



# Alameda County Older Adult Group Travel Training Manual



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**ACTIA**  
1333 Broadway, Suite 300  
Oakland, CA 94612

**Nelson\Nygaard Consulting Associates**  
785 Market Street, Suite 1300  
San Francisco, CA 94103

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# Chapter 1. Introduction

## Chapter Overview

This chapter has sections to assist you in getting started with your training

1. Travel Training Manual Overview and Goals and Objectives
2. How to Use this Manual
3. Background to Mobility in Your Community
4. Older Adult Learners
5. Motivation for Riding Public Transit
  - a. Understanding Emotions
  - b. Overcoming Environmental Barriers
6. Deciding on a New Mobility Mode
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9. Trouble Shooting
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  - c. Challenges in Large Group Presentations

## Travel Training Manual Overview

This manual is for trainers and their volunteers who are conducting travel training programs for older adults living independently in the community. The manual serves as a complete toolkit for trainers by providing:

1. Background information on the growing importance of travel training programs geared to mobile older adults. This information may be used to promote the program among service providers, in recruitment of older adults and when talking with the media.
2. Organizational tools used in setting up travel training programs to ensure the program runs smoothly at the training site.
3. Specific scripts for travel training presenters accompanied by PowerPoint slides that help focus a training session with accurate information. Tips for field experience and a checklist make sure the experience riding on public transit as a group remains positive.
4. Forms and handouts serve a number of purposes. Liability forms can help safeguard the sponsoring organization. Registration forms and travel experience assessments ensure training is customized to participants. Handouts at the presentations improve learning by highlighting important information that may be reviewed at a later time.

The goals of this manual and the tools found within it are to:

1. Provide trainers with confidence that they can successfully share with older participants the overwhelming amount of information about transit in a manner that smoothes the progress of older adult learning and inspires older people to use transit.
2. Assist organizations in orienting new travel trainers to instruction skills and transit materials.
3. Assist in recruitment of travel training participants.
4. Ensure consistent messages about travel training throughout Alameda County.

## How to Use This Manual

Trainers will find in each Chapter specific information for each step of your training process.

Chapter 1 serves as an overview of the manual to get you started. The Background section introduces the importance of travel training and offers the trainer facts to use when talking with the media, other service providers or co-workers in their own organizations to better

understand the importance of the training. Understanding the motivation for taking a class and hopefully continuing on to use public transit helps trainers see the unique situations that either encourage or discourage older riders, and how to build and maintain confidence to take transit.

Chapter 2 provides you with suggestions and a step-by-step guide to planning a training event, from advertising your event and recruiting participants, to a checklist for organizing your sessions. These are suggestions that you will need to adapt to communities and your specific needs. The chapter is a good reminder to reread even after you complete a few trainings.

Chapter 3 provides background information for the classroom training scripts in Chapter 4, as well as tips for preparing for a training event and a listing of equipment and materials you may require.

Chapter 4 on presentations offers you scripted interactive talks for older adults. The guide includes a script for the facilitator, instructions for activities, and suggested time allocations for each segment. The facilitator's script is introduced with facilitator in boldface and italics. For example:

***Facilitator:*** How many of you....

Directions on conducting activities or listening for key words during audience participation are in italics. For example:

*Write down the audience responses.*

You do not need to follow the script word-for-word. Often, putting the questions in your own words and tailoring the language to your audience is better. Use real life examples or appropriate stories from the media. Script examples are provided only to get you started with your presentation. Also note the suggested time is given for each segment listed after the title to help you cover all material in the scheduled time.

Chapter 5 provides an overview of content to be covered in field trainings and guidance for planning and leading an effective field trip.

Chapter 6 offers a brief discussion of strategies for providing follow-up support to trainees after travel training has occurred.

Handouts for your session are included at the back of the manual titled "Handouts and Forms." The handouts allow trainees to follow the discussion, take notes if they wish and have a reference guide after the training to take home.

## Background to Mobility in Your Community

For older adults, using public transportation can provide freedom, independence and help maintain physical and mental health. Isolation is a major contributor to depression among older people in the U.S. Studies have shown that isolation resulting from loss of a driver's license and the accompanying reduced mobility can affect physical health as well.

Commitment to maintain the health and wellbeing of older community members includes making mobility training available to all who need assistance learning to ride public transportation. People needing assistance may include older adults who

- Are new to the community
- Have never had a prior need for public transportation
- Have ridden one type of transit and may want to learn another such as understanding the BART system in addition to the bus
- Use the transit systems, but now are challenged to navigate changes in public transportation such as the introduction of Rapid Bus.

Keeping this larger goal of older adult wellbeing and health in mind while conducting travel training helps each of us to stay focused on our mission.

## Older Adult Learners

Travel trainers have often conducted programs with people from the disability community rather than older adults. The two populations have differences. While many older adults may have a chronic health problem that limits their function or mobility, they also have a lifetime of experience in navigating public systems from work requirements to filing taxes or applying for citizenship. Building on these strengths, respecting years of developed social skills, and keying in on possibly different motivations for community interaction, increases the likelihood of successful training.

## Motivation for Riding Public Transportation

At any age, fear of change is a normal reaction. For older people, who have engaged in certain habits and life patterns for many years, change can be seen as:

- A threat to feeling competent  
(I ask stupid questions; I don't know where I'm going)
- An opening for humiliation  
(The driver and passengers treat me disrespectfully)
- A possibility for embarrassment  
(I'm too slow; I'm holding up the other passengers)

- A peril to living independently  
(I may fall, break my hip and have to go to a nursing home)
- A source of anxiety, fear or loss  
(What if the bus is late and I miss my doctor's appointment; I no longer can drive)

Motivation to change behavior or habits comes from both internal messages and external influence. Internal influences can include emotional responses and desires. External influences come from the world around us such as culture, architectural barriers or language.

## **Understanding Emotions**

Traveling on public transportation can trigger both negative and positive emotions. People may fear for personal safety, getting lost or being stranded, forgetting routes, using the lift, having health problem while riding public transit, not being able to communicate, or falling. Riders may be leery of crowds and even the vehicle itself. Negative responses can come from past experiences or stories relayed by friends about vehicle operator insensitivity or behavior of other passengers. Yet, the positive feelings of freedom to visit friends, conduct daily business or attend a special event can motivate potential users to begin the transit adventure.

Long-held habits like jumping into a car and turning the key or riding with a friend are comforting when life becomes difficult. Changing or giving up a habit is a loss that is added to the other losses accumulated through life. The change to riding public transit may accompany grief for loss of driving or a move from a familiar bus line.

## **Overcoming Environmental Barriers**

Older adults struggle not only with personal barriers, but also with barriers created by the external world. Societal beliefs may give the message, for example, that life should be comfortable and easy, especially for older people. But in reality, mobility options are not always easy.

Our communities have invested heavily in the provision of curb cuts, large print signs and information translated into many languages, yet the day-to-day experience of older adults encountering architectural barriers and confusing messages still poses a challenge.

Kneeling buses have helped many older adults step onto a vehicle, yet even when buses do kneel the gap between the vehicle and the curbs may pose a challenge. Riding BART when elevators or escalators are not functioning may strand a person in a station. These two examples can discourage use of public transit.

## **Working with Emotions and Barriers**

Increase your understanding of the participants in your travel training sessions by asking a few questions on the registration form or at the beginning of the session. The questions help to understand the trainees' feelings and experience. With this information the travel

trainer can help develop appropriate responses and strategies. When these emotions or barriers come up during the training sessions:

1. Acknowledge the feelings or the difficulties of a barrier
2. Respond with empathy and understanding
3. Get ideas from the individual or group on how to resolve situations

The goal is to help the participants understand, and manage their feelings as normal, and to empower each participant with confidence in overcoming barriers. Participants can feel very good about their accomplishments throughout the training process.

## Deciding on a New Mobility Mode

Establishing new habits can be stressful and requires a great deal of personal adjustment. Making a commitment to begin to ride public transportation is a matter of tipping the scale from comfortable old habits to attractive new options that meet needs. These needs form important motivations that can include:

- Social benefits
- Financial incentives
- Peace of mind or stress reduction
- A sense of accomplishment
- A desire for fun

## Stages of Change

Nearly twenty years ago, Dr. James Prochaska explained how people change by describing five stages. Prochaska found that understanding the difficulty of changing helped his clients. The questions and concerns summarized above often occur at each of the five stages that follow:

1. Precontemplative
2. Contemplative
3. Preparation
4. Action
5. Maintenance

For the travel trainer, understanding these stages can help you understand how to

1. Recruit participants into your training program
2. Assess the needs of participants and respond appropriately
3. Build in strategies for participants to maintain their confidence in riding public transportation

These stages are described in more detail below:

### **Precontemplative**

*Description:*

The individual is not thinking about riding transit, and may not even want to know about the mobility options. Future planning for giving up the car keys is not even thought about.

*Motivational Issues:*

The individual may be unaware of the transit options, does not value public transit, or is demoralized over past failures. In this stage, the negative aspects of the change are more evident than the benefits.

*Techniques for moving to the next stage:*

The person appears defensive when presented with messages such as “ride the bus.” Family or friends riding transit may influence the change. Recommendations from authorities such as ministers, elders in the faith, doctors or political figures may affect change to riding the bus or BART.

*Reactions from the person:*

I won't

*Length of time spent in this stage:*

This stage may be extended over months and years. People may move to the next stages and return to this stage due to interruptions in their lives such as illness or bad experiences on transit.

### **Contemplative**

*Description:*

The individual is thinking about change, but is still unsure. Problems in getting around may be more evident, but the solutions are not. Driving retirement may be considered, but is not yet a pressing issue.

*Motivational Issues:*

An individual may not know how to ride public transit or use travel training.

*Techniques for moving to the next stage:*

Reinforcement for change comes from many sectors—family, healthcare providers, AARP Mature Driver course, faith communities.

*Reactions from the person:*

I may

*Length of time spent in this stage:*

This stage may also take a long time. People may cycle in and out many times.

## **Preparation**

*Description:*

The individual begins weighing the pros and cons. As the pros become more compelling, the person begins to think about the advantages of riding transit.

*Motivational Issues:*

The person may be fearful about the ability to navigate the transit system.

*Techniques for moving to the next stage:*

Coming to classes and seeking information supports the change to riding. Riding with friends and family may inspire confidence. Setting goals helps reinforce continuing to the action step.

*Reactions from the person:*

I will

*Length of time spent in this stage:*

Action comes within a month. Again, time varies depending on moving to another stage and returning.

## **Action**

*Description:*

The individual begins to ride independently and feels in control. Individuals frequently turn to others for assistance and support.

*Motivational Issues:*

Outlining a successful trip becomes important to see the advantages of riding. Turning to goals for riding helps reinforce continuing to take the bus.

*Techniques for moving to the next stage:*

At this point, making environment as encouraging as possible for success is most important, including strategies for overcoming barriers.

*Reactions from the person:*

I am now

*Length of time spent in this stage:*

This stage lasts approximately 6 months and may be cycled in and out of by the individual.

## **Maintenance**

*Description:*

Individual has a regular routine and riding transit has become a habit.

*Motivational Issues:*

Bad experiences are a minor issue or the person has developed self advocacy plans to deal with the problems.

*Techniques for moving to the next stage:*

Providing rewards and incentives and sharing successes help to encourage continuation of ridership. Incentives can include becoming a teacher/mentor or serving as a role model.

*Reactions from the person:*

I have

*Length of time spent in this stage:*

Riding on a regular basis for more than 6 months locks in the habit. Lapses may occur, but generally the individual can restart transit riding.

## **Readiness to change**

Unlike an on-off switch, readiness to change appears in degrees. Early levels of readiness begin with a shift in how the person sees the importance of changing. Eventually the pros will outweigh the cons.

For example, an older person understands, and places great importance on, visiting friends by riding the bus. But if she has 1) little confidence in being able to read the schedule and get off at the appropriate stop or 2) doubt in her own ability to ask for assistance from the driver, the resulting feelings give the trip a low priority. This discomfort about using transit can take a person on a roller coaster ride of feeling trapped then independent, depressed then optimistic. The following chart weighs the costs and benefits of riding transit.

