. The ability of institutions to take advantage of relatively “slack” periods of the day in scheduling their passengers’ trips can reduce frustration with the service and can improve the overall productivity of service by providing more even demand for service.
- Reservation procedures and passenger eligibility. Providing “official” information regarding service policies will minimize the confusion generated by “word of mouth” information.
- The impact that last-minute changes in pickup times has on the system. A greater understanding of the program’s difficulty in rescheduling return trips from medical appointments, in particular, would encourage more timely completion of dial-a-ride passengers’ appointments.
- The costs associated with dial-a-ride service and the financial limitations of the program. This information would foster an improved understanding of the abilities and limitations of the program.

At a minimum, written information should be developed and distributed to major dial-a-ride trip destinations. Preferably, transit staff would make presentations to staff meetings and professional organizations.

PASSENGER TRAINING/TRAVEL TRAINING

Passenger training—also known as Travel Training—can take many forms, from familiar rider guides and brochures to individual training of Travel Ambassadors or buddies. The needs of specific market targets vary based on age and ability of the passenger, as described below.

Training Youth

Young people are a strong potential market for transit ridership. Children over the age of 10 are often independent enough to ride transit without an adult, and children 17 and under typically do not have a driver's license or a vehicle to drive. Furthermore, training youth to use transit can make them life-long transit riders as they become familiar and comfortable with the service.

There are a number of methods to train young people to use transit, depending on age. Grade-school children can be given coloring books with a transit theme. The children might also receive day passes for themselves and a parent so they can experience riding the bus together. The transit provider can also visit schools with a transit vehicle. Students would be encouraged to board the bus where they would be taught the basics of riding a bus by a transit representative, with the assistance of the bus driver and school teacher. The basics include ticket/fare information, rider etiquette and safety, how to request a stop, the significance of the voice annunciator, wheelchair lift, etc. This would be ideal for multiple classes at one time.

For older children, an on-site presentation might be the best training tool. Marketing staff would go into the classroom and lecture about transit services, the benefits of public transportation, and how to plan a trip using the Ride Guide and System Map. For teenagers, it is helpful to create a hip, fashionable presentation that would create “buzz” among students in grades 6 – 12. It is better to limit the amount of stand-up talking and place emphasis on a presentation that incor-

porates games, music, activity, and collaboration with peers. Students are likely to become bored with standard PowerPoint slides and information overload, so it is important to make the presentation lively and interactive.

Finally, encouraging school groups to take transit for field trips is a great way to teach them about the transit system. By using local bus service for school field trips, students learn important life skills. Transit staff would coordinate with teachers to organize group trips on the local routes, and provide the teachers with an itinerary and other information to help with the ride.

Instructions to group riders might include the following:

“These simple steps will help your trip go smoothly”

- Get to the bus stop at least five minutes before the bus is scheduled to arrive.
- Make sure your group is waiting in the “Safe Zone,” a safe distance from the curb and street.
- When the bus pulls up, confirm that it’s the bus you want to board by checking the sign above the windshield.
- Upon boarding, show the operator your Free Pass (for pre-paid or free trips) and tell him or her how many are in your group.
- If your group will not be using a pass, have the exact bus fares ready to deposit in the farebox. To expedite boarding, please arrange for one adult to deposit the fares for everyone in your group. If your group will be transferring to another bus, ask the operator for a group transfer when you deposit the fares.
- Assist your group in finding seats quickly. If you have to stand, hold onto the handrails.
- Encourage your group to observe good bus etiquette so all passengers can enjoy the ride.
- Watch for your bus stop and signal the operator a couple of blocks before you reach it.
- When possible, exit through the back doors, then move quickly into the “Safe Zone.”

Training the General Public

This broad category of riders needs a broad approach for training. Whether a person is an occasional rider using transit because of car maintenance, or someone

completely dependent on transit for mobility, the general public wants information which is easily available and simple to understand. Most small transit systems find the best methods of getting information to the public is through websites, brochures, and customer service phone lines. For first time transit users, the phone line is the most successful because the customer service employee can walk the customer through each step of planning his or her first trip, from scheduling to using fares, and explain where to wait for the bus. It may be advisable for the transit provider to obtain Trip Planner software to be better prepared for new customers who call in and have their trip developed without the need to read a schedule.

