

LANE TRANSIT DISTRICT  
COMMUNITY STEERING COUNCIL (CSC)  
MEETING NO. 5  
Wednesday, November 29, 2023  
5:30pm-7:30pm

LTD Board Room  
3500 E. 17<sup>th</sup> Avenue  
Eugene, OR

**PREMEETING PACKET**

- I. Agenda
- II. Memo on Co-Creation
- III. Example – TriMet Public Involvement Framework
- IV. Example – MBTA Public Engagement Plan

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**AGENDA**

- |        |   |
|--------|---|
| 5:30pm | <b>Welcome &amp; Housekeeping</b>   |
| 5:35pm | <b>Check-in on CSC's Purpose &amp; Charge: How Are We Doing?</b>                              |
| 5:55pm | <b>Co-Creation in Practice: Thinking Through Challenges, Solutions, and Prioritization</b>    |
|        | Exercise on Planning to Implementation Over 3 Phases<br>Large Group & Small Group Discussions |
| 7:20pm | <b>Recap of Discussion</b>  |
| 7:30pm | <b>Adjourn</b>  |



## AGENDA ITEM SUMMARY

**Tgb DATE OF MEETING:** February 1, 2023

**ITEM TITLE:** COMMUNITY ENGAGEMENT AND CO-CREATION

**PREPARED BY:** Tom Schwetz, Director of Planning and Development

**DIRECTOR:** Joe McCormack, Chief Development Officer

**ACTION REQUESTED:** Information and Discussion

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**PURPOSE:** To provide the board with background information on the process of co-creation as an integral part of successful community engagement.

**DESCRIPTION:** The process of co-creating LTD's future with the community is tied directly to LTD's mission of Connecting Our Community. In working toward LTD's vision for creating a more connected, sustainable, and equitable community, the co-creating process draws on all of our values; particularly with respect, integrity, equity, and collaboration.

At the board's December 7, 2022, work session, staff provided an overview of the Community Outreach and Communication Assessment project. The focus of that effort will be to create a framework for future community outreach that is fully informed by broad stakeholder input that can be scaled to meet the needs of both LTD's projects (Strategic Business Plan, Comprehensive Operations Analysis, etc.) and ongoing processes (Budget, Community Investment Program, etc.). A foundational part of this framework will be an approach to engagement called "co-creation".

**BACKGROUND:** Co-Creation is a concept that was pursued in the private sector starting in the mid-1990's. It began as an approach to engage customers in product development. For example, Lego invited consumers to create designs of toy robots and construction models in that time. Since that time many private-sector firms (Cisco, Dell, Procter & Gamble, Sony, Starbucks, etc.) have successfully used the process of "customer co-creation". One of the fundamental lessons on co-creating learned in the private sector has been that "ultimately, becoming a co-creative enterprise is not just about "thinking outside the box," but about "transforming the box."

In the public sector, co-creation has been increasingly seen as an approach that can be used by public agencies to more meaningfully engage the communities they serve. King County in Washington is in the process of instituting the practice of community co-creation in its efforts to improve the equity and social justice outcomes of their services. One of the County's key findings has been that its traditional approach to community engagement has lacked process equity in the past. In that context, they have determined that, "Intentional and meaningful community engagement and co-creation are foundational to being pro-equity." They define co-creation as follows:

"Co-creation involves engaging with community members on strategy at the earliest possible moment. We rely on their experience and expertise to identify and frame problems. Residents inform work plans and policies to create solutions."

Attachment 1 provides King County's description of community engagement and co-creation. It provides a useful context for understanding how co-creation fits into overall community engagement. A presentation will be provided to facilitate the board's discussion on this topic in further detail.

**CONSIDERATIONS:** N/A

**ALTERNATIVES:** N/A

**NEXT STEPS:** N/A

**SUPPORTING DOCUMENTATION:**

- 1) Attachment 1: King County Co-Creation Description

**PROPOSED MOTION: NA**

## Attachment 1: King County Co-Creation Description

<https://kingcounty.gov/elected/executive/equity-social-justice/community-engagement.aspx>

# Community Engagement and Co-Creation

## Community Engagement

**Community engagement should be culturally relevant.** We use communication tools, time, space, and relationships to inform people. Residents give their input and participation in projects, processes, and programs. People connect by geography, interests, or likeness. They come together to address issues affecting the collective wellbeing.

## Co-Creation

**Co-creation is a mindset and approach.** It's about working together with the community to tackle specific challenges. Co-creation uses an active and ongoing participatory process. It assumes shared power, responsibility, accountability, and decision-making with community members. We center on those most harmed by inequality.

Co-creation involves engaging with community members on strategy at the earliest possible moment. We rely on their experience and expertise to identify and frame problems. Residents inform work plans and policies to create solutions.

## What's the Difference?

With engagement, the community's influence is often limited. The public is not involved in the initial stages and planning. They have a role later in the process.

*All co-creation involves community engagement. But not all community engagement is co-creation.*

With co-creation, the community is a thought partner from the beginning of a process. They guide our initiatives, goals, methods, and analyses. This creates accountability for all to stay on track with our shared goals.



## TriMet Public Engagement and Outreach Framework May 2019

### Purpose

TriMet recognizes that diverse values and opinions held both individually and as a group contribute to the quality of community life throughout the region. TriMet is committed to engaging the community it serves to ensure diverse public input and equity are part of its transparent policy and decision-making processes.

The general TriMet approach is to engage in a pro-active manner with diverse stakeholders via early, ongoing and meaningful communications. The public engagement process strives to include *all* interested and affected stakeholders – riders, members of vulnerable populations, members of diverse communities, elected officials, civic and business organizations, residents, and property owners to ensure they are provided opportunities for meaningful input.

In proposing any service changes, particularly changes that may result in diminished service, TriMet uses a variety of methods to communicate proposed changes and solicit feedback from the community. TriMet also engages in extensive community outreach in conjunction with large-scale projects to ensure that affected residences and businesses are fully informed of the impacts and benefits and are provided an opportunity for input in planning and implementation. On routes where there are a significant number of limited English proficient riders, TriMet staff will translate materials to ensure those riders can participate. After receiving public input, TriMet will determine whether to continue a service in its current form, change the service, or eliminate the service. Special attention is paid to the identification of any transit-dependent persons potentially affected by a route or service change.