Costs of Not Changing	Benefits of Not Changing
<ul style="list-style-type: none"> <li>• Reduction of activities</li> <li>• Loss of social supports</li> <li>• Becoming isolated</li> </ul>	<ul style="list-style-type: none"> <li>• No need to learn the transit systems</li> <li>• Reduced anxiety over missed buses, missed stops, etc</li> </ul>
Costs of Changing	Benefits of Changing
<ul style="list-style-type: none"> <li>• Advanced planning required</li> <li>• Securing a pass or having the appropriate change</li> <li>• Learning a new system that may seem complex</li> </ul>	<ul style="list-style-type: none"> <li>• Feeling freedom to travel without seeking assistance from others</li> <li>• Feeling accomplished and independent</li> <li>• Participating in more activities</li> <li>• Helping maintain clean air in the Bay area</li> </ul>

Until people place a value on changing behavior and give that value a high priority, they will not have enough motivation to tip the scales toward action. Scaling questions is one way to help identify priorities and find motivators to increase the value of riding public transportation.

Ask your travel training participants to pick a number on a scale from zero to ten, with ten indicating the strongest incentive, priority and sense of confidence to change. For example:

Older Person: I give the degree of confidence to riding the bus as a five.

You: Why not a six?

Older Person: I can never understand those schedules and the print is too small to read.

You and the older person can now develop strategies to overcome this barrier to riding. People act on their own decisions, not advice from others. The use of scaling allows you to avoid giving advice and to rely on listening for cues to barriers. Another question to help develop strategies for change could include, "What would it take for you to move from a five to a seven? How exactly would you see this happening?"

The following chart is a summary of the questions, concerns and decisions an older person will make in deciding to use public transit.

	Key Questions	Concerns	Resolution
<b>Importance of the Change</b>	Why? <ul style="list-style-type: none"> <li>• Why should I do it?</li> <li>• What are the benefits?</li> <li>• What are the costs?</li> </ul>	<ul style="list-style-type: none"> <li>• How will not getting around on transit affect my life?</li> <li>• What are the risks?</li> <li>• What are the advantages to changing my behavior?</li> </ul>	If the following conditions are met, there is reason to change: <ul style="list-style-type: none"> <li>• The lack of mobility will reduce my quality of life.</li> <li>• Asking friends/family for rides negatively restricts my activities</li> <li>• My ability to drive will become restricted</li> <li>• I can no longer drive a car safely</li> <li>• The benefits of riding transit are worthwhile</li> <li>• The pros outweigh the cons</li> </ul>
<b>Confidence in the Ability to Change</b>	What? How? <ul style="list-style-type: none"> <li>• Am I able to do this?</li> <li>• How can I do this?</li> <li>• What will change?</li> </ul>	<ul style="list-style-type: none"> <li>• What are the barriers to changing?</li> <li>• What will make it difficult?</li> <li>• Am I able to make this change?</li> <li>• Will I be able to follow through?</li> </ul>	If a person believes that he or she is capable of <ul style="list-style-type: none"> <li>• Making the change and</li> <li>• Coping with the difficult aspects, it is likely that the person will change.</li> </ul>
<b>Readiness to Change</b>	When? <ul style="list-style-type: none"> <li>• At what time?</li> <li>• What are my present priorities?</li> </ul>	<ul style="list-style-type: none"> <li>• When are the changes easiest and most difficult to make?</li> <li>• What makes this change important now?</li> </ul>	The older person must: <ul style="list-style-type: none"> <li>• Feel prepared to make the change</li> <li>• Decide when</li> <li>• Give it a priority</li> </ul>

## Keys to Effective Training

In addition to considering the participants' stage of accepting and riding transit, the following tips will also help your travel training presentations.

### Learning needs

With age, many senses such as sight, hearing, touch, balance and reaction time may change. Each person experiences changes in physical health and function differently, but in general consider the following:

1. When possible, use a microphone
2. Talk directly to the audience so participants who lip read can see your mouth
3. Provide materials in 14-point type or ensure that magnifiers are available at all training sessions where materials are distributed
4. When conducting field trips, ensure that participants are properly seated or know where to grab for stability before the vehicle begins to move.

People generally learn better by doing rather than just listening. You can encourage “doing” by engaging participants through

1. Written exercises and puzzles
2. Problem solving through discussion
3. Open questions to the group that require more than a yes or no response.
4. Demonstrations that participants can then do on their own in small groups or individually.

Use as many of the senses as possible to bring home your main points. Repeat these main messages at least three times during your session. Take cues from the participants as to the speed and conditions of training.

As you dive into the content of your presentation, teach people where to find information rather than memorizing facts. Structure the topics in the session so that each task builds on the previous successes. Keep the steps short with no more than three key points. Check back to see that the trainee has understood the explanation, by asking for restatement or demonstration.

Communicate a positive acceptance of each participant, regardless of success or failure during the travel training lessons. Listen to each question before you form your answer. Work to understand concerns of the participant. Partner with the participants to find solutions and answers. It’s easy for you to provide the answer, but a better learning experience if the group can come up with the solutions.

## **Safety**

Always keep safety as the foremost concern. When holding field training, plan your route and know your surroundings. Have an alternate route in case an unexpected situation arises. Prior to starting the trip, let someone know where you will be going, what time you expect to arrive, and when you plan on returning. Carrying a cell phone on the trip is a good idea.

Give the participants advanced notice when your stop approaches. Preparation reduces anxiety and allows time for participants to gather their belongings, feel less rushed and as a result, reduces the possibility of falls or injuries.

Provide training during non-rush hours and before children are out of school to give a relaxed and less confusing experience.

## **Trainer attitude**

Your greatest success will come when you are patient, keep a sense of humor and make the learning process fun.

## Travel Training for Members of Cultural and Ethnic Communities<sup>1</sup>

Alameda County is among the most diverse counties in the country and is home to older adults from a wide range of ethnic and cultural groups. Extending travel training opportunities to members of cultural and ethnic groups is particularly important given the potential for linguistic or cultural isolation among older adults belonging to these groups. A recent survey of agencies serving older adults conducted by the Alameda County Area Agency on Aging identified isolated older adults—including culturally and linguistically-isolated individuals—as those at greatest risk in Alameda County of not receiving needed services and support to remain healthy and financially secure. According to the US Census, over 15,000 individuals 65 or older in Alameda County were linguistically-isolated in 2000.<sup>2</sup>

Providing travel training in a multicultural context poses additional challenges as well as opportunities, as approaches and methods designed for any single group may not be appropriate or effective for members of another. Therefore, it is important for training providers to acknowledge the significance of culture as it relates to breaking down barriers to participation in travel training and transit use. Culturally competent trainers ensure that travel training is both accessible and acceptable to potential participants.

### Cultural Competency

Cultural competency involves translating knowledge about cultural beliefs and practices into delivery of services, so that services are both accessible and acceptable to participants. These two characteristics of cultural competency are defined below:

- **Cultural accessibility**—Culturally accessible service delivery “opens the door” to services for elders from diverse cultures. Consider the structural barriers to participation such as affordability, the hours or days when services are available, location of services, or ineffective communication about the services being offered.
- **Cultural acceptability**—Culturally acceptable services are those that elders from multicultural communities would want to walk through the door to receive. To create culturally acceptable services, consider factors such as language, religion, family and social roles, and acculturation.

Moving toward culturally appropriate service delivery means being:

- Knowledgeable about cultural differences and their impact on attitudes and behaviors;

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<sup>1</sup> Elements adapted from Administration on Aging (2001), *Achieving Cultural Competence: A Guidebook for Providers of Services to Older Americans and Their Families*. Available at <http://www.aoa.gov/prof/adddiv/cultural/CC-guidebook.pdf>.

<sup>2</sup> This term means that all household members age 14 and older speak a language other than English, and that no member 14 or older speaks English “very well”.

- Sensitive, understanding, non-judgmental, and respectful in dealings with people whose culture is different from your own; and
- Flexible and skillful in responding and adapting to different cultural contexts and circumstances

## **Tips for Providing Travel Training for Members of Cultural and Ethnic Communities**

In addition to influencing participation in training opportunities, culture can influence travel behavior in many important ways. Cultural norms may determine how members of an ethnic community use transit services. For example, in some cultures women are unlikely to travel alone on public transit. Similarly, past experiences with public transit in participants' countries of origin may influence expectations regarding public transit such as regularity of service, payment or waiting in line. Awareness on the part of trainers of cultural issues related not only to participation in the training itself, but also the ultimate use of public transit, is an important element of culturally-acceptable travel training. The following are strategies to consider when providing travel training to members of ethnic communities:

- Establish partnerships and relationships with key community resource people in order to support developing accessible and acceptable trainings.
- Involve bilingual and/or bicultural staff or volunteers in designing the training, conducting outreach, and providing training.
- Make use of existing peer-to-peer support networks, or design trainings that promote development of new peer support networks within communities. Networks may be related to families, exclusively to women or to men and may include multiple generations.
- Work to understand participants' past experiences with, and expectations regarding, public transit. Public transit service models, levels of service, or other factors may be very different in Alameda County, relative to participants past experiences.
- Remember that culture is dependent on family and individual interpretation within particular ethnic and cultural groups and can be quite diverse. Various factors can lead to differences among individuals within cultural groups, including educational level, income level, geographic residence, identification with community groups, length of residency in the U.S., and age, as well as individual experiences. For this reason, members of the same ethnic group may respond very differently to the opportunity to participate in travel training, and to the training itself.
- Provide on-going contact and follow-up. One major factor in continued use of transit is regular contact with trainers or their organizations. The contacts not only serve as reminders, but give the message that the organization continues to care for the wellbeing of those with the cultural and ethnic community and that use of transit is important enough to maintain a relationship within the community.

Some lessons learned from travel training sessions conducted in southern Alameda County ethnic communities during the summer of 2008 include the following:

- In some ethnic communities, barriers to participation in travel training for novice users may be compounded by cultural norms which prioritize safety and familiarity over independence, or which suggest that only those whose families do not care for and respect them would leave them to ride the bus, or where being caught in an awkward situation of not knowing how to do something such as pay the fare may generate a very strong sense of embarrassment. Recruitment and training approaches may need to be tailored accordingly.
- Personal relationships were very important in attracting seniors to the workshop.
- Destinations of interest to trainees often included commercial and cultural sites, for example, markets selling food and wares from home countries.
- The instructional design must be adapted to the time lag involved in having interpreters.
- The instructional design must also be adapted to cultural norms. For example, in a training with Chinese seniors, a preliminary brainstorm exercise that is intended to elicit trainees' questions about transit was not effective. The trainer was informed that it is not customary in the community to ask people to identify questions until instruction has been completed.

## **Effective Communication Strategies**

In order to capture the attention of potential trainees, communication strategies should involve vehicles that are proven to have value to the target audience. Some options to consider include:

- Materials in the language and reflecting the culture of the group you want to reach. Translations word-for-word do not necessarily convey the meaning or tone you want. Have materials reviewed by someone from the local community to ensure that the messages are both meaningful and appropriate.
  - Use of pictures that include people from the cultural group you wish to serve to show the issue as "being important to people like me."
- Use of people-to-people contact provides a welcoming and personal touch to the audiences you wish to serve.
  - Volunteer or staff outreach in key locations, such as community centers, faith communities, and club meetings.
- Use of community-based media outlets such as newspapers, newsletters, radio, and flyers and posters available in locations where members of the community are likely to congregate.
- Use of alternatives to print media if limited literacy is an issue within the group.

## Availability of Multilingual Transit Information and Trip Planning Assistance

The table below summarizes the resources available at Alameda County transit agencies in languages other than English. Note that the availability of multilingual trip planning assistance is dependent on staffing at agencies—that is, assistance may not be available on all days.