Passengers who are more familiar with the bus service may be more comfortable with a well-designed website to access rider information. A website should include the following information:

- A map of the route system (for complicated or detailed maps, a zoom feature is desirable).
- An easily readable schedule.
- Information on how to ride.
- Information on dial-a-ride services.
- A phone number for additional information.
- Information on fares.
- Information on loading/unloading bicycles.
- Links to regional providers.

Brochures or rider guides should be readily available at super markets, libraries, government offices, community centers, schools, and on the bus. A well-designed brochure will include the following information and characteristics:

- Easy to read and attractive.
- A map of the routes.
- Schedule information.
- Fares.
- Contact information: phone number(s), address, website address, e-mail.
- How to load/unload bicycles.
- Transit policies (regarding food, music, etc.).

Finally, it may be appropriate to give training sessions at social clubs such as the Lions, Elks, and Rotary.

Training Passengers with Special Needs

Passengers with disabilities will have varying needs depending on the type of disability. Whether a disability is physical or mental, the foremost concern in training passengers with special needs is developing the appropriate communication. New passengers with disabilities should be assisted one-on-one by a person with similar disabilities, if possible. Independent living centers and programs conducted by persons with disabilities provide the best training

Training People with Disabilities

Easter Seals Project ACTION offers a five-step training curriculum in *Training People with Disabilities to Access Public Transportation*. The steps are:

- Referral
- Assessment
- Program planning
- Training
- Evaluation and follow-up

The referral steps include a press release and brochure distributed to various agencies that provide services for persons with disabilities in the communities. In the second step, the potential user's cognitive abilities, general awareness, physical skills, interpersonal skills, and safety are assessed. From this checklist an individual program is planned (step three). The program plan identifies goals and objectives and is flexible so that either the trainer or the new user may revise the goals and objectives.

In addition to this training program, it is important to have passenger information available in Braille and on tape for passengers with visual disabilities.

Travel Training for Seniors

Travel training programs have become a popular way for transit systems to reach out to older passengers. Travel training programs are intended to acquaint older

persons with the transit system, showing them how easy it is to board the bus and ride to their destination. In many cases, a travel training program involves “class-room” time in which they learn about transit options, and “field” time in which the seniors try out riding the bus. Sometimes the transit system will park a bus at a senior center or senior facility and invite the residents to board the vehicle and try out the seating. There may also be a seminar on reading maps and schedules or a discussion of bus pass options and discounts. The most successful travel training programs take it a step further, showing the trainees that transit can be a gateway to independence and recreation.

Some Successful Travel Training Techniques

Travel Buddies – Some travel training programs encourage the participating seniors to find “travel buddies” in their group. These travel buddies will accompany each other on trips and outings, looking out for one another. The buddy system serves several purposes—it dramatically increases the comfort level for both participants, it increases the safety level for both participants, and it makes the bus trip into a social outing.

Seniors Choose the Destination – Both Great Falls Transit District (GFTD) in Montana and LIFT in San Diego report that allowing travel training participants to choose the destination for a “training trip” is a very successful selling point. Many times, the elderly participants will be surprised to find out that a bus can get them where they need to go. Additionally, it is exciting for the seniors to choose a destination which makes the training experience less strenuous and tense.

Group Leaders – An enhancement to the travel buddy system is to assign a group leader to each group of seniors that undergoes travel training. The group leader is a senior who rides transit regularly and is familiar with the system. When a group of seniors takes their first trip in the travel training process, the group leader will ride along with them to answer their questions and concerns. The leader also provides an example for the seniors, demonstrating things such as how to ask for a seat, when one should stand up to exit, and the proper way to pay the fare.

Peer Training–Travel Ambassador – In some areas, senior volunteers are employed as “travel ambassadors” to assist with travel training programs. In exchange for a year of free transit service, volunteer travel ambassadors work one-on-one with other seniors as peer trainers. Travel ambassadors assist trainees with their trip planning, answer their questions and concerns, and accompany them on the bus. Travel ambassadors often must complete a specified training session and commit to a certain amount of training service.