Consistent with the requirements of Title VI, TriMet staff use GIS mapping software.

- Maps are created to identify affected low income, minority, and limited English proficient communities.
- Analysis is shared with TriMet staff working with affected communities to develop strategies to engage minority, low income and LEP populations, and to ensure proposed service changes are in compliance with the requirements of Title VI.

### TriMet Demographic Profile

**Low-income:** TriMet defines low-income persons as someone whose household income is at or below 150% of the federal poverty level. Based on 2012-2016 US Census American Community Survey five-year estimates, 21.6 percent of the population within TriMet's service district are low-income under this definition.

According to the 2012-2016 ACS, 29 percent of the population within TriMet's service district is considered minority. This includes Hispanic or Latino (12.4 percent), Asian (7.5 percent), Black (3.4 percent), American Indian/Alaskan Native (.5 percent), Native Hawaiian/Pacific Islander (.5 percent), and Other Mixed Race (4.2 percent).

TriMet defines LEP by respondent's indication on the Census that they speak English "less than very well."

The US Census Bureau collects data about the ability to speak English as well as the language spoken at home via the American Community Survey (ACS) and allows for the identification of LEP languages falling within the “Safe Harbor” thresholds. The thresholds are 5 percent of total population or 1,000 individuals, whichever is less.

This data below was retrieved for the three-county region (Clackamas, Multnomah, and Washington counties) in which TriMet provides service.

<b>Languages Spoken at Home</b>	<b>LEP Population Estimate</b>	<b>% of Total Population</b>	<b>% of LEP Population</b>
Spanish	56,605	3.8%	46.1%
Vietnamese	13,598	0.9%	11.1%
Chinese (Cantonese, Mandarin)	9,892	0.7%	8.1%
Russian	6,656	0.5%	5.4%
Korean	3,259	0.2%	2.7%
Ukrainian	2,948	0.2%	2.4%
Arabic	2,336	0.2%	1.9%
Tagalog	2,095	0.1%	1.7%
Japanese	1,867	0.1%	1.5%
Mon-Khmer, Cambodian	1,658	0.1%	1.3%
Persian	1,159	0.1%	0.9%
Other (e.g., Romanian & Somali)	20,799	0.1%	16.9%
<b>Total</b>	<b>122,872</b>	<b>8.3%</b>	

*Sources: TriMet GIS, Metro Regional Land Information System, and US Census American Community Survey Tables: 2012 - 2016 (5-Year Estimates).*

## Public Engagement Process

TriMet's public engagement process is based on nationally-established public participation core values:

1. Public participation is based on the belief that those who are affected by a decision have a right to be involved in the decision-making process.
2. Public participation includes the promise that the public's contribution will influence the decision.
3. Public participation promotes sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision makers.
4. Public participation seeks out and facilitates the involvement of those potentially affected by or interested in a decision.
5. Public participation seeks input from participants in designing how they participate.
6. Public participation provides participants with the information they need to participate in a meaningful way.
7. Public participation communicates to participants how their input affected the decision.

### A TriMet public engagement plan must include 12 critical elements:

A public engagement plan is required for any significant agency change as well as future planning objectives. Changes include those relating to fares, fare policy, service and capital projects.

A TriMet public engagement plan must include 12 critical elements:

1. Clearly defined purpose and objectives for initiating public dialogue. Shared understanding of the level and type of participation the plan is designed to generate.
2. Clear messages.
3. Specific identification of the potentially-affected public and other stakeholder groups.
  - a. Special effort placed on reaching underserved populations. These may be hard-to-reach groups such as low-income individuals, transit-dependent riders or members of minority communities. Strategies to reach will include going to where people live, work, go to school, practice faith, or shop; and providing culturally-competent materials.
4. Identification of possible barriers to participation among targeted populations and strategies to reduce these barriers.
5. Language needs identified to ensure participation of Limited English Proficiency (LEP) persons.
6. Use four-factor analysis to ensure access for LEP persons:
  - i. number or proportion of LEP persons eligible to be served or likely to be encountered by a program, activity or service;
  - ii. frequency with which LEP individuals come in contact with the program or service;
  - iii. nature and importance of the proposed changes to people's lives; and
  - iv. resources available to the recipient and costs.

7. Identification of engagement strategies and tactics.
8. Education/ information that results in accurate and full public understanding of options (as appropriate) and related issues.
9. Reflection of brand.
10. Info-gathering process outline.
11. Timeline and staff accountabilities.
12. Documentation process.

Before each plan is developed, the following levels of participation are reviewed to ensure clarity on what the agency is seeking. These levels and actions are based on best practices adapted from the International Association for Public Participation.

<b>Possible Level of Participation from Stakeholders</b>			
<b>Inform</b> Provide the stakeholder with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	<b>Consult</b> Obtain stakeholder feedback on analysis, alternatives and/or decisions	<b>Involve</b> Work directly with the stakeholder throughout the process to ensure that stakeholder concerns and aspirations are consistently understood and considered.	<b>Collaborate</b> Partner with the stakeholder in each aspect of the decision including the development of alternatives and the identification of the preferred solution.

<b>Corresponding Commitment</b>			
<b>Inform</b> We will keep you informed	<b>Consult</b> We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how stakeholder input influenced the decision.	<b>Involve</b> We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how stakeholder input influenced the decision.	<b>Collaborate</b> We will look to you for advice in formulating solutions and include your advice and recommendations in the decisions to the maximum extent possible.

## Public Participation Implementation

### Strategies

This section will lay the framework for the public participation strategies to be used in fulfilling the project goals. This will include strategies for:

- Communication and raising awareness about the project.
- Education and discussion about the project and key community issues that could arise with the project.
- Gathering input about what people like and value, as well as what concerns them with the project.
- Gathering input on broader topics of concern related to the project.
- Deliberate possible approaches and changes that are appropriate to achieve the overall goal of the project.