Agency	Information available in languages other than English?	Trip planning assistance available in languages other than English?
AC Transit	System maps provide fare, customer service and ticket purchase information as well as direction to the AC transit website in Spanish, Chinese and Vietnamese.  General description of AC Transit services available online in Spanish, Chinese, and Vietnamese (not easily found on website, however).	Assistance available through 511 in Spanish, and potentially Mandarin, depending on staffing.
LAVTA	Bus Book (map and schedule book with rider's guide) includes Spanish translation of information related to fares, vehicle characteristics, reading schedules and maps, transferring, regional transit connections, accessibility features, safety, bike racks, and bus stops.	Customer service staff provides bilingual English-Spanish assistance during business hours (5:00 a.m.-6:30 p.m. Monday through Friday; 8:00 a.m.-5:00 p.m. Saturdays). After hours, assistance in Spanish <i>may</i> be available if Spanish speakers are on duty (calls roll over to dispatch).
Union City	Supplemental schedule for service to Sikh temple (Fremont) published in Punjabi. No other multi-lingual materials.	Not available.
BART	Basic overview of BART services available online in Chinese, French, German, Italian, Spanish, Japanese, and Korean (not easily found on website—see Rider Guide/Overview/Other Languages).  Printed "BART Basics" available in Spanish and Chinese.	Assistance available in Spanish, Filipino, and Mandarin, depending on staffing. Initial prompts on phone line are in English only.

## Trouble Shooting

Handling challenges that may arise during your travel training can vary from individual interactions to working with large groups.

### Handling Complaints About Transit

In some sessions you may have participants who have experienced a difficult situation while riding the bus or BART. The complaints can either be informative and add to the learning or sidetrack the training. Initially, try to turn what may be a negative occurrence in bus travel into a positive travel training learning experience. Listen with concern and then

seek solutions from the person who had the negative experience or the group. Because you are a trainer, you are seen as an authority with the ability to impact the transit systems. Sharing the problem solving can empower the group to approach situations with confidence.

Having two trainers for each session can help defuse a difficult situation. If the complaining is affecting other participants—either causing fear or encouraging negative comments—one of the trainers can invite those with concerns into a private meeting to hear the complaints. If the meeting takes place, be sure that the concerns are relayed to the transit authorities and a response is given to the participants with the complaints. Your credibility is at stake, so be sure to follow-up.

You also can ask the group if they would like to meet at a different time with bus or BART officials to share their concerns. Arranging a future meeting where concerns could be heard and addressed may allow you to reconnect with the participants and continue with the travel training. Be sure not to argue with participants even if the information may be incorrect.

## **Handling The Difficult Individual**

Generally three things can happen when you have one person not following the flow of the group. The person can be silenced by the group, sway the group into an argumentative and negative audience or the trainer can maintain the control of the session so the training can continue. There may be a few types of difficult trainees.

The Negative Person: Nothing seems positive from this person's viewpoint. Whatever you say is turned to negative response. As a solution,

1. Try using the other participants to help. When the negative response begins, ask the other participants if they have some suggestions to help the person with his or her difficulties. The other participants will appreciate that their expertise can be of assistance.
2. Thank the person for sharing their experiences and move on.

The "Got you" Person: Some people thrive on being able to show others their knowledge or bravery in confronting an authority figure. The questions are often disguised as a forum for their point of view. The solution may be

1. To allow this person to share their knowledge, briefly.
2. If you are asked questions that you may not have the answers to, be honest and tell the group you will find out the answer for them.

### The Angry Person: Sometimes individuals just want to let off steam.

1. If appropriate, you can show empathy which doesn't mean that you agree with the person. It does require you to patiently listen and acknowledge the feelings. You might want to say "you really feel strongly about this issue." Or "You make a fair point." Ask questions and seek their answers. Thank them and move on. Giving too much attention to an angry person may just feed the flames and not really bring them around to your point of view. You are responsible for the members of the class and giving them a good experience.
2. As with the complaining about transit that we discussed above, it may be best to talk with the person later or have your training partner take them aside.

## **Challenges in Large Group Presentations**

Leading a group successfully is based on two major goals

1. People must participate either actively or be quietly engaged for a whole hearted effort to use transit.
2. The goodwill that each participant brought into the classroom to learn about transit must be harnessed and focused to maintain momentum to step onto a bus or take BART.

To reach these goals in facilitating the group, create a safe and interactive group environment. How you do this in a group larger than 20 can be done with a few techniques.

1. To gain participation, ask questions of the group. Before the class starts walk around the room and introduce yourself to participants. Remember the name of a few outgoing trainees. You might be able to direct questions to them to get the ball rolling and develop a feeling of safety among group members.
2. When posing a question to a large group, you might get half the participants wanting to respond. Start your question with, "I'd like to hear from three people about..." You have set the expectation that three people will have the chance to answer.
3. Try to solicit responses from participants who have not had an opportunity to speak, but don't force a response if someone is shy.
4. Never indicate that an answer is a wrong answer. No one likes to be wrong. You can indicate that an answer is one perspective or that you can understand how someone might view the question that way. You might say, "I can see where that might be correct, but I was looking for ..."
5. Allow participants to ask the questions as they come up. If the question draws away from the focus of the current material, you might want to respond, "That's a good

question. May I answer you in a couple minutes when we get to that section?" If the question applies only to one person try: "That's a great question. I'd like to talk to you about it at the break. OK?"

6. Check in with the audience periodically. You might ask if you are answering their questions about the service. Sometimes when asking, "are there any questions?" you might get silence. This does not necessarily mean that they understand the information. Ask a direct question about the material.



## Chapter 2. Program Organization Guide & Recruitment for Travel Training Programs

This chapter gives you a step-by-step outline for developing a recruitment plan to enlist participants for your travel training events. By answering four key questions, the Program Organization Guide walks you through the process.

1. Who is the audience?
2. What do you want to accomplish?
3. What do you want to say to your audience and how often?
4. How do I get from plan to program?

### **How do you begin the planning process?**

You may want to involve a planning team. Teams can help develop a single class or activity, or a full campaign that uses various programs and activities in a sustained manner. To address travel training, you can offer a single course to older adults, a refresher course, or develop travel clubs to maintain interest and motivate use of the public transit systems.

A full program that continues to connect users to the transit system can use various public information tools and media channels sustained over a longer time, which has a far greater chance of successfully affecting ridership.

Increasing older adult ridership is a process of changing individual behavior and changing the environment of a community to encourage safe usage. Using community members and key organizational partners in either effort further increases your chances for success.

### **Who is the audience?**

Before developing goals, begin your planning process by identifying the intended audience. In fact, you may have several distinct audiences that you want to address with different programs. Will the audience be existing bus users—or can the topic, goals, and content level appeal to a broader group? Will you reach out to those still using their cars? Or family members who may influence the older person's use of public transit?

In defining your audience, consider the action you'd like them to take as a result of your campaign.

- What do they believe now?
- What benefit will they receive from listening to your program?

- How can you make it easy for the audience to become involved and take action to attend a training event or bring a family member?

How you answer these questions and the nature of your audience will determine your selection of messages to deliver, as well as your advertising, location, and speakers.

## **What do you want to accomplish?**

Have your planning team determine four to six goals. These goals will help you focus the program and evaluate its success. Ask yourself, “Are the goals clearly stated and measurable so I will know if I achieved them?” Ensure that the goals of potential partners such as the transit agency, ACTIA or the host organization are consistent with your own. For example, you may wish to bring a bus driver to an event; establishing goals will assure that your efforts stay aligned.

If you have more than one target audience, have strategies to address your overall goals with each group.

## **How do I get from plan to program?**

The seven basic steps for program planning include:

1. Reviewing program material (content and format)
2. Finding a location
3. Identifying the presenter
4. Publicizing the program
5. Coordinating the program
6. Creating handouts or packets
7. Planning the evaluation and follow-up

## **Step 1 Content and Format**

The lecture format, usually followed by a question and answer session with participants, is useful for getting a great deal of information to the audience, but often is not as effective in changing behavior or engaging the audience as more interactive formats. In this manual, you will find short, 20 minute presentations that use the lecture method. These short lectures are best used for informing the audience of your program with the goal to recruit participants. With these short events, you will convey some important information with the goal as a call for action to take the training or as a reminder to continue using transit.

Group interaction format engages the audience and is especially useful for a small, select audience—for instance, people who have recently retired from driving, caregivers, or users who have encountered difficulty in the riding experience.

## Step 2 Where: Determining the Location

Begin by determining the locations available in your community for public meetings and programs.

- Are there free or low-cost meeting rooms?
- Are local businesses willing to provide space?
- Is the location convenient and acceptable to your intended audience?

Return to your goals and your intended audience to focus your location selection. Your format will also help determine the best location – size and privacy considerations. For example, if you are seeking to help older drivers transition into using public transportation before they can no longer safely drive, you may want to collaborate with AARP Mature Driver programs that already have designated locations.

Think of possible partners for the program. Senior Centers often like to plan trips, but to rent a bus can make the trip too expensive. Using public transit can keep costs down and be an advantage to the Center's program planning team. They may be able to provide a suitable venue, help with sustained publicity about the event, and thereby increase attendance.

What safe and comfortable space near convenient transportation or parking can you use for your program?

Consider personal safety in your choice of locations. Older people may be fearful of what they perceive as high-crime areas, of young people who may frequent a site, or of their own inability to navigate stairways. Avoid starting or ending programs during rush hour or when school-age children may be using transit.

The time of day and day of the week you hold your program can affect participation. Older drivers may only be comfortable attending programs during the day. However, evenings may be good times for families to drive older people to events, especially if intergenerational participation is desired. Adult children of older individuals may be informal caregivers, potentially responsible for their parents' future transportation or driving decisions.

Take into account religious observances during the week. For example, among some denominations, Wednesday night is reserved for religious study or family services or Saturdays for celebrating services.

Some location ideas for travel training programs:

- Senior centers / recreation or community centers
- Continuing-care communities or other housing sites with a large older population

- Civic groups (these may include clubs that own facilities such as Elks, Veterans of Foreign Wars (VFW) posts, Moose lodges, family associations)
- Hospitals or clinics, especially if they cater to an older population
- Religious and spiritual institutions
- Libraries
- Nutrition sites or popular restaurants
- Museums or other local transit attractions
- Community colleges or schools

If you wish to conduct one of the short 20 minute presentations, consider:

- Civic groups - you may seek an invitation to meetings and to present where those members congregate, such as at restaurants or houses of worship
- Community employers that may hire family members for older adults
- Houses of worship
- Senior Centers and nutrition sites
- Hospitals and clinics as part of their health education programs
- Sororities

### Step 3 Who: Identifying and Recruiting a Presenter

What groups or individuals in the community have expertise and interest in the content? Consider bus drivers, BART police officers, transit board members, or elected officials who use public transportation. Sometimes, several speakers from different areas can provide a comprehensive perspective, depending on the specific topic, content, and format of the presentation. For instance, a BART law-enforcement officer talking about safety and a driver can complement each other in delivering some of the material effectively.

Three key criteria for selecting speakers:

- Expertise with the content
- Ability to convey material in an interesting manner
- Willingness to participate and to help promote the program

Are your speakers appropriate for culturally diverse populations? Try to find speakers who are either from the targeted culture or who know the language. At the least, they should have knowledge of or experience with the community. Ignorance of cultural and community differences can negatively affect programs. In contrast, incorporating knowledge about the culture or community into programs increases the potential for success.

## Step 4 How: Publicizing the Program

What resources do you have to advertise and produce this program or campaign?

Here are some steps to consider:

- Develop a budget, including the costs of advertising, rentals, food, speaker(s) and other incidentals. Does your final proposed budget support your goals for the program?
- Advertise in the local newspapers. You may not have the budget for a full-page advertisement, but local newspapers often offer short announcements in the main section of the paper as a public service.
- Contact the local newspaper and speak with an editor or reporter. See if anyone is assigned to the “age beat.” Try to increase their awareness of the issues surrounding older adults and mobility. Speak to the reporter about writing a general- or human-interest story around the topic, highlighting your program. Have events included in community events or bulletin board sections.
- Contribute information to the local cable station that can result in a posting on the station’s community bulletin board listing.
- Contact community cable and radio stations for inclusion on event announcements or for talk show or news interviews.
- Design one-page flyers and distribute them in locations frequented by your target audience. Consider local pharmacies, clinics, senior centers, laundromats, barber shops and beauty salons, retirement homes, or continuing-care centers. You can also ask them to cosponsor your program or event.
- Work with your partners to assist in the program promotion.
- To advertise your program, use the resources of other health- and aging-related agencies, such as area agencies on aging, health departments, and hospitals.