Follow-Up– Follow-up calls to each of the seniors participating in a travel training program are said to be important. These calls are generally made three and six months after the completion of the program. The purpose of the calls is twofold: (1) to ensure that the seniors are comfortable with riding on the system and (2) to evaluate the success of the travel training efforts.

Case Studies of Travel Training Programs

Travel Training for Older Persons at the Fort Worth Transit Authority

Customers who do not qualify for complementary paratransit service may be able to use fixed-route service for some trips. Even customers who use complementary paratransit service may be able to use fixed-route service for some trips that they currently make on paratransit service. Two elements are key in successfully encouraging customers to make the change: (1) a price incentive and (2) effective training in how to use unfamiliar, fixed-route service. The Fort Worth Transit Authority offers travel training to older persons and others to learn how to effectively use fixed-route bus service. The program began in 1994 with a grant from the Federal Transit Administration. The objective was to train customers to switch from using complementary paratransit to using fixed-route service. Since its introduction, program eligibility has been expanded to include older persons and refugees. Some older persons sign up for training because they would rather learn how to use fixed-route service than use complementary paratransit service.

Training focuses on the following:

- Conducting an initial visit with the trainee to establish familiarity and assess personal travel capabilities;
- Executing a travel training agreement that establishes trainer and trainee responsibilities;

- Taking the client on a planned trip and conducting training during the trip;
- Repeating planned trips as required to establish confidence in independent travel;
- Conducting telephone follow-up to understand and resolve concerns; and
- Observing travel without the knowledge of the client.

Whenever changes are made to routing and scheduling that may affect a client, refresher training is provided to maintain knowledge and confidence. Trainers and trainees have separate and distinct responsibilities:

THE TRAINER

- Travels with the client during the training program;
- Learns required bus routes to and from specified places of travel;
- Assists the client in understanding and correctly assuming the responsibilities of independent bus travel;
- Facilitates the client's learning in an atmosphere that promotes confidence, skills, safety, and problem-solving abilities;
- Identifies actual/potential problems and works with the client and significant others to resolve them;
- Maintains a good working relationship with the client; and
- Keeps an accurate written log of training time with a client and significant events during training.

THE TRAINEE

- Works cooperatively with the trainer to learn to travel independently;
- Accepts supervision and agrees to work to solve any problems that may arise; and
- Abides by policies, procedures, and regulations.

The Fort Worth Transit Authority has estimated the number of trips made by people who have received travel training. In the period between 1994 (when the program was started) and 1996, approximately 25,000 to 32,000 trips were made annually. In recent years, trips have increased to between 55,000 and 70,000 per year.

Travel Training in Eugene, Oregon

One of the really successful components of the Driving Decisions for Seniors (DDS) program in Eugene, Oregon was the Bus Excursion Program in which seniors trained other seniors on how to use the county transit system. One participant said, “Nobody except another senior seems to understand what it takes to get us interested [in taking the bus].” The transit system was presented to DDS participants as a highly complex technical system. Thus, those older persons who successfully navigated the system were encouraged to give themselves credit for having the skill to master a complex system. The purpose of this presentation was to “turn bus riding from a low-status act into a high status one” (Heckman and Duke, 1997). A senior volunteer who was familiar with the local transit service took other seniors on “bus excursions” to restaurants or picnic spots within walking distance of bus stops. The bus excursion leader instructed the participants on planning the trip, boarding the bus, making transfers, and enjoying the trip. Of the DDS participants studied by Heckman and Duke, 64 percent (14 out of 22) of those seniors who voluntarily surrendered their driver’s licenses did so after participating in the Bus Excursion Program. The Bus Excursion Program was described as “important, if not pivotal, in their decision to quit driving.”