### Methods

Methods used to implement the engagement strategies will be designed to integrate the guiding principles of engagement. Potential methods include:

- Interviews to understand perceptions and attitudes for effective messaging and communication.
- Stakeholder interviews to understand detailed issues, concerns with, and possible approaches to reflect in the service changes.
- Listening sessions with the general public to understand likes and concerns about specific places and gather feedback on the public engagement plan.
- Small-group meetings with existing and new stakeholder groups to gather input on what they value and are concerned about on both specific places and related to the project itself
- Educational open houses to foster more in-depth learning and discussion.
- Booths and presentations at neighborhood and community events and presentations at existing meetings of community organizations

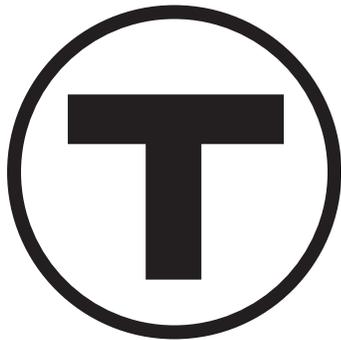
### Tools and Platforms

Specific tools and platforms will be necessary to offer several ways to submit stakeholder feedback. These tools will be used to inform and engage the community about the project, which include:

- Website, including online engagement platform, surveys, etc.
- Social media (Facebook, Twitter, YouTube, Instagram, and others)
- Traditional media, including news releases, press conferences, media interviews and public service announcements
- Email and service alerts
- Traditional advertising in digital and print publications

### Documenting Input and Improving the Process

The final section of the Plan will include the approaches that will be used to gather and document input provided by the public and the methods to help foster a two-way conversation in which questions are answered in a timely, transparent and informed fashion. Also included in this section will be the mechanisms for continually learning from what's working and what needs improvement in the public engagement process. It will include documentation methods for gathering quantitative and qualitative data about participation and strategies for process improvement. This information will be gathered by outreach staff and compiled in CiviCRM.



# MBTA Public Engagement Plan

Massachusetts Bay Transportation Authority

# MBTA Public Engagement Plan

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Updated in April 2023

# Executive Summary

The Massachusetts Bay Transportation Authority (MBTA)<sup>1</sup> believes that engaging the public in the development and improvement of transit infrastructure and planning is critical to responding to the evolving needs of the Commonwealth. We have developed a Public Engagement Plan (PEP or Plan) to detail our commitment to meeting these evolving needs, as well as ensuring the civil rights<sup>2</sup> of members of the public to participate in and influence transportation decisions through accessible and inclusive engagement strategies.



Community Meeting at La Colaborativa on the Service and Fare Change Equity Policy and Updated Public Engagement Plan, 2023

The PEP outlines why engaging the public is important; the principles for how we will reach out to the public; our goals for responsible and thoughtful outreach; the methods and types of community and public events; and our efforts to ensure accommodations so that all may participate. The PEP, at a high level, seeks to explain which kinds of processes, projects, and decisions the public may influence through their engagement and our responsibility in these processes.<sup>3</sup>

Going back decades, certain populations' interests have been underrepresented and not prioritized in decision-making processes. This PEP represents our proactive course correction to that historical reality. We wish to hear from historically disadvantaged populations, including but not limited to: populations protected on

1 MBTA public website is available at: [www.mbta.com](http://www.mbta.com)

2 The Federal Transit Authority has issued guidance on inclusive public participation, available at FTA Circular 4702.1B, Title VI Requirements and Guidelines for Federal Transit Administration Recipients, at Chapter 3-5.

3 In addition, we seek to align our practices with the Boston Region Metropolitan Planning Organization's "Public Participation Plan" revised in 2019, which can be found [here](#).

the basis of race or ethnicity<sup>4</sup>, low-income<sup>5</sup>, elderly, disability, veteran, and LGBTQ+ communities, the Limited English Proficiency population, and non-US-citizens.

The MBTA is committed to developing policies and procedures to achieve the goals and principles outlined in this PEP. We look forward to the public's continued participation in transit development from planning, design, and construction, to service planning and policy.



Community Meeting at La Colaborativa in Chelsea on the Service and Fare Change Equity Policy and Updated Public Engagement Plan, 2023

## Background on the MBTA

The MBTA is the country's 5th-largest transit agency and the largest transit system in Massachusetts. The MBTA is responsible for multi-modal transit operations within Greater Boston, including the provision of commuter rail service that extends into 170 communities. The MBTA is a public entity and is overseen and funded in part by the Commonwealth of Massachusetts and cities and towns in its service area.

The legislature established an MBTA Board of Directors<sup>6</sup> to bring oversight, support, and fiscal accountability to the Authority. The Board consists of seven members, including the Secretary of Transportation and one member with municipal government experience. The remaining members are appointed by the Governor and include a rider and resident of an environmental justice population, and a per-

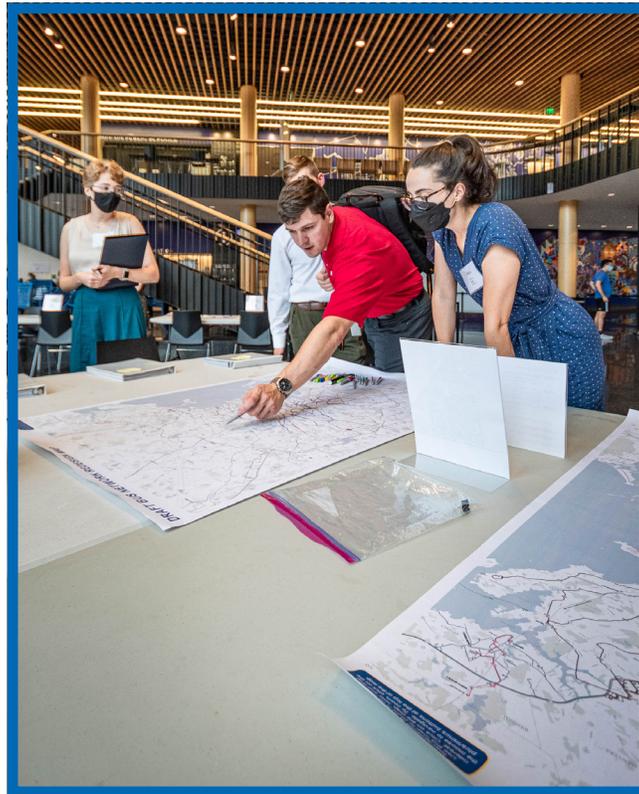
4 FTA Circular 4702.1B provides that any individual who identifies as belonging in any one or more of the following US census categories is a member of a population that is protected from discrimination on the basis of race and/or ethnicity: American Indian and Alaska Native; Asian; Black or African American; Hispanic or Latino (of any race); Native Hawaiian or Other Pacific Islander.