You can execute a low-cost publicity effort to notify individuals and groups of your program and intended audience. Five levels of promotion are:

- Using word-of-mouth (least costly)
- Pitching the program in newsletters
- Contacting the local media (more time consuming)
- Distributing flyers (moderate cost and moderate time involvement)

### Using Word-of-Mouth

1. Contact past participants in older-adult programs, such as:
  - Health-promotion program attendees
  - Nutrition-site participants and meals-on-wheels volunteers

- Arts and recreation class members
  - Fitness class participants
  - Tax aid program participants
2. Make announcements at all your organization's events.
  3. Offer incentives such as lunches, free trips or discounts to local attractions. This has proved one of the most successful attractors in gaining participation.

## **Pitching the Program in Newsletters**

1. Identify relevant newsletter sources:
  - Hospitals or HMOs
  - Pharmacies
  - Chiropractors
  - Senior centers
  - Civic organizations (e.g., Rotary Club, Kiwanis Club)
  - Religious groups
  - Retirement communities
  - Health clubs
  - Older-adult organizations, such as local chapters of the Older Women's League or Gray Panthers
  - Advocacy groups such as the NAACP; La Raza; lesbian, gay, bisexual and transgender (LGBT) advocacy or social groups
2. Contact the organization's leader, minister, priest, or information director to secure a commitment to include the information in one of their newsletters or bulletins or from the pulpit.
3. Create a brief news story of 150 to 200 words that newsletter editors can insert into their publication. Be sure to include the topic, speaker, place, time, and contact information.

## **Contacting the Local Media**

1. Create a list of local print and broadcast media, using the telephone directory or other community listings as a starting point. Include the following information:
  - Type of media
  - Name of publication or broadcasting station
  - Contact names, including the appropriate reporter or editor (obtained by calling each media outlet)

- Section of the paper (lifestyles, health, or community section or a special older-adult insert)
  - Addresses
  - Phone/fax numbers
  - E-mail addresses
  - An explanation of how specific news outlets prefer to receive media advisory and other news release: fax, e-mail, or other.
2. Develop strategies for media in your community to sell the impact of public transit riding on older adults from driver safety to avoiding isolation, such as:
    - How do aging and mobility affect older adults in your community?
    - How do aging and mobility affect the health of your community?
    - How are family members affected? Does that affect business and employers?
    - What is the urgency for the reporter coming to this program now?

Collect “hard data” on the issue. Use reliable sources such as the National Highway Traffic Safety Administration or the Centers for Disease Control and Prevention, and reference the information or statistics. Reliable sources and references boost your credibility.

3. Mail or fax an announcement for the weekly calendar and media advisory to the appropriate reporters/editors at the local radio and TV stations, as well as newspapers, magazines, and community organization newsletters.
4. Follow up with a phone call to confirm receipt of the notices and to encourage media outlets to broadcast or publish the information.

## **Distributing Flyers**

1. Develop a flyer outlining the following:
  - Location
  - Time and date
  - Presenter information
  - Brief description of what will be covered
  - Invite participation such as “let your voice be heard”
  - Incentives for participation
  - Sponsoring groups
2. Determine the best locations to promote your program, by mail or hand delivery, such as:

- AARP chapters
- Local Area Agencies on Aging
- Cooperative Extension Offices
- Departments of Motor Vehicles
- Hospitals and health clinics
- Senior centers, older-adult clubs, and retirement groups
- Libraries, schools, colleges, local bookstores
- Pharmacies
- Physician offices and clinics catering to older adults
- Churches, synagogues, mosques, temples
- Civic groups and local businesses such as barbershops
- Laundromats and grocery stores
- YMCAs and YWCAs
- Restaurants frequented by older adults
- Nutrition sites
- Housing sites

## Step 5 How: Coordinating the Program

### **Developing an Action Plan and Timeline**

In your initial planning include goal setting, budgeting, and developing an action plan. An action plan and timeline lists tasks and identifies who is responsible to do what by when. It is a good way to keep track of the multiple steps carried out by many people for a successful program. Use the action plan and timeline at program meetings with your organization, volunteers and partners to help run your meetings efficiently. Establishing expectations helps to avoid misunderstandings.

General tasks for coordinating a successful program can include:

- Determine the location
- Confirm speaker(s)
- Determine speaker needs for audiovisual equipment and handouts
- Secure audiovisual equipment
- Obtain additional informational materials for distribution
- Make arrangements for refreshments
- Locate wheelchair-accessible areas

- Plan room setups
- Check the heating/cooling and lighting systems

## **Registration**

Let your registration form serve as a multi-purpose tool. You can gather contact information about participants, assess their travel skills and develop a commitment from the participant to attend the sessions. A suggested registration form is included in the Handouts and Forms section of the manual.

## **Step 6 How Well: Evaluation and Follow-Up**

### **How do you know you were successful?**

The goals you developed at the beginning of the planning process become your measuring stick for success. To know if you have successfully reached these objectives, set benchmarks indicating satisfactory levels of accomplishment. To determine when the program has reached these levels, you must measure your progress. Design your evaluation forms in concert with your goals.

To determine whether you were successful, divide your evaluation into three measurement areas:

- Exposure
- Effectiveness
- Cost-effectiveness

### **Exposure**

Did you meet your projection for number of attendees?

Did the program get adequate exposure?

Your evaluation should answer questions such as:

- Where were the announcements placed?
- Where did participants hear about the program?
- Did families and partners respond to the publicity?
- How many personal contacts were made?

### **Effectiveness**

Was the program effective in achieving your goals?

- Consider informally testing the level of knowledge about trip planning using public transportation prior to conducting your program. You can follow up with a second test following the program.
- Note whether participants ask for additional information or programs, and/or ask questions of the speaker.
- Ask participants to complete an evaluation at the close of your training session.
- Follow up at a later time with participants to determine how they used the information.

## **Cost Effectiveness**

Did the program's cost in time and resources provide enough benefit to satisfy the community, funders, and your organization?

The ideal benefit from the program would be increased transit use by the majority of attendees. This sort of evaluation, involving in-depth, long-term research, is expensive and remains outside the financial capabilities of most community organizations, unless you have close ties with university research departments or organizations funded to conduct this research. If so, they may be interested in helping you measure the effectiveness of your programs.

Despite these evaluation challenges, documenting the cost-benefit outcomes of a program results in better planning for the next project, and may in fact be required for continued outside funding.

Examples of participant and program coordinator post-training evaluations along with a follow-up evaluation can be found in the manual's Handouts and Forms section.

Sample evaluation forms include:

1. Final Program Coordinator Evaluation Worksheet
2. Participant Evaluation
3. Protocol for Follow-up Telephone Interviews

# Chapter 3. Classroom Training— Overview and Background

## Chapter Overview

This chapter contains the following sections:

- 1. Introduction to Classroom Training**
  - Goals and Objectives
  - Background for Trainers
- 2. Preparing for the Classroom Training Event: A Checklist**
- 3. Outline of Classroom Training**

## Introduction to Classroom Training

### Goals and Objectives

The goals and objectives of classroom training are to:

- Engage trainees in identifying travel skills that they already have, or would like to develop, and set specific goals
- Assist trainees to consider barriers when traveling on transit, generate confidence in problem-solving and planning for overcoming barriers,
- Review key transit and personal safety precautions
- Understand personal rights to using transit and encourage self-advocacy including making requests and seeking recourse when assistance is required.
- Provide basic knowledge about bus travel and specific information related to the transit systems in Alameda County. Topics include:
  - Overview of transit service areas and fares
  - Reading system maps, route maps, schedules
  - Using transfers
  - Trouble-shooting when things don't go as planned
  - Finding printed transit information, web-based information, customer service assistance.
- Increase confidence by providing tools to use in unknown situations

## **Background for Trainers**

Each classroom training module in this manual will cover the following topics:

- Travel Skills Identification
- Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy
- System Knowledge and Trip Planning
- When Things Don't Go As Planned

Background information related to each of these areas is provided below.

### **Travel Skill Identification and Goal-setting**

Each module guides you through exercises to identify the skill set of individual trainees and the group as a whole prior to training, so that you can incorporate and build on those skills within the training. This also gives trainees the opportunity to recognize the skills they already have that will be of use in using public transit.

The discussion of goals gives trainees a chance to identify specific, individual goals for the training. Trainees' individual goals may relate to trips that the trainee would like to take using transit in the future, or to specific skills or knowledge trainees would like to gain in order to them to more effectively use transit.

As part of the goal-setting session, it is important to discuss why trainees are interested in using public transit. Motivators may include: desire to be independent, traveling to a job or activity, freedom, or feelings of being included in the community. Some individuals attending travel training may lack the motivation needed to travel by bus or rail. They may be seeking assistance due to loss of driver's license, a move, or loss of current means of transportation (i.e. death of a spouse, other means of transportation no longer available due to finances). For these individuals, the trainer may want to take the opportunity to discuss the positive aspects of independent mobility, renewed independence, and the opportunity to meet new people or go new places.

### **Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy**

Barrier analysis involves evaluating a transit trip for potential obstacles that may inhibit the rider from effectively using transit. Barriers may be environmental, physical, or social. Barrier analysis can be used by trainees as part of trip planning to identify and understand potential barriers, and to identify potential solutions. (Please note that while these topics are included as part of the classroom training scripts provided in Chapter 4, trainers may wish to shift discussion of "tips for trips" to the field training component, or otherwise tailor this section to meet the needs of trainees.)

### **Environmental barriers**

Environmental barriers may exist in a trainee's path of travel and should be identified to ensure a successful trip. The path of travel is defined as origin to destination, including but not limited to: crosswalks, sidewalk to the bus stop or rail station, bus stop or station, the transit vehicle, sidewalk to the destination, and the destination itself. Sometimes the route itself may be the biggest deterrent to traveling independently: the trainee may live too far from a transit line or the location of the bus stop or rail station might be in an unsafe place.

Other factors trainees will want to consider are:

- Amount of walking required for the trip
- Length of trip
- Number of transfers
- Weather and climate—heat, cold, and rain

### **Physical and Social Barriers**

Physical barriers may include but are not limited to: vision, hearing, mobility, speech, health concerns, or stamina. In order to comfortably complete a transit trip, trainees may need to evaluate their stamina, the terrain of the path of travel, and availability of rest stops as part of trip planning. The environment in which travel occurs includes people as well as other physical obstacles, and social barriers may be closely related to physical barriers. For some trainees, a social barrier may involve discomfort experienced while traveling at peak periods, such as rush hour, or when school lets out in the afternoon. Some of this discomfort may relate to traveling on crowded vehicles, when the trainee may feel rushed, or have to be more assertive to get a seat, and some may relate to negative perceptions of other riders.

### **Safety**

The safety training component includes guidance and tips for safe use of transit systems, and as well as guidance related to behaviors promoting personal safety when using transit. The training also includes discussion of self-advocacy, including the trainee's right to speak up for him/herself and to seek assistance when necessary. Please note that increasing concerns about safety issues that are unlikely to occur can be an unintended outcome of discussion of safe travel. Trainers should be aware of this potential pitfall and tailor their approach accordingly to meet the needs of their audience. For example, trainers may choose to cover some safety topics during the field training, or provide basic safety information and then allow audience members to raise questions regarding more specific safety concerns.

### **System Knowledge**

The System Knowledge section consists of discussions, exercises, and a PowerPoint presentation intended to give participants an overview of the transit system(s), planning a trip using maps and schedules, and some of the key features of transit vehicles. Sample trip

planning exercises are included; however, trainers are encouraged to substitute transit routes, origins, and destinations that are relevant to the trainees' local area or travel goals in order to tailor the training to trainees' interests and needs. It is important that trainers be very familiar with the system maps and schedules being used, as variation in symbols and formats from agency to agency can create confusion for trainees and trainers alike.

Trainers may tailor this component of the training to meet trainees' level of experience. Many of the trainees may have ridden buses or trains at some point in their lives. Yet, some may never have ridden transit and therefore will need to know basic facts about riding that we may take for granted, such as the need to use exact change to pay their bus fare, or the fact that some buses operate on "limited" or express routes and therefore may not stop at every bus stop.

During the trip planning exercise, it is important to remember that even seasoned riders can have difficulties reading a transit schedule, in particular if it's for an unfamiliar route. While schedules provide essential information to riders, they often need to convey a lot of information on one sheet of paper, thus contributing to confusion to the reader. (Likewise, bus destination signs, bus stop signs, and signage in rail stations can be confusing to the novice rider if not legible from a distance.) You may want to highlight relevant columns on schedules for use during trip planning exercises. A large-screen projection of transit route maps and schedules can also be a useful aid during the exercise. In order to orient trainees to internet-based trip planning resources, a live demonstration can be paired with providing a hand-out with relevant URLs and screenshots to assist trainees in accessing websites in the future.