Part of the success of this program was the transit system’s support and attitude. The seniors saw that they were being treated with respect and that by understanding the service, they could make it responsive to their individual needs. DDS thus successfully overcame the common perception that many older persons “detest the bus because of what it means: one more ‘demerit’ toward a demotion in social status that accompanies aging in our society....[In contrast,] the Bus Excursion ‘honors’ bus riding by promoting intelligent transit system use as an achievement of high skill” (Heckman and Duke, 1997). One DDS participant said, “I used to think that riding the bus was so undignified...I just didn’t know any better...It sure has made my life easier” (Heckman and Duke, 1997). Harper and Schatz (1998) report more common images of transit, images that were confirmed in this project’s focus groups for older persons: “A few seniors viewed public transportation as an option reserved only for the lower socioeconomic classes, and most viewed it as an inconvenient option” (Harper and Schatz, 1998). Some social marketing may be needed to convince seniors and others that travel by means other

than driving or riding in an automobile has real value. Public transit is often seen as an “inferior economic good,” a service for low-income and disadvantaged people including the foreign-born, foreign language-speaking, worker class. More people could be attracted to public transportation services if these services adopted a greater customer focus, a more user-friendly attitude, and began to cater to riders who ride by choice, not because they have no other choice. Travel training on how to use public transit services can be a key marketing element. The travel training program was a very successful component of the DDS program in Oregon. Travel training programs have been extremely effective in increasing the usage of public transit services among people with disabilities, including individuals in mental retardation and developmental disabilities programs.

Passenger Training in Edinburgh, Scotland

Edinburgh is in the process of evaluating a passenger training program called “Elfbus.” The aim of the program is to assist people with disabilities in trying out new wheelchair-accessible, low-floor buses so that they can gain experience in the short term, and they can gain confidence in using buses independently in the long term. Volunteers are being provided to accompany people with disabilities on bus journeys from their homes and back again. In the first stages, the program will be piloted by wheelchair users who are relatively confident in getting around. Lessons from the pilot trial will then be assessed before considering whether the project can be extended to other people with disabilities. The responsibilities of the participants have been defined as listed below. The whole program is a partnership among the participants listed.

RESPONSIBILITIES OF THE LOCAL GOVERNMENT (THE COUNCIL)

- Provide a loan to the voluntary organization to cover reasonable expenses incurred in delivering the project including administration fees agreed to between the Council and the voluntary organization;
- Provide monitoring forms for use by the volunteers;
- Write to the bus operators to ensure that the company is aware of the project; and
- Nominate a contact officer for liaison with the voluntary organizations.

RESPONSIBILITIES OF THE VOLUNTARY ORGANIZATION

- Ensure that volunteers are insured, trained, and briefed appropriately for their task;
- Match the volunteer and the rider;
- Maintain the confidentiality of the rider;
- Reimburse volunteers for expenses incurred in accordance with usual arrangements;
- Keep a record of each journey made for monitoring purposes and make this available to the Council;
- Account for the use of loans supplied by the Council at least quarterly;
- Nominate a contact officer for liaison with the Council; and
- Make contact with the bus rider (normally by telephone) in order to arrange a mutually convenient time for journeys.

THE ROLE OF THE VOLUNTEER

- Provide reasonable physical assistance to the rider, such as pushing a wheelchair user and helping them to maneuver onto, inside, and off the bus. The type of assistance will be agreed in general terms between the user and the volunteer before the first test journey;
- Have funds available to enable bus fares to be paid (for both the volunteer and the user);
- Pay for taxi fares if necessary to complete the journey;
- Make sure that the rider gets home again after the journey;
- Complete a monitoring form for each journey to record any lessons or problems encountered along with user perceptions of the journey; and
- Claim expenses from the voluntary organization, and keep regular receipts and records.

RESPONSIBILITY OF THE RIDER

- Notify volunteers of any difficulty in maintaining an appointment and give as much notice as possible in the event of a need to cancel a journey;
- Advise the volunteer of the extent of assistance, if any, anticipated during the journey;
- Attempt to undertake all aspects of the bus journey (boarding, paying fare, taking tickets, etc.); and
- Assist with the completion of a monitoring form in order to record observations and comments on each journey.

RESPONSIBILITIES OF THE BUS COMPANY

- Ask drivers to provide assistance to disabled passengers by:

- Bringing the bus close to the curb; and
- Using the ramps and lowering suspension if needed.

CONCLUSION

Addressing the travel preferences of the older persons of today might be the most important strategy in meeting the travel needs of older persons in the future. The travel attributes most highly valued by older persons describe transportation services that are reliable, frequent, door-to-door, low cost, comfortable, and spontaneous, and that serve a large variety of destinations over extended periods of time. This summarizes actions that transit operators can take regarding reliability, flexibility, and comfort.