5 The MBTA defines low-income populations as those in which the median household income is less than 80% of the median household income for the MBTA service area (approximately \$82,000 in 2023 and subject to annual modification).

6 For more information on the MBTA's Board of Directors, visit: [www.mbta.com/leadership/mbta-board-directors](http://www.mbta.com/leadership/mbta-board-directors)

son recommended by the President of the AFL-CIO.

The MBTA's General Manager, Deputy General Manager, and Chief Administrative Officer report regularly to the Board on the current state of the system performance, operation, finances, and Authority initiatives. In addition, the public is invited to comment on topics on the agenda at Board meetings.



Bus Network Redesign Open House, 2022

## Public Engagement at the MBTA

The MBTA has developed this Plan to provide a baseline for holding inclusive, accessible, and responsive public meetings, hearings, and other forms of participation for transportation decision-making, in accordance with state and federal law. This Plan will be updated on a regular basis to incorporate improvements to public engagement at the Authority. It is a step toward outlining and communicating our goals and priorities for the public.

This Plan presupposes a desire to have early, continuous, and meaningful opportunities for the public to help identify social, economic, and environmental impacts of proposed transit policies, projects, and initiatives. It has been written to ensure that sufficient consideration of, outreach to, and inclusion of underserved or histor-

ically marginalized communities are incorporated into the MBTA's public engagement procedures. Adherences to these principles will ensure broad compliance with nondiscrimination obligations,<sup>7</sup> which expand protections for some groups against discrimination based on, for example, sexual orientation and veteran status.

As a public entity serving the needs of the public, the MBTA has a responsibility to be transparent about decisions that impact the public, create multiple channels through which members of the public can provide input, and weigh this input as part of its decision-making process. The MBTA recognizes that this input can lead to the delivery of service and projects that align with the interests of the riding public – a benefit for the Authority and riders in the long-run – which is why this Plan emphasizes hearing from a variety of rider views and different communities within the MBTA service area when making decisions.



Quincy Center, Thomas Library, Community Meeting 2019

The Plan focuses on four main types of decisions that the MBTA makes that impact the public: service, fares, capital budget and projects, and policies. Most decisions include multiple components and sometimes conflicting input and opinions. In addition to public input, the MBTA must consider technical expertise and feasibility, funding availability, legal authority and jurisdiction, and balancing the needs of many stakeholders. However, public interest and public input are at the forefront of these decisions.

The MBTA is required to follow federal nondiscrimination obligations through Title VI of the Civil Rights Act of 1964, Sections 504 and 508 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act. The MBTA will not discriminate

<sup>7</sup> Obligations set at the state level mandate considerations that go beyond federal protections to include ethnicity, sexual orientation, gender identity or expression, religion, creed, ancestry, and veteran's status (including Vietnam-era veterans).



Bus Network Redesign Open House, Columbus Ave, 2022

on the basis of race, color, national origin (including limited English proficiency), or disability. Moreover, state and federal law bar discrimination the basis of age, sex, and sexual orientation. In addition, the MBTA has redoubled its commitments to accessibility for persons with disabilities. In accordance with the 2018 Amended Settlement Agreement *Daniels-Finegold et al vs. MBTA*,<sup>8</sup> the MBTA is committed to ensuring any proposed service changes include specific outreach to persons with disabilities.

## Guiding Principles for Public Engagement

Prior to final decision-making, project development processes need to offer the public opportunities to participate in discussions to describe their needs and offer opinions. The MBTA has the following public engagement principles that agency representatives and those working in concert with the MBTA on transportation projects and initiatives will strive to achieve:

- **Strong Community Partnerships:** The MBTA shall develop collaborative working partnerships with community members, community and advocacy organizations, and municipalities to build trust, avenues for regular communication, and ongoing engagement.

8 For more on this history, visit: [www.mbta.com/accessibility/history](http://www.mbta.com/accessibility/history)

- **Strategic and Continuous Outreach:** Concerted effort must be given to encouraging participation through early, accessible, and ongoing strategic outreach to the public we serve. This includes using a variety of tools and mechanisms to reach the riders who are most likely to be impacted by proposed changes.
- **Accessibility, Equity, and Inclusion:** All public participation and engagement activities should promote inclusion and equity with specific strategies that encourage participation from diverse members of the community. Every effort should be made to ensure that participation opportunities are physically, geographically, temporally, linguistically, and culturally accessible. Public engagement processes should include, as appropriate to a project or those impacted, a range of socioeconomic, ethnic, environmental, and cultural perspectives and include people with low-incomes, people of color, people with disabilities, people with limited English proficiency, young people and older adults, and other traditionally underserved communities.



Dudley Better Bus Meeting, 2022



MBTA KIPP Academy School Visit, 2023

- **Respectful and Solution-Oriented Dialogue:** The MBTA welcomes the constructive contributions by members of the public, and encourages the respect and inclusion of all points of view. When there are conflicting opinions, conversations should be structured to allow for compromise, when possible, while staying solution-focused to respond to community concerns.
- **Transparent Process:** The decision-making processes and level of input for any event or community process should be clear, open, and understandable. Plans and projects must be clearly described, including the potential effect of public input, so that the public understands what is being proposed and how to get involved.

## Responsible and Conscious Outreach

The MBTA should understand the full range of a community's needs in order to create responsive and innovative transportation plans, projects, and policies. This entails learning about the community from the community and understanding their relationship to transportation and the project in question. By consistently interacting with community members and leaders, the MBTA gains insight into the reasons why community members may agree or disagree with proposed plans or projects.