For trainings in South and East County in particular, the System Knowledge training component is a good opportunity to talk with trainees about the challenges of traveling in areas with less transit service coverage and reduced frequency. In such areas, trip planning is particularly important. Trainees should be aware that there could be an hour or more gap between buses, and that transfers between buses may take longer in areas with less transit service.

Pair novices with more experienced riders for peer sharing during System Knowledge exercises. The interaction will allow trainees to discover the information without relying entirely on the trainers and improve retention of the material.

Prepare for this discussion by providing each participant with:

- A system map (or equivalent) for the bus system or BART
- Schedule(s) for a specific bus route(s) discussed in the trip planning component (a local route if session is geographically focused), or a schedule for the BART line(s) that is the focus of trip planning
- Magnifiers available through AC Transit

In addition, as discussed above, consider using large-screen projections of route maps and pocket timetables during trip planning exercises.

The field training component will involve other important aspects of system knowledge, including identifying bus stops, navigating rail stations, the features of vehicles (e.g. steps, kneelers), fare payment, priority seating for seniors, and signaling for a stop, as well as reinforce lessons learned from classroom trip planning training. Please see Chapter 5 for more information on field training.

### **When Things Don't Go as Planned**

Sometimes, even when all proper procedures are taken, a confusing, difficult or dangerous situation may occur. It is important to prepare the trainee for this possibility and practice techniques to be used, while emphasizing that trip planning will reduce the likelihood of such situations occurring. As with the barrier analysis and safety components of the training, a section on this topic is included in the classroom training scripts presented in Chapter 4, though trainers may choose to address this topic during field training.

Problems that are likely to occur may stem from a trainee's mistake (arriving late at a bus stop, or boarding the wrong bus) or external factors (re-routing of a bus, or the bus breaks down). Whatever the source of the problem, the participant needs to know how to deal with the unexpected. Problems happening during the training period present a good opportunity for travel trainers to work with trainees on problem-solving techniques.

Dealing with assorted problems that can occur during transit trips requires making judgments as well as generalizing from the information you have at hand. By experiencing a variety of learning situations and environments, the goal is for the trainee to have the ability to transfer knowledge to new or unfamiliar areas, situations and environments.

## **Preparing for the Training Event**

As discussed in Chapter 2, in advance of the training day, you will have made a variety of arrangements related to the facility where the training is to be held, room set-up, audiovisual equipment, refreshments, handouts (both forms and transit agency information), and other supplies and equipment.

The following is a checklist of basic items that should be in place for the day of the training event (*Note: Please see Appendix 5 for a detailed Pre-Training Checklist*):

- Room is set up appropriately, in a way that encourages collaboration and discussion among participants (e.g. a small group configuration around tables will likely be more successful than a "classroom" set-up, with rows of chairs all facing the speaker)
  - Room is a comfortable temperature and lighting is adequate
- Handouts and printed materials:

- Forms and handouts to be used in training, including participant workbook
- Transit agency public information—schedules, maps, brochures for each agency being covered in training
  - Schedules/maps may be pre-highlighted to facilitate trip planning exercises
  - Brochure/application for the Regional Transit Connection Discount ID card, if desired
- Hard copies of PowerPoint presentations for the transit system(s) discussed during the training event
- Audiovisual equipment:
  - Computer, with PowerPoint presentation(s) loaded
  - Projector
  - Screen or surface to project onto
  - Amplification (microphone), if being used
- Other supplies and props:
  - Magnifiers (for reading schedules, transit agency information)
  - Flip charts
  - Markers
  - Blackboard or white board, if needed
  - Other items, such as a sample of AC Transit “flash cards”
  - Name tags for trainers and participants
- Refreshments

## Outline of Classroom Training

Each of the classroom training modules presented in Chapter 4 follows the format outlined below. This outline is also provided in Appendix 1 as a standalone document.

- 1. Trainer Introductions and Welcome**
- 2. Review agenda and goals for the classroom session**
  - a. Order of events
  - b. Breaks
- 3. Housekeeping—location of restrooms, refreshments, etc.**
- 4. Travel Skills Identification**
  - a. Short “interview” in trainee pairs and group debrief
  - b. Group brainstorm—travel skills needed when riding public transit

## **5. Participant Goal-setting**

- a. Brainstorming session documented on flip charts

## **6. Tips for Trips: Barrier Analysis, Safety and Self-Advocacy**

- a. Overview of potential barriers and suggestions for overcoming them
- b. Group problem-solving for scenarios involving potential barriers (facilitator-led)
- c. Safety tips

## **7. System Knowledge (Trip Planning)**

- a. Gathering Information for Trip Planning
- b. Transit Agency Overview—Q&A related to bus service frequency, hours of operation, weekday versus weekend service
- c. Reading a Map—Q&A related to transit system service area, distribution of services
- d. Overview of Fares and Passes
- e. Map Reading Exercise—Choosing the best route to use (partner and group exercise)
- f. Schedule Reading Exercise with Trip Planning Worksheet (group exercise)
- g. Transferring Between Buses and BART

## **8. PowerPoint Presentation**

- a. Bus Stops and Stop/Vehicle Signage
- b. Getting on the Bus
- c. Fares
- d. Signaling For a Stop
- e. Safety

## **9. When Things Don't Go as Planned**

- a. Missing the Bus
- b. Missing the Destination Stop
- c. Boarding the Wrong Bus
- d. Becoming Lost or Off-Track



## Chapter 4. Classroom Training Modules

### Chapter Overview

In this chapter you will find a series of modules giving tips for presentations and providing you with an easy-to-follow script. The script offers you suggested wording, but ideally when you feel comfortable with your presentations, you will want to have the presentation flow in your own words.

This chapter contains the following classroom training scripts:

- Module 1: AC Transit
- Module 2: Wheels
- Module 3: Union City Transit
- Module 4: BART

## Module 1: Classroom Training for AC Transit

This module is geared to the first time bus riders, those who have used other bus systems or those who have not used transit in many years. The module will cover

- Travel skills identification
- Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy
- System Knowledge
- When Things Don't Go As Planned

This module is designed to fit within a two-hour period of instruction. Suggested timeframes for each component of the classroom training are provided. However, trainers may choose to use different timeframes depending on the needs of trainees.

### **Script: Module 1**

#### **Travel Skills Identification, Motivations and Goal-Setting (Time: 20 minutes)**

**Facilitator:** Before we begin learning about using public transit, let's find out what kind of experience the group has had with public transit in the past. I'd like to have everyone pair up with someone sitting near them. I'm going to ask you each to do a short "interview" of that person. We have a few questions to get you started.

*Sample questions for trainees can be provided on a handout, or written on a flip chart and posted in the training room:*

**Q1:** Why did you decide to come to this training today?

**Q2:** How do you currently get around? Have you taken a ride on a bus before, anytime in the past?

**Q3:** What advice would you give to a friend who is new to using the bus?

**Q4:** Are there particular things about riding a bus that can be confusing for first-time—or even regular—riders?

*After both individuals have finished interviewing the other, you may choose to ask some or all of the questions above of the group as a whole, asking for volunteers to respond, so that the group can benefit from hearing the responses of others.*

**Facilitator:** Now let's do a short brainstorm as a group. What are some examples of the kinds of things do you need to be able to do, or you need to know about, to get around on the bus?

Prompt for facilitator—Sample skills may include:

- *Understanding how to pay the bus fare*
- *Reading and understanding schedules*
- *Figuring out which bus to take*
- *Making transfers between buses*
- *Problem-solving when things don't go as planned (for example, when you miss a bus, get on the wrong bus)*
- *Dealing with other bus riders*
- *Safety tips*

**Facilitator:** We'll be covering most/all of the topics you raised during this training. Now let's talk a little bit about what your goals are for this training.

*The group's responses to the questions below can be charted on flip charts at the front of the room. This validates respondents' contributions, and provides a visual list of goals that can be referred to throughout the training.*

**Q1:** Are there specific places where you would like to be able to travel using the bus?

**Q2:** Are there specific things about riding the bus you'd like to know more about?

### **Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy (Time: 20 minutes)**

**Facilitator:** In a few minutes, we're going to begin to learn about some of the specific things you need to know to get around by bus, but before we get started, I want to spend a few minutes talking about some tips that can help you to travel on transit safely and comfortably.

There are three main parts to any transit trip:

- Getting from your origin/home to the bus stop
- Catching, riding and alighting from the bus, or buses, if you're using more than one
- Getting from the bus stop to your destination

It can be easy focus just on the middle part—the part of the trip that takes place on the bus—but it's important to think about the whole trip when using transit.

Some things to think about when planning your bus trip include the following:

1. **The best route/path to take to the bus stop.** Some things to consider include:

- Does one route have more continuous or better quality sidewalks?
- Does one route avoid intersections that may be difficult to cross safely?

- Is one route a lot steeper than others?
  - Is the stop to which you are going in a well-traveled area, with lots of pedestrians, lighting, etc. nearby?
2. **Your stamina.** You probably will have to do some walking both at the beginning and at the end of your bus trip.
- How long of a walk will you have on both ends of your bus trip?
  - How steep are the routes you will need to take?
  - Will you be carrying shopping bags, packages or other items?
  - Are there places to rest along the way if you need to?
  - Does your chosen stop have a bench/shelter (the transit agency may be able to provide this information)?
3. **The weather.** It may be a hot or a cold day, or it may be rainy.
- How should you dress to be most comfortable?
  - Do you need a hat, sunglasses, an umbrella, different shoes?
  - What else would make traveling in more extreme weather more comfortable?
4. **The time of day you will travel.** You *may* be more comfortable traveling when the bus system is less crowded.
- Busy times tend to be the weekday morning and evening rush hour periods, as well as the time after school dismissal in the afternoon. (The best travel times are between 10:00 a.m. and 2:00 p.m.)
5. **The length of the overall trip.**
- How much time will it take you to get from your home to your destination, and back to your home?
  - How many transfers will you need to make (if any)?

**Facilitator:** Using transit isn't always easy, and you may identify some potential barriers or challenges when thinking through your trip. The good news is that a lot of seeming barriers to using transit have potential solutions. Let's come up with a few solutions together.

**Q1. Let's say that you're planning a transit trip, and find that the walk from your house to the bus route serving your destination is too far to travel without resting. What might be a solution?**

A1. There may be a closer bus route the rider can use to connect to the route serving the destination

A2. There may be a park, or a café, or a friend's house along the way, where the rider could plan to take a short break to rest.

**Q2. Let's try another scenario. What are some things you can do if you want to make sure that you can get a seat on the bus?**

A1. The rider may want to plan their trip during off-peak hours, if possible. (Preferably between 10:00 a.m. and 2:00 p.m.)

A2. The rider should be encouraged to ask other riders and/or the driver to make a seat available in the priority seating area on the bus.

**Facilitator:** Before we move on, I'd also like to discuss safety. While it is rare for injuries or crime to occur on transit vehicles or in transit stations, there are a few basic things you can do to travel more safely.

The following are some tips for using transit safely:

- If possible, bring just the essentials with you on your transit trip, so that you can keep your hands free for holding on when boarding, alighting, and moving through the bus.
- Stay seated until the bus has come to a complete stop.
- Never cross the street in front of a bus. The bus driver may not know you are there, and may not be able to see you, or a car may be trying to pass the bus to make a turn and the car driver may not see you.
- Take your time when boarding and alighting. If you move more slowly than others, you may feel that you are inconveniencing the driver or other riders, but keep in mind that everyone needs a little extra time sometimes—for example, when loading a bicycle onto the rack on the front of the bus, when boarding with children, when carrying packages or luggage, etc. Take as much time as you need. Taking a seat near the door can help reduce the time needed to alight.
- When walking, always cross at a crosswalk or traffic light if possible.
- If walking at night, early in the morning, or late in the afternoon, wear bright clothing or reflective material to be more easily seen by drivers. Don't wear black or dark colors.