Historically, conventional outreach methods have missed populations protected on the basis of race or ethnicity and individuals in low-income communities, as well as those with low literacy and/or limited English proficiency. Outreach to tradition-

ally underserved groups helps ensure that all riders have opportunities to affect the MBTA's decision-making process. MBTA public outreach efforts must be designed to accommodate the needs of populations protected on the basis of race or ethnicity, low-income communities, persons with limited English proficiency, people with disabilities, and other traditionally underserved people throughout all phases of any public engagement process.

The MBTA recognizes that our most common outreach techniques are not always effective with these populations. The MBTA also has an obligation to conduct outreach to encourage attendance, particularly among groups protected by federal and state nondiscrimination laws. Ensuring that as many members of the public as possible are given a chance to participate in the discussion goes beyond selecting the right place, time, and location for a meeting.

To support creative public meeting planning, meetings should be tailored to effectively inform the community and/or the target audience on the subject matter to be addressed and to respond to their questions or concerns. From a civil rights perspective, effective public engagement requires knowing the target audience, including languages spoken, racial or cultural groups in the area, community organizations and leaders, and other key players. Ideally, organizers will go even further to learn about the community's transportation history, such as past issues and areas of concern.

Engagement tools outside of traditional public meetings should also be pursued as a mechanism for engaging diverse communities and are outlined in the following section.



In Person Public Meeting on the Proposed FY2024-2028 Capital Investment Plan, 2023

Strategic planning for the involvement of communities of color, low-income, disability, and other protected groups is essential to an inclusive and successful effort. Taking steps to overcome barriers to participation increases the representation of



AFC 2.0 Prototype Visit, 2019



South Boston Community Meeting, 2019

members of the public and the potential for a project to be fully embraced by the community. Engaging the public in a targeted context is complex, especially while ensuring diverse participation, yet this work is essential to meaningfully engage with the public.

## Community Events and Engagement

The MBTA will seek to engage the public about our policies, planning, and projects. The level of complexity for each project and the impact on the community will guide the structure and process of public engagement. Simple projects may require a less extensive engagement process, while some projects may require more outreach over the life of the project. Further, the MBTA recognizes that our riders have different time constraints and strives to provide multiple ways to ensure rider voices are heard.

The most common types of public engagement used by the MBTA are in-person and virtual public meetings, including public hearings, as well as community meetings, open houses, stakeholder meetings, and one-on-one interactions. The MBTA also deploys street outreach teams, intercept and periodic surveys, interviews or asking questions at stations or bus stops, and has increased virtual public involvement to meet riders where they are. See below for a description of the common

types of engagement.<sup>9</sup>

These engagement strategies vary by time of day and day of week to ensure broad access to multiple opportunities for input.

### **Public Meetings, including Public Hearings (in-person and virtual)**

Public meetings, both at the project level and more broadly, are an opportunity for members of the public to engage in the transportation decision-making process. During public meetings, MBTA staff should present information about the project, service or fare change, or policy update for individuals who may be less familiar with the context and answer questions.

Public hearings are a type of public meeting held with more formality and are often required by state or federal law. At a public hearing any community member has an opportunity to provide a formal public comment on the topic at hand. The MBTA records all comments in a written transcript.



MBTA Forest Hills Station Clean-Up, 2023

## Community Meetings

In addition to more formal types of public events hosted by the MBTA, there are also less formal opportunities when MBTA employees go into existing community spaces to seek public input, often through invitations from community members and/or organizations. This could take the form of attending or presenting at existing forums, attending community or neighborhood meetings, or attending local events or fairs. In these cases, rather than hope the community comes to our meetings, we seek to engage communities where they are and in familiar settings. These tools should be leveraged extensively to minimize the barriers involved with community engagement.



Immigrant Family Services Institute Job Fair, 2023



Dorchester Community Resource Fair, 2023

## Open Houses and Breakout Sessions

MBTA staff and consultants regularly interact with members of the public through open houses or breakout sessions. These are less formal than public meetings or hearings and provide members of the public an opportunity to view study documents or project design plans. In some cases, open house and breakout sessions occur prior to a public meeting so that the public can be well informed in advance of the meeting. MBTA staff and consultants are on hand at these meetings to discuss particular details with members of the public. While the interactions during these sessions are informal, critical issues are often raised. MBTA staff and consultants strive to address these issues accurately and effectively during these sessions. Further, conversations with the public are documented to inform study or project development.

## Stakeholder Meetings

The MBTA is committed to engaging diverse stakeholders, both internal and external to the organization, to elicit feedback on many complex projects. In some circumstances, it may be appropriate to develop a group of stakeholders that meet regularly throughout the project process to share their specialized knowledge. At

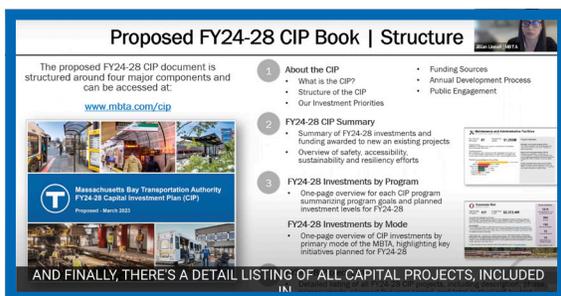
other times, it may be necessary to specifically target certain stakeholder groups. For example, a project manager overseeing the redevelopment of pedestrian pathways at a train station may benefit from specifically coordinating a meeting with disability stakeholders given the complexity and importance of that group’s unique perspective on the issue.<sup>10</sup> Including a diverse range of community leaders in conversations such as these is a useful strategy to solicit representative feedback. Stakeholders may include, but are not limited to, local shop owners, neighborhood associations, chambers of commerce, main streets organizations, municipal staff, and advocacy organizations.