Here are a few more tips related to personal safety. When using transit, or walking to and from bus stops:

- Travel with confidence and purpose: stand tall, walk with your head up and be alert. Avoid giving the impression that you don't know where you are.
- Be aware of your surroundings
- Choose walking routes to and from bus stops that are well-lit and populated
- Plan your travel route before beginning your trip. Check out maps, street names, etc.
- Don't provide any personal information to strangers. The person you are talking to may be safe, but others who may overhear might not be.

- If you find yourself feeling uneasy or threatened while riding the bus, change seats and alert the bus driver if necessary.
- Ride towards the front of the bus, close to the driver, if possible.

## **System Knowledge (Time: 1 hour)**

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**Facilitator:** Today we're going to talk about **trip planning**, discuss how to **read a schedule**, the different kinds of **fares**, **when buses travel**, and how to **get on and off** the bus.

This is a lot of information, particularly for those of you who have not ridden a bus before. We don't expect you to remember all of this, but we think it will be helpful for you to have some knowledge before we do a field trip or before you go out on your own bus trip.

### **Gathering Information for Trip Planning**

Getting around on AC Transit is a lot easier if you've done some planning ahead of your trip. There are a few options available to you to help you with your planning. We've listed this information in your workbook.

1. You can call AC Transit at (510) 817-1717 or 511, and someone will be available between 7 a.m. and 7 p.m. Monday through Friday and between 9 a.m. and 5 p.m. on weekends, to help you plan your trip.
2. If you have access to the web, you can visit AC Transit's website at [www.ACTransit.org](http://www.ACTransit.org) or via [www.511.org](http://www.511.org).
3. You can use the AC Transit's System and Route Maps, and Bus Schedules
4. For hearing impaired persons, TDD: 800-448-9790.

Let's talk about how to use each of these.

### **Calling for AC Transit Travel Information:**

**Facilitator:** If you call the 511 line at the main menu say "AC Transit." You will be connected to the AC Transit submenu, at this menu say "Operator." This will transfer you to the AC Transit Information center and directly to a transit information representative.

AC Transit will provide step-by-step instructions, including transfers, stop locations and total travel time. It is important to have paper and pencil ready to take notes. Customer service representatives are available weekdays between 7:00 a.m. and 7:00 p.m. (After hours, recorded information can be accessed.) Customer service representatives can help plan trips on AC Transit. Before you call have the following information ready:

- Starting point address,
- Destination address and
- Arrival or departure time.

### Using AC Transit's Website

**Facilitator:** The Bay Area Regional Trip Planner provides a step-by-step itinerary that shows walking directions, stop amenities, bus line or lines to catch, transfer points (if you need to transfer) and total travel time. The web address is [www.ACTransit.org](http://www.ACTransit.org). There is a link to the trip planner on the home page. You can also access this information through the [www.511.org](http://www.511.org) website.

### AC Transit Overview

**Facilitator:** AC Transit has a number of different Rider Guides on specific topics. I'm distributing "Riding the Bus is Easy, and Accessible, too!" While some of the information is geared towards people with disabilities, a lot of it pertains to older riders as well. I have copies here for you to take home as a reference and a refresher for today's session.

Before we take a look at a map and plan a trip, I'd like to go over some general information with you about AC Transit's service.

Firstly, every AC Transit bus runs on a fixed route system and is scheduled to arrive at each bus stop at a designated time.

**Q1.** How often do you think AC Transit buses run?

A1. Different buses run on different schedules and frequencies. Buses on busier streets tend to run more often, so your wait time should be shorter. For example, in this neighborhood (state name), Line XX runs every XX minutes during the rush hour, whereas Line YY only runs every YY minutes.

The AC Transit system map lists all the routes as well as service frequency variations at each time of the day for both weekdays and weekends.

**Q2.** What is the difference between daytime and night time lines?

A2. Buses tend to run less often at night because there are fewer riders, and late at night some buses do not run at all. How many of you ride the buses after 10 P.M.?

*If no one rides at night you might suggest:*

If you are interested in the future about night service, you can ask for AC Transit for information on the All Nighter. For now, let's focus on your day routes.

*If someone does ride late at night:*

Since some of you are night riders, let's talk about a new service called the All Nighter. The service runs about every hour. This means you'll never be stranded at night in case of emergencies. For more information on the All Nighter, you can dial 511 on your phone and say "All Nighter."

A brochure which describes All Night Service is available for interested persons. (Show example).

**Q3.** What is the difference between weekday and weekend bus schedules?

A3. Some buses that run during the week may not run on the weekends, and those that run on weekends generally are less frequent. On holidays buses generally run on a weekend schedule, unless indicated otherwise on the AC Transit website.

AC Transit will also post notices about holiday bus schedule changes or any service changes on the bus.

### **Reading a Map**

*Ask trainees to pair up with someone else in the class, and to take out a copy of their system map.*

**Facilitator:** All of the bus routes in the AC Transit service area are shown in 4 individual maps that cover different geographic areas. Please take a look at your AC Transit Bus System and Street Map. We will look at the one for Oakland/Alameda. (Substitute a different map for different geographic area.)

You have a lot of information here on scheduling. We'll get to it in a minute. But let's turn to the side that has the map.

**Q1. Can you give me an idea of which areas are served by AC Transit?**

A1: Although Alameda County has the most bus service; the total service area is quite extensive. AC Transit actually provides service or connections into six different counties! As you can see, almost every part of north central and south Alameda County has bus service. Distances to bus stops in the hills may make it difficult for you to easily walk to your destination. For the rest of Alameda County, bus service is provided by Union City Transit in that city, and LAVTA provides service in east county. So you really can get all over the county by bus. How often the buses come and go and the limited service hours may be your only restriction in riding throughout the entire county.

**Q2. Do you have any ideas about which areas receive more frequent bus service? Why would that be?**

A2: Areas that have a lot more businesses or homes are more likely to have frequent service, as there are more people there who are likely to use the bus. So, for example, in downtown Oakland some buses run every ten minutes, especially during the day time hours, whereas in some of the more suburban areas of Fremont the bus may only come once an hour. You will see on the map that more bus lines serve downtown Oakland than Fremont. In downtown Oakland, you have more opportunities to transfer to different buses

and go to different parts of the county. The system map indicates the service frequency for each route by time of day, to help your trip planning decisions.

**Facilitator:** Before we talk about planning a trip, I also want to point out that the Bus System and Street Map also gives information about bus fares. There are special, reduced fares for riders who are 65 and older.

*Direct trainees to the “AC Transit Fares” section of the map and point out the column for “Seniors 65+ and Disabled.” You might also want to briefly mention the Regional Transit Connection Discount ID card, which can be used throughout the Bay Area. If trainees are new riders, be sure to let them know that exact change is required when paying a cash fare on a bus.*

### **Map Reading Exercise**

*Facilitators may want to highlight with a marker the sample route outlined below*

**Q1: Let’s say you live on the corner of Alcatraz and Racine Streets in North Oakland (point this location out on the map). And you want to go to the downtown Sears to do some shopping (show Sears on the map at Broadway and 20th Street) and then meet a friend for an early dinner. How would you decide which bus to take? Work with your fellow bus rider to try and come up with an answer, or to decide what more information you may need.**

A1: As you can see, you are a fairly short walk (about one long block) from the #1 or #1R on Telegraph Avenue and the #18 on Shattuck.

**Q2: How should you decide which one to take?**

A2: Since all of these lines pass within a block of Sears, it would depend on the bus schedule for these lines, and what time you want to leave.

**Q3: Let’s say it’s a Tuesday afternoon, and you will be ready to leave around 3:30 p.m. Which bus should you take?**

A3: To make this decision, you will need to turn over the handout and look at the bus schedules. At first this looks quite confusing, because there is a lot of information. But remember, the chances are you will only ever have to look at a few of the bus lines on this map, so you can concentrate on those. I have highlighted the information for #'s 1, 1R and 18 on your schedule. If you look across the row for #1, you will see that the bus frequency is given for the periods between 6 a.m. and 9am, 9 a.m. to 4 p.m., 4 p.m. and 7 p.m., and then after 7 p.m. Remember we said that buses will run more frequently during the hours when there are more riders, so that is why they need to break it up in this way.

**Q4: So, since you will be riding at 3:30 p.m., which is the period you will be looking at, and how often does the #1 bus run at that time? How about the # 1R?**

A4: Yes, the #1 runs every 20 minutes between 9 a.m. and 4 p.m., while the #1R runs every 12 minutes. So, if you were to arrive just after a #1 bus has left, you could wait up to 20 minutes for the next #1 bus, or a little longer if the bus is running late. However, since you can also take the #1R to your destination, your wait would likely be a lot less. You could now look and see what the frequency is for the #18. And you will find that at that time of day the #18 runs every 15 minutes.

**Q5: If you don't have a good book to read or you don't want to wait that long, what would you do next?**

A5: If you're planning your trip during day time hours, you could call 511 and ask the operator to tell you what time the bus is scheduled to stop near the corner of Alcatraz and Telegraph (for the #1 and #1R) and Alcatraz and Shattuck (for the #18). If there is a big difference between the two, you could decide to go to the one that is closer to the time you want, or if they are close together you could decide to the stop near Alcatraz and Shattuck, since that is a slight downhill walk and you may find it less tiring.

**Q6: Okay, now I'd like you to try and find your way back from downtown Oakland. Assume that your dinner will be finished around 7 and you'd be able to get to a stop around 7:15. But this time I want you to figure out which bus to take on your own, rather than with your traveling buddy. Which bus would you take?**

A6: You will notice that the #1R does not run after 7 p.m., so you'll have to choose between the #1 and #18. You'll see that both these routes run every 20 minutes, so you could take either one. However, in this situation you should probably call AC Transit Customer Service and ask them to tell you when either of these buses is expected to arrive at a stop near your dinner location. Since service is less frequent at this time of day, you should be sure to get to the stop at least five minutes early, because you would not want to miss that bus.

### **Schedule Reading Exercise (With Trip Planning Worksheet)**

**Facilitator:** As I mentioned before, you can get a lot of information from the System Map and Schedule that we just went through. However, if you want to have really specific information about when the bus runs in the area near your home, it is best to use the schedule for that route. AC Transit has route-specific schedules for every bus route in the system.

We've given you schedules for the bus routes we just discussed. We've also given you a Trip Planning Worksheet that you can use to keep track of information. If you take a look at the Worksheet, you'll see that there are places to fill in your starting point and destination, the time and day you want to travel, the route you will use, and times the bus is scheduled to pick you up and to arrive at your destination, and how much the trip will cost.

*Using schedules for bus #'s 1, 1R, and 18, go through a similar exercise to the previous one, emphasizing how you can now figure out the exact (within 5 minutes) time the bus*

*will be arriving at your closest stop. You can walk trainees through filling out the Trip Planning Worksheet as you go. However, make the point that this exercise would be a little more difficult if you did not live near one of the time points. If they need to know accurately when the bus will arrive and don't live near a time point, they may find it easiest to simply call 511.*

### **Transferring Between Buses and Bus and BART**

**Facilitator:** As I mentioned before, if you are going a fairly long distance, you may find yourself having to transfer to another AC Transit bus or even to another transit system. This should not be a problem if you do some trip planning ahead of time. If you know you need to transfer to another AC Transit bus, be sure to ask the driver for a transfer when you board the bus the first time. You will need to pay an additional \$0.25. If you will need to transfer from BART to a bus, you can get a transfer slip at the BART station that will give you a discount on your AC Transit fare. (The discount is \$.20 off the senior and disabled fare of \$.85.)

### **PowerPoint Presentation (30 minutes)**

We're now going to see a slide show which will explain a lot of the things you need to know about riding the bus. You will see quite a few slides showing the different types of buses. Don't worry about trying to remember what the names of the different buses are – I can assure you most riders on AC Transit have no clue about what kind of bus they are riding on. But we wanted you to see these pictures so that when we go out and do the field training the buses will at least be familiar to you. We'll practice how to read the bus sign or where to press the button when you want to get off when we do our field trip.

*Now turn to your power point presentation.*

(See Power Point Slides at the end of this section)

*After the presentation, continue as follows:*

**Facilitator:** What things in the slide show surprised you? How many of you had a handle on all the information? Even though we ended that slide show with a description of safety tips, in reality you are much safer on the bus than you may be walking around in some neighborhoods, and the possibility of something bad happening is very small.

### **When Things Don't Go as Planned (Time: 20 minutes)**

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**Facilitator:** We're going to talk about some unplanned situations that can come up and how you would deal with them.