### One-on-One Interactions

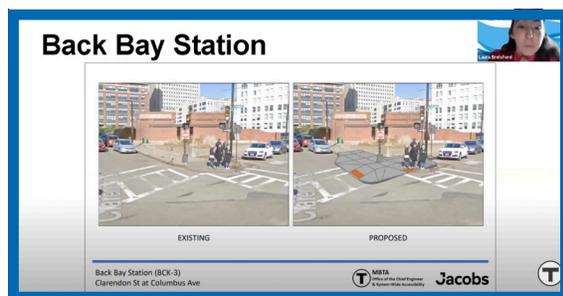
MBTA staff members interact directly with the public by virtue of the public facing programs, services, and activities we provide. These interactions can include planned meetings and spontaneous interactions with members of the public. In these instances, MBTA staff strive to engage the public on a more personal level, while maintaining similar access and inclusion provided in more formal methods of engagement. When possible, the MBTA makes it a purpose to report back on these discussions to help inform the work that we do.

### Virtual Public Engagement

During the COVID-19 pandemic, the MBTA’s public engagement opportunities were converted to virtual spaces to protect everyone’s health and safety. These virtual spaces include video conferences, webinars, websites, live stream, mobile applications, online surveys, and social media. While the MBTA is committed to



Virtual Public Meeting on the Proposed FY2024-2028 Capital Investment Plan, 2023



Riders’ Transportation Access Group - Virtual Advisory Meeting, 2023



Riders’ Transportation Access Group - Virtual Advisory Meeting, 2023

<sup>10</sup> One such customer engagement group is the Riders’ Transportation Access Group (R-TAG) which focuses on transportation matters that affect seniors and persons with disabilities. The group is the official advisory group to the MBTA on accessibility matters and is comprised of a nine-member Executive Board and general members.

in-person public engagement, virtual public engagement methods have proven to make participation more accessible and convenient for the public and staff alike and are a key public engagement strategy across the Authority.

The MBTA continually innovates and strives to utilize new communication and engagement tools to increase the number of public voices in important decisions. We want to ensure that we are reaching a diverse audience and providing a meaningful opportunity for members of the public to share feedback, while guaranteeing accessible formats for participation.

## **Accessibility and Public Engagement**

When planning, advertising, or hosting public meetings and/or engaging with the public, MBTA staff must be sure that everyone can fully participate, regardless of race and ethnicity, income, limited English proficiency, age, disability, or geography. This requires special consideration for meeting notices, promotion, and accommodations.

To ensure that members of the public are aware of outreach and engagement events, the MBTA strives to provide notice as early and broadly as possible. The MBTA aims to post notices (flyers, signage, or web pages) at least 14 days prior to a community event. While the 14-day notice is our goal, there are instances where this is not met due to the dynamic nature of transportation projects and when tradeoffs are made to immediately respond to public concerns. Notices should include information as to how the public may participate.

There are a number of avenues utilized by the MBTA in order to ensure broad outreach so the public may participate in community events. These outreach avenues include posted signs in public locations (transit stations, bus stops, city/town halls, libraries, community bulletin boards, etc.), local newspaper notices, social media posts, distribution through the MBTA website, and through the communication networks of our community partners. Using available data, MBTA staff identify language needs of affected communities so that project information and public meeting notices are posted in those identified languages to encourage participation from traditionally under-served populations. Utilizing these various communication methods is necessary to reach a broad demographic.

Early notice of a public event is also critical because it allows participants to plan for attendance. It also provides enough time for participants to request any needed accommodations, such as those related to a disability or limited English proficiency. The MBTA generally asks that these accommodations are requested at least 10

days in advance of the event to ensure our ability to meet the needs of the participant. In addition, the MBTA strives to ensure accessibility during virtual public involvement. Requests for accommodations at virtual events should also be sent 10 days in advance.

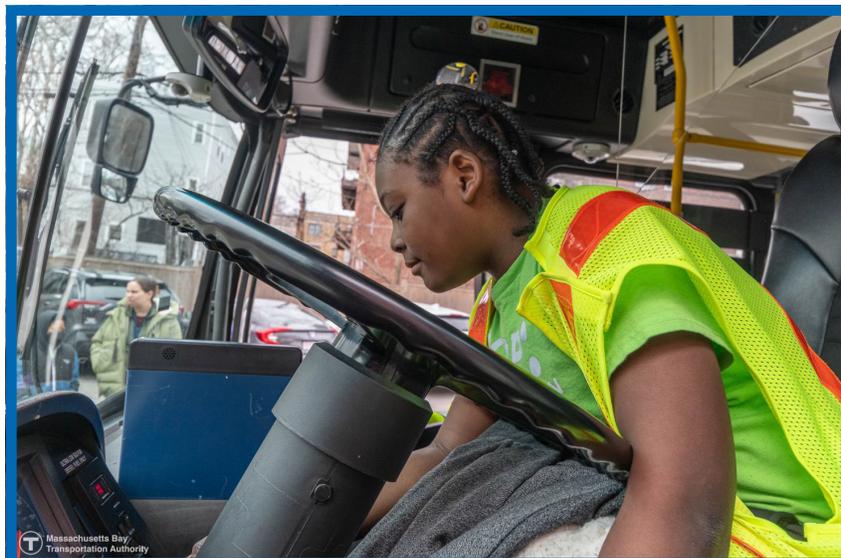
When choosing the location for a community event, MBTA staff consider a number of factors to ensure that the location is easy to get to and accessible for those who wish to attend and participate. All community events should be located within a project's affected community or study area and be accessible by public transit if possible. Additionally, a meeting location will ideally provide Wi-Fi. The location must also be accessible to participants with disabilities and compliant with state and federal accessibility regulations. To achieve this, the MBTA must consider several factors before choosing a meeting location. Some of these requirements include, but are not limited to:

- Accessible via public transportation, if possible;
- Accessible parking;
- Clear paths of travel;
- Accessible entrances;
- Accessible restrooms;
- Accessible meeting room;
- Space for computer assisted real-time transcription (CART);
- Space and signage for language interpreters;
- Adjustable microphones and podiums; and
- Accessible raised platforms.

Beyond ensuring that a public meeting is physically accessible, other accommodations may also be considered. As mentioned above, the MBTA strives to provide additional reasonable accommodations when requested. When the public has an accessibility or language accommodation request, they can make their request through a designated MBTA contact person, which should always be listed on any community event notice or flyer. Examples of specific accommodations that can be provided to individuals in order to allow them to meaningfully participate in a community event include the following:

- Documents in alternative formats (large print, electronic, braille or audible);
- Translated documents;
- Assistive listening devices;
- Video remote interpreting;
- Video and telecommunication voice relay services;
- Closed captioning;
- Computer assisted real-time transcription (CART);
- American sign language (ASL) interpreters; and
- Language interpreters.