#### **Missing the Bus**

**Q1. Buses run on a time schedule. In what situations are you likely to miss a bus?**

A1: If you arrive at the bus stop later than the scheduled arrival/departure time, if the bus is running ahead of schedule, or if you stand where the bus does not stop.

**Q2. If you miss the bus, what should you do?**

A2. First, you need to know when the next scheduled bus will arrive or if there is another bus (different route) that can take you to your destination within a reasonable time. Next, you will have to decide on whether to wait for the next bus or whether finding another form of transportation, such as BART or a taxi, is necessary.

**Missing the Destination Stop**

**Q1. If you realize you've ridden past your bus stop, what should you do?**

A1. Ask for assistance from the bus operator

**Facilitator:** Steps to follow when missing the stop are:

- Decide how far you traveled beyond your intended stop.
- If it's only a few blocks, or less, to the next stop, get off the bus and walk back.
- If the bus has gone several blocks before you've realized that the stop was missed, you should tell the operator what your destination is. You may be given the following options
  - Walk back
  - Ride to the end of the line and ride the return back to your stop
  - Buy a transfer, cross the street and take a bus in the opposite direction
- If you get off the bus and are confused, you should remain calm, locate the nearest intersection and then either use a cell phone if you have one or find a phone to call for assistance. Call 511 to ask for directions to return to your intended stop or destination.

**Boarding the Wrong Bus**

**Q1. What should you do if you have boarded the wrong bus?**

A1. If you realize that you boarded the wrong bus early in the route, you should use the same procedure described for missing a bus stop. Tell the operator what your destination is. The operator will give you information on how to get back to the stop. Use your schedule and find when the next scheduled bus will arrive or if there is another bus that can take you to your destination. Next, you will have to decide on whether to wait for the next bus and within a reasonable time or whether finding another form of transportation, such as BART or a taxi, is necessary.

### **Becoming Lost or Off-Track**

**Facilitator:** Becoming lost or off-track occurs when you are unexpectedly confused by an external influence. Generally, people realize they are off-track before they are completely lost. You know you are off track when the landmarks do not match with what you remember. The memories become more clear when you travel your route often. However, if you do become lost, you will need two pieces of information:

- The names of the streets at the nearest intersection where you are now.).
- The location of the nearest phone (cell phone, pay phone, local business, etc.)

## Module 2: Classroom Training for Wheels

This module will cover:

- Travel skills identification
- Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy
- System Knowledge
- When Things Don't Go As Planned

This module is designed to fit within a 90-minute period of instruction. Suggested timeframes for each component of the classroom training are provided. However, trainers may choose to use different timeframes depending on the needs of trainees.

### **Script: Module 2**

#### **Travel Skills Identification, Motivations and Goal-Setting (Time: 15 minutes)**

**Facilitator:** Before we begin learning about using public transit, let's find out what kind of experience the group has had with public transit in the past. I'd like to have everyone pair up with someone sitting near them. I'm going to ask you each to do a short "interview" of that person. We have a few questions to get you started.

*Sample questions for trainees can be provided on a handout, or written on a flip chart and posted in the training room:*

**Q1:** Why did you decide to come to this training today?

**Q2:** How do you currently get around? Have you taken a ride on a bus before, anytime in the past?

**Q3:** What advice would you give to a friend who is new to using the bus?

**Q4:** Are there particular things about riding a bus that can be confusing for first-time—or even regular—riders?

*After both individuals have finished interviewing the other, you may choose to ask some or all of the questions above of the group as a whole, asking for volunteers to respond, so that the group can benefit from hearing the responses of others.*

**Facilitator:** Now let's do a short brainstorm as a group. What are some examples of the kinds of things do you need to be able to do, or you need to know about, to get around on the bus?

Prompt for facilitator—Sample skills may include:

- *Understanding how to pay the bus fare*
- *Reading and understanding schedules*
- *Figuring out which bus to take*
- *Making transfers between buses*
- *Problem-solving when things don't go as planned (for example, when you miss a bus, get on the wrong bus)*
- *Dealing with other bus riders*
- *Safety tips*

**Facilitator:** We'll be covering most/all of the topics you raised during this training. Now let's talk a little bit about what your goals are for this training.

*The group's responses to the questions below can be charted on flip charts at the front of the room. This validates respondents' contributions, and provides a visual list of goals that can be referred to throughout the training.*

**Q1:** Are there specific places where you would like to be able to travel using the bus?

**Q2:** Are there specific things about riding the bus you'd like to know more about?

### **Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy (Time: 15 minutes)**

**Facilitator:** In a few minutes, we're going to begin to learn about some of the specific things you need to know to get around by bus, but before we get started, I want to spend a few minutes talking about some tips that can help you to travel on transit safely and comfortably.

There are three main parts to any transit trip:

- Getting from your origin/home to the bus stop
- Catching, riding and alighting from the bus, or buses, if you're using more than one
- Getting from the bus stop to your destination

It can be easy focus just on the middle part—the part of the trip that takes place on the bus—but it's important to think about the whole trip when using transit.

Some things to think about when planning your bus trip include the following:

6. **The best route/path to take to the bus stop.** Some things to consider include:

- Does one route have more continuous or better quality sidewalks?
- Does one route avoid intersections that may be difficult to cross safely?

- Is one route a lot steeper than others?
  - Is the stop to which you are going in a well-traveled area, with lots of pedestrians, lighting, etc. nearby?
7. **Your stamina.** You probably will have to do some walking both at the beginning and at the end of your bus trip.
- How long of a walk will you have on both ends of your bus trip?
  - How steep are the routes you will need to take?
  - Will you be carrying shopping bags, packages or other items?
  - Are there places to rest along the way if you need to?
  - Does your chosen stop have a bench/shelter?
8. **The weather.** It may be a hot or a cold day, or it may be rainy.
- How should you dress to be most comfortable?
  - Do you need a hat, sunglasses, an umbrella, different shoes?
  - What else would make traveling in more extreme weather more comfortable?
9. **The time of day you will travel.** You *may* be more comfortable traveling when the bus system is less crowded.
- Busy times tend to be the weekday morning and evening rush hour periods, as well as the time after school dismissal in the afternoon. (The best travel times are between 10:00 a.m. and 2:00 p.m.)
- 10. The length of the overall trip.**
- How much time will it take you to get from your home to your destination, and back to your home?
  - How many transfers will you need to make (if any)?

**Facilitator:** Using transit isn't always easy, and you may identify some potential barriers or challenges when thinking through your trip. The good news is that a lot of seeming barriers to using transit have potential solutions. Let's come up with a few solutions together.

**Q1. Let's say that you're planning a transit trip, and find that the walk from your house to the bus route serving your destination is too far to travel without resting. What might be a solution?**

A1. There may be a closer bus route the rider can use to connect to the route serving the destination

A2. There may be a park, or a café, or a friend's house along the way, where the rider could plan to take a short break to rest.

**Q2. Let's try another scenario. What are some things you can do if you want to make sure that you can get a seat on the bus?**

A1. The rider may want to plan their trip during off-peak hours, if possible. (Preferably between 10:00 a.m. and 2:00 p.m.)

A2. The rider should be encouraged to ask other riders and/or the driver to make a seat available in the priority seating area on the bus.

**Facilitator:** Before we move on, I'd also like to discuss safety. While it is rare for injuries or crime to occur on transit vehicles or in transit stations, there are a few basic things you can do to travel more safely.

The following are some tips for using transit safely:

- If possible, bring just the essentials with you on your transit trip, so that you can keep your hands free for holding on when boarding, alighting, and moving through the bus.
- Stay seated until the bus has come to a complete stop.
- Never cross the street in front of a bus. The bus driver may not know you are there, and may not be able to see you, or a car may be trying to pass the bus to make a turn and the car driver may not see you.
- Take your time when boarding and alighting. If you move more slowly than others, you may feel that you are inconveniencing the driver or other riders, but keep in mind that everyone needs a little extra time sometimes—for example, when loading a bicycle onto the rack on the front of the bus, when boarding with children, when carrying packages or luggage, etc. Take as much time as you need.
- When walking, always cross at a crosswalk or traffic light if possible.
- If walking at night, early in the morning, or late in the afternoon, wear bright clothing or reflective material to be more easily seen by drivers. Don't wear black or dark colors.

Here are a few more tips related to personal safety. When using transit, or walking to and from bus stops:

- Travel with confidence and purpose: stand tall, walk with your head up and be alert. Avoid giving the impression that you don't know where you are.
- Be aware of your surroundings
- Choose walking routes to and from bus stops that are well-lit and populated
- Plan your travel route before beginning your trip. Check out maps, street names, etc.
- Don't provide any personal information to strangers. The person you are talking to may be safe, but others who may overhear might not be.

- If you find yourself feeling uneasy or threatened while riding the bus, change seats and alert the bus driver if necessary.
- Ride towards the front of the bus, close to the driver, if possible.

### **System Knowledge (Time: 45 minutes)**

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**Facilitator:** Today we're going to talk about **trip planning**, discuss how to **read a schedule**, the different kinds of **fares**, **when buses travel**, and how to **get on and off** the bus.

This is a lot of information, particularly for those of you who have not ridden a bus before. We don't expect you to remember all of this, but we think it will be helpful for you to have some knowledge before we do a field trip or before you go out on your own bus trip.

### **Gathering Information for Trip Planning**

Getting around on Wheels is a lot easier if you've done some planning ahead of your trip. There are a few options available to you to help you with your planning. We've listed this information in your workbook.

1. You can call Wheels Customer Service at (925) 455-7500, between the hours of 5:00 a.m.-6:30 p.m. Monday through Friday, or 10:00 a.m.-4:30 p.m. on Saturdays. After hours, you can still call this number and speak with a dispatcher, though you will get more limited information than if you call during the business day and speak to a customer service representative. You can also call 511 and say "Transit" and then "Wheels."
2. If you have access to the web, you can visit Wheels website at [www.wheelsbus.com](http://www.wheelsbus.com) or via [www.511.org](http://www.511.org).
3. You can use the Wheels Bus Book, System Map, and individual route schedules.

Let's talk about how to use each of these.

### **Calling for Wheels Travel Information:**

**Facilitator:** If you call the Wheels information line, you call will be answered by a Wheels representative who can help you plan your trip.

The representative can provide step-by-step instructions, including transfers and total travel time. It is important to have paper and pencil ready to take notes. Customer service representatives are available weekdays between 5:00 a.m. and 6:30 p.m., and Saturdays from 10:00 a.m. to 4:30 p.m. If you call this line after hours, you will reach a Wheels dispatcher. Before you call have the following information ready:

- Starting point address,
- Destination address and
- Arrival or departure time.

## Using the Wheels Website

**Facilitator:** The Wheels website provides bus schedule and fare information, maps, and other information about Wheels services. The web address is [www.wheelsbus.com](http://www.wheelsbus.com). You can also access this information through the [www.511.org](http://www.511.org) website.

## Wheels Overview

**Facilitator:** Wheels has a Bus Book that brings together a lot of the information you need to plan your trip. We've provided each of you with a copy. In the front of the Bus Book, there is a lot of useful background information about riding Wheels. The Bus Book also has all the bus schedules for Wheels routes, and individual route maps. In the middle of the Bus Book is a fold-out map showing all Wheels routes.

Before we take a look at a map and plan a trip, I'd like to go over some general information with you about Wheels service.

Firstly, every Wheels bus runs according to a timetable, and is scheduled to arrive at each bus stop at a designated time.

**Q1.** How often do you think Wheels buses run?

A1. Different buses run on different schedules and frequencies. Routes that run on busier streets, or that connect areas where a lot of people travel, tend to run more frequently. For example, buses on Wheels route 10, which travels between Livermore and Pleasanton, run every 15 or 20 minutes, while buses in other areas run much less frequently. On some Wheels routes, there is an hour or more between buses. Because of this gap between buses, it's important to plan ahead so you don't have to wait a long time at a bus stop for a bus to arrive.

**Q2.** What is the difference between daytime and night time lines?

A2. Buses tend to run less often at night because there are fewer riders, and some buses do not run at all.

**Q3.** What is the difference between weekday and weekend bus schedules?

A3. Some buses that run during the week may not run on the weekends, and those that run generally are less frequent. On holidays buses generally run on a weekend schedule.

On the inside cover of the Wheels Bus Book, you'll find a list of holidays, and information about what kind of service will run on those days.

## Reading a Map

*Ask trainees to pair up with someone else in the class, and refer to the system map.*

**Facilitator:** Please take a look at your Wheels system map.

**Q1. Can you give me an idea of which areas are served by Wheels?**

A1: The service area is quite extensive. As you can see, Wheels routes travel throughout Dublin, Pleasanton, and Livermore areas. In the rest of Alameda County, bus service is provided by AC Transit in North, Central, and South County, and by Union City Transit in that city. So you really can get all over the county by bus. How often the buses come and go and the limited service hours may be your only restriction in riding throughout the entire county.

**Q2. Do you have any ideas about which areas receive more frequent bus service? Why would that be?**

A2: Areas that have a lot more businesses, homes, or transit connections are more likely to have frequent service, as there are more people there who are likely to use the bus. You can see on the map that many Wheels bus lines serve the Dublin/Pleasanton BART station. In other areas, there may be only one bus route, with relatively limited service.

**Facilitator:** Before we talk about planning a trip, I also want to point out that the Bus Book also gives information about bus fares. There are special, reduced fares for riders who are 65 and older. One benefit of riding Wheels is that anyone 65 years or older can ride free between 9:00 a.m. and 2:00 p.m. Monday through Friday, when the bus system is less busy.

*Direct trainees to the “Fares” page of the Bus Book, and point out the senior cash fare and monthly pass. You might also want to briefly mention the Regional Transit Connection Discount ID card, which can be used throughout the Bay Area. If trainees are new riders, be sure to let them know that exact change is required when paying a cash fare on a bus.*

**Map and Schedule Reading Exercise**

*Facilitators may want to highlight with a marker the trip origin and destination in the exercise below, as well as relevant columns on bus schedules.*

**Q1: Let’s say you’re beginning your trip at Ridge View Commons on Case Avenue in Pleasanton, and want to travel to the Kaiser Medical Offices in Pleasanton for a 1:00 p.m. appointment on a Tuesday afternoon.**

*Point out both of these points on the system map.*

**How would you decide which bus to take? Work with your fellow bus rider to try and come up with an answer, or to decide what more information you may need.**

A1: As you can see, no routes directly connect Case Avenue to the Kaiser Medical Offices, but according to the system map, several routes could be used to connect from Route 8 to the area near the Kaiser Offices.

**Q2: How should you decide which one to take?**

A2: By looking at the schedules for each route, you can rule out some options right away. For example, all of the gold colored routes (labeled 601 and higher) are school routes, and only have one or two trips each day at school starting and ending times. Routes 53 and 3V also travel near the Kaiser Offices, but if you check the schedules for each, you'll see that they do not run during the early afternoon period. So transferring from Route 8 to Route 10 will be the best option for reaching the Kaiser Offices directly at that time of day.

**Q3: Let's start planning the trip by looking at the Route 10 schedule. If you look at the map for Route 10 on page 27 of the Bus Book, you'll see that key timepoints are marked with a letter in a black circle. These match the columns on the bus schedule. Letter "I" at the Stoneridge Mall is the closest timepoint to the Kaiser Offices, so we'll use that to select the best trip to take on Route 10 to arrive by 1:00 p.m. If you turn back to the bus schedule on page 29 (Westbound #10 to Stoneridge), can you tell me which arrival time would work best for this trip?**

A3: There are two arrivals at the Stoneridge Mall that could work—one at 12:30 p.m., and one at 1:00 p.m. You can expect to arrive at Kaiser a few minutes earlier since the Kaiser Offices come earlier in the route than the Stoneridge Mall. Since the 1:00 p.m. arrival may cut it too close to make it to your appointment on time, we'll plan a trip that allows us to arrive at the Kaiser Offices around 12:30 p.m.

**Q4: For this trip, we'll be transferring to Route 10 at the Dublin BART station. Can you tell me what time we'll need to arrive at the Dublin BART station in order to board the bus that arrives at Stoneridge Mall at 12:30 p.m.**

A4: We'll need to make sure we arrive at the Dublin BART station in time to board the trip that departs at 12:14 p.m.

**Q5: Now let's look at the schedule for Route 8. This schedule is set up a little differently, so I've highlighted the columns you want to look at. What time will we need to start our trip at Case Avenue if we want to arrive at the Dublin BART station in time to board the Route 10 bus by 12:14 p.m.?**

A5: Yes, we could take the Route 8 bus that stops on Case Avenue at 11:50 p.m. and arrives at the BART station at 12:08 p.m. This will leave over 5 minutes to locate and transfer to the Route 10 bus that will take you to the Kaiser Offices.

**Schedule Reading Exercise (With Trip Planning Worksheet)**

**Facilitator:** Now we're going to plan the bus trip back from the Kaiser Offices. This time we're going to use a Trip Planning Worksheet that you can use to keep track of information when planning a trip. If you take a look at the Worksheet, you'll see that there are places to fill in your starting point and destination, the time and day you want to travel, the route

you will use, and times the bus is scheduled to pick you up and to arrive at your destination, and how much the trip will cost.

We're going to assume that you want to leave the Kaiser Offices around 3:15 p.m. to return to Case Avenue.

*Using schedules for Routes 8 and 10, go through a similar exercise to the previous one for the return trip. It will be important to note that trainees will want to refer to the Eastbound East Avenue schedule for Route 10 for the return trip. The suggested "correct" return trip is the Route 10 trip departing from the Stoneridge Mall at 3:20 p.m., arriving at the BART station at 3:36 p.m., followed by a transfer to the Route 8 trip departing from the BART station at 3:44 p.m. and arriving at Case Avenue at 3:59 p.m.*

*You can walk trainees through filling out the Trip Planning Worksheet as you go.*

### **Transferring Between Buses and Between BART and Bus**

**Facilitator:** As I mentioned before, if you are going a fairly long distance, you may find yourself having to transfer to another Wheels bus or even to another transit system, such as BART. This should not be a problem if you do some trip planning ahead of time. If you know you need to transfer to another Wheels bus, be sure to ask the driver for a transfer slip when you board the bus the first time. You do not need to pay for the transfer, and you have a 2 hour period to use the transfer to board another bus.

If you will need to transfer from BART to a Wheels bus, you can get a transfer slip at the BART station that gives a discount on the Wheels fare. Because this discount fare is the same as the senior fare—\$.85—it may not result in a cost savings for you. However, it may be useful for someone traveling with you

### **PowerPoint Presentation (15 minutes)**

We're now going to see a slide show which will explain a lot of the things you need to know about riding the bus. You will see quite a few slides showing the different aspects of LAVTA buses. We want you to see these pictures so that when we go out and do the field training the buses will at least be familiar to you. We'll practice how to read the bus sign or signaling to the driver that you want to get off the bus when we do our field trip.

*Now turn to your power point presentation.*

(See Power Point Slides at the end of this section)

*After the presentation, continue as follows:*

**Facilitator:** What things in the slide show surprised you? How many of you had a handle on all the information? Even though we ended that slide show with a description of safety

tips, in reality you are very safe on the bus, and the possibility of something bad happening is very small.

### **When Things Don't Go as Planned (Time: 15 minutes)**

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**Facilitator:** We're going to talk about some unplanned situations that can come up and how you would deal with them.

#### **Missing the Bus**

##### **Q1. Buses run on a time schedule. In what situations are you likely to miss a bus?**

A1: If you arrive at the bus stop later than the scheduled arrival/departure time, if the bus is running ahead of schedule, or if you stand where the bus does not stop.

##### **Q2. If you miss the bus, what should you do?**

A2. First, you need to know when the next scheduled bus will arrive or if there is another bus (different route) that can take you to your destination within a reasonable time. Next, you will have to decide on whether to wait for the next bus or whether finding another form of transportation, such as BART or a taxi, is necessary.

#### **Missing the Destination Stop**

##### **Q1. If you realize you've ridden past your bus stop, what should you do?**

A1. Ask for assistance from the bus operator

**Facilitator:** Steps to follow when missing the stop are:

- Decide how far you traveled beyond your intended stop.
- If it's only a few blocks, or less, to the next stop, get off the bus and walk back.
- If the bus has gone several blocks before you've realized that the stop was missed, you should tell the operator what your destination is. You may be given the following options
  - Walk back
  - Ride to the end of the line and ride the return back to your stop
  - Buy a transfer, cross the street and take a bus in the opposite direction
- If you get off the bus and are confused, you should remain calm, locate the nearest intersection and then either use a cell phone if you have one or find a phone to call for assistance. Call 511 to ask for directions to return to your intended stop or destination.

## **Boarding the Wrong Bus**

### **Q1. What should you do if you have boarded the wrong bus?**

A1. If you realize that you boarded the wrong bus early in the route, you should use the same procedure described for missing a bus stop. Tell the operator what your destination is. The operator will give you information on how to get back to the stop. Use your schedule and find when the next scheduled bus will arrive or if there is another bus that can take you to your destination. Next, you will have to decide on whether to wait for the next bus and within a reasonable time or whether finding another form of transportation, such as BART or a taxi, is necessary.

## **Becoming Lost or Off-Track**

**Facilitator:** Becoming lost or off-track occurs when you are unexpectedly confused by an external influence. Generally, people realize they are off-track before they are completely lost. You know you are off track when the landmarks do not match with what you remember. The memories become more clear when you travel your route often. However, if you do become lost, you will need two pieces of information:

- The names of the streets at the nearest intersection where you are now.
- The location of the nearest phone (cell phone, pay phone, local business, etc.)

## Module 3: Classroom Training for Union City Transit

This module will cover:

- Travel skills identification
- Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy
- System Knowledge
- When Things Don't Go As Planned

This module is designed to fit within a 90-minute period of instruction. Suggested timeframes for each component of the classroom training are provided. However, trainers may choose to use different timeframes depending on the needs of trainees.

### **Script: Module 3**

#### **Travel Skills Identification, Motivations and Goal-Setting (Time: 15 minutes)**

**Facilitator:** Before we begin learning about using public transit, let's find out what kind of experience the group has had with public transit in the past. I'd like to have everyone pair up with someone sitting near them. I'm going to ask you each to do a short "interview" of that person. We have a few questions to get you started.

*Sample questions for trainees can be provided on a handout, or written on a flip chart and posted in the training room:*

**Q1:** Why did you decide to come to this training today?

**Q2:** How do you currently get around? Have you taken a ride on a bus before, anytime in the past?

**Q3:** What advice would you give to a friend who is new to using the bus?

**Q4:** Are there particular things about riding a bus that can be confusing for first-time—or even regular—riders?

*After both individuals have finished interviewing the other, you may choose to ask some or all of the questions above of the group as a whole, asking for volunteers to respond, so that the group can benefit from hearing the responses of others.*

**Facilitator:** Now let's do a short brainstorm as a group. What are some examples of the kinds of things do you need to be able to do, or you need to know about, to get around on the bus?

Prompt for facilitator—Sample skills may include:

- *Understanding how to pay the bus fare*
- *Reading and understanding schedules*
- *Figuring out which bus to take*
- *Making transfers between buses*
- *Problem-solving when things don't go as planned (for example, when you miss a bus, get on the wrong bus)*
- *Dealing with other bus riders*
- *Safety tips*

**Facilitator:** We'll be covering most/all of the topics you raised during this training. Now let's talk a little bit about what your goals are for this training.

*The group's responses to the questions below can be charted on flip charts at the front of the room. This validates respondents' contributions, and provides a visual list of goals that can be referred to throughout the training.*

**Q1:** Are there specific places where you would like to be able to travel using the bus?

**Q2:** Are there specific things about riding the bus you'd like to know more about?

### **Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy (Time: 15 minutes)**

**Facilitator:** In a few minutes, we're going to begin to learn about some of the specific things you need to know to get around by bus, but before we get started, I want to spend a few minutes talking about some tips that can help you to travel on transit safely and comfortably.

There are three main parts to any transit trip:

- Getting from your origin/home to the bus stop
- Catching, riding and alighting from the bus, or buses, if you're using more than one
- Getting from the bus stop to your destination

It can be easy focus just on the middle part—the part of the trip that takes place on the bus—but it's important to think about the whole trip when using transit.

Some things to think about when planning your bus