Planning for the language and interpretation needs of a community is important. Using available data, MBTA staff proactively identify language needs of affected communities so that project information and public meeting notices are posted in those identified languages to encourage participation from traditionally underserved groups. The public can learn more about language accessibility on our website at: [www.mbta.com/language-services](http://www.mbta.com/language-services).



MBTA KIPP Academy School Visit, 2023



Columbus Ave Open House In Roxbury, 2022

## Public Engagement Regarding Fare Changes

MBTA Fare Policy targets three key goals: revenue<sup>11</sup>, ridership, and equity. From time to time, the MBTA may change fares to target one or more of these levers. Examples include fare increases to increase revenue and the introduction of new passes for reduced fare riders to increase equity.

State law allows the MBTA to raise fares at regular, modest increments, limiting increases to once every 2 years with a cap of no more than 7% for each increase.<sup>12</sup> When considering a fare change, the MBTA develops one or two scenarios and the associated revenue, ridership, and equity impacts.

The MBTA recognizes that any changes to fare costs and products will impact customers. The MBTA is committed to engaging our ridership in a meaningful conversation whenever we consider changing fares. All fare changes and related fare equity analyses<sup>13</sup> are presented to the public for a comment period lasting for at least 21 days. If a fare equity analysis finds that a proposed fare change places a disproportionate burden on protected populations, the MBTA will also engage the public to discuss any proposed mitigation measures, including the less discriminatory alternatives that may be available.

The MBTA sets up multiple channels for comment, including a dedicated web page, online forms or a dedicated email address, a physical mailing address, and

<sup>11</sup> The revenue needed to operate the MBTA comes from multiple sources: Massachusetts sales tax and municipal/ local assessments, own source revenue (e.g., parking, advertising, and real estate), one-time revenue such as grant funding, and fare revenue. The strength of the economy in Massachusetts drives increased revenue from the state sales tax and indirectly drives increased advertising and real estate revenues. The formula for municipal assessments is set by the Massachusetts legislature. Finally, the MBTA can increase revenue through fare and parking rate increases.

<sup>12</sup> As of January 1, 2017, fare increases may only take effect every two years, and not at more than 7% each increase. See An Act Relative to MBTA Fare Increases, 2016 Mass. Acts Ch. 164.

<sup>13</sup> The MBTA's service and fare equity analyses are described in the MBTA's Service and Fare Change Equity Policy, available online at: [www.mbta.com/policies](http://www.mbta.com/policies)

hosting in-person or virtual public meetings and/or hearings for taking testimony. At any such hearing, the MBTA will make a formal presentation regarding the proposed fare changes, and the public will have the opportunity to provide testimony on the proposal for the public record.

The goal of a public meeting about a proposed fare change is to discuss the proposed changes and solicit direct input from the public. This may be accomplished as a standalone meeting or in combination with other, related MBTA initiatives. The MBTA prioritizes meeting formats that allow the public to ask questions directly of MBTA leadership.

The number and location of public meetings about proposed fare changes depend on other ongoing MBTA initiatives, but locations will be selected to cover the MBTA service area while making sure that communities most impacted by the changes have opportunities to comment. As with all public engagement, fare change meetings shall be accessible, designed to disseminate information, and shall take into consideration optimal meeting type (in-person or virtual), timing, location and language equity.

Public input can have an impact on the amount of a fare increase, whether fares are increased on all fare products or types, the introduction of new fare products or programs to serve particular riders, or the reduction or elimination of some fare products.

After the public comment period, MBTA staff reviews and considers the suggestions received and submits any systemwide fare changes to the MBTA Advisory Board for review before creating a summary for the MBTA's leadership. The summary is used to make potential revisions to the proposed scenario(s). A revised scenario is presented to the MBTA Board of Directors with an updated revenue, ridership, and equity analysis.

The MBTA's Board of Directors will make a final vote on a proposed fare change after considering the overall financial condition of the MBTA, the ridership, revenue, and equity implications of the change, the staff's summary of public comments, and comments from the MBTA Advisory Board.

When the MBTA is considering major changes to the fare structure, more significant public engagement is required. Examples of changes to the fare structure are distance-based or time-of-day pricing. These types of changes will include more types of public engagement and a longer time period to explain options and consider different scenarios. Such a process would likely include multiple stakeholder meetings, open houses, and workshops to discuss the trade-offs between policy goals. Once formal scenarios are created, the adoption process follows the same steps as that of standard fare increases.

# Public Engagement Regarding Service Planning and Service Changes

The MBTA has set service objectives and standards for all MBTA services.<sup>14</sup> In order to meet these stated goals, and to accommodate changing travel behaviors in the region, the MBTA regularly evaluates performance of its services and recommends service changes through the service planning process. The service planning process includes system-wide quarterly changes<sup>15</sup>, ongoing rolling Service Plan changes, and an annual evaluation.

Outside of the regular service planning process, service changes can be proposed by any MBTA staff and members of the public, including municipalities, organizations, and customers. The common ways for the public to submit service change ideas are through public meetings or workshops, written correspondence, the MBTA website, MBTA Customer Support<sup>16</sup>, email, and social media platforms such as Twitter. Municipalities can also submit service ideas for the MBTA to pilot through our Service Pilot process.

For any Service Plan, including any proposed major service reductions,<sup>17</sup> the MBTA must engage the public to ensure that the benefits of the proposed changes outweigh any potential downsides. As with fare changes, all proposed major service changes are presented to the public for comment for a period lasting at least 21 days via the feedback channels listed above. For example, the MBTA will schedule one or more in-person or virtual public meetings, including an official public hearing, to present the changes, as well as any equity analyses or tradeoffs behind the proposed major service changes. These public meetings are meant to solicit public comments and any testimony provided at public hearings will be for the public record. All public meetings relating to Service Planning will follow the public meeting values and principles outlined in this document, including holding public meetings, where possible, in the communities that are most affected by the proposed change.

After the public comment period, MBTA staff reviews and considers the suggestions received, and submits any proposed decreases in systemwide service of 10% or more to the MBTA Advisory Board for review before creating a summary for the MBTA's leadership. The summary is used to make potential revisions to the proposed service changes. For proposed major service changes, a final proposal and

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<sup>14</sup> The MBTA's Service Delivery Policy can be found online at: [www.mbta.com/policies](http://www.mbta.com/policies)

<sup>15</sup> Quarterly changes can be implemented with existing equipment and within the adopted budget after being approved by the Service Committee per the MBTA's Service Delivery Policy.

<sup>16</sup> For information on how to contact MBTA Customer Support, visit: [www.mbta.com/customer-support](http://www.mbta.com/customer-support)

<sup>17</sup> The MBTA's definition of major service change, including major service reduction, can be found in the MBTA's Service and Fare Change Equity Policy, available at: [www.mbta.com/policies](http://www.mbta.com/policies)

equity analysis is presented to the MBTA Board of Directors who will vote to approve the final proposal and accept the equity analysis before implementation.

Additionally, the MBTA provides avenues for ongoing communication through its website, customer phone line, social media outlets, standing committees, and comments sent to individual MBTA employees. Service-related comments and requests are directed to the appropriate department for consideration and response. Upon request, MBTA staff will also consider attending public meetings held by municipalities or with public officials to address specific service issues. From time to time, the MBTA may conduct specific market or route-based meetings to gather direct feedback on potential service changes. This ongoing public outreach informs both the quarterly service planning process and the Service Plan process.

## Public Engagement Regarding Capital Projects

Capital projects are developed in response to identified needs in the system and arise from suggestions or concerns about an asset or through corridor or area planning processes. Capital needs are also identified through planning organization initiatives or may arise from community, legislative, or citizen input. Input from the public is essential for the MBTA to continue to meet the evolving needs of riders.

The MBTA, in coordination with the Massachusetts Department of Transportation (MassDOT) Office of Transportation Planning, has developed a long-range investment plan to position the MBTA to meet the needs of the Greater Boston region in 2040. In developing the plan, known as Focus40<sup>18</sup>, MBTA and MassDOT conducted significant research and public engagement to identify future needs for MBTA service. Through these initiatives, the public had the opportunity to influence what projects the MBTA builds. Working with local MPOs and other planning agencies as well as directly with MassDOT on our long-range planning is the best way to identify future transportation needs and get projects into the pipeline. Identified needs ultimately develop into projects contained in the MBTA's five-year Capital Investment Plan (CIP).<sup>19</sup>

Once a project is prioritized through the CIP process for funding, individual project planning and design begins. During the planning phase, potential issues, impacts, and required approvals are identified in order to determine which design and permitting processes may apply. Public engagement on a project should begin early

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<sup>18</sup> The MBTA's long range investment plan, Focus40, can be found here: [www.mbtafocus40.com](http://www.mbtafocus40.com)

<sup>19</sup> Capital Investment Plan can be found here: [www.mass.gov/service-details/capital-investment-plan-cip](http://www.mass.gov/service-details/capital-investment-plan-cip)

in project planning and before there is a recommended course of action. For major projects, the initial public engagement process should start before design and continue at critical milestones throughout the planning process.

Public meetings are conducted during the planning phase in order to relay information to the general public and to solicit input concerning the project. The public meetings serve as forums at which the MBTA can learn about and respond to community concerns. Some projects, particularly those related to system maintenance and asset improvement, may not necessitate public engagement. However, progress on those initiatives should be reported out to the public regularly.



Informational posters at an in person CIP meeting, 2023



In Person Public Meeting on the Proposed FY2024-2028 Capital Investment Plan, 2023

After a construction contract is awarded, a construction management plan should be developed. The permitting agencies, local authorities, businesses, and affected members of the general public need to be informed of changes in detours, traffic operations, alternative service, and construction areas and activities occurring throughout the project.

Before construction activities begin, the project managers shall determine the appropriate type of public notification and participation needed. Projects result in different types of disruption to transportation and other nearby activities. For simple projects, a minimal degree of public engagement may be needed. For these projects, the project owner should, at a minimum, notify abutters (in languages other than English, if appropriate) of the impending construction activity. For more complex projects, more public engagement may be needed. Monthly or quarterly stakeholder and abutter meetings may be held when the size or location of a project calls for them. In addition, the MBTA will utilize the following communication tools to share project information and receive feedback:

- MBTA website;
- Media outlets, both print and TV;
- Social media tools; and
- Public affairs email account.

While the depth of public engagement does depend on the size, scope and complexity of a project, the MBTA values consistent and regular communication with the public, along with opportunities for the public to share their feedback at regular intervals.

## Public Engagement in Policy Development

The MBTA develops policies to guide our decision-making in a transparent manner and inform members of the public and stakeholders what they should expect.<sup>20</sup> Some policies, like those relating to civil rights and Title VI, are federally required and require formal public engagement following the standards outlined in this Plan. Other policies, like our Service Pilot Policy or Service Delivery Policy, are not federally required. Even so, the MBTA is committed to engaging our customers on issues important to the riding public. Therefore, policies like these are crafted based on input the MBTA has received through ongoing public dialogue. Riders who are potentially impacted by changes in policy will be engaged, as appropriate.

## Continuous Engagement

The MBTA provides a service to riders every day, outside of capital projects, fare changes, service changes, and policy development. Therefore, it is vital to maintain open communication with riders outside of these specified engagement opportunities. The MBTA has forums for riders to give feedback outside of broader, project-specific engagement opportunities, such as through the MBTA Customer Support and social media. The MBTA monitors and uses this feedback to improve the quality of the service delivered to our riders.

## Closing

The MBTA is committed to doing our part in improving the Commonwealth's transportation system. Meaningful, continuous, and accessible public engagement is critical to doing so efficiently and successfully. By utilizing the strategies and methods set forth in this document, the MBTA is confident that together, we can enhance how we move.

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<sup>20</sup> MBTA policies can be found here: [www.mbta.com/policies](http://www.mbta.com/policies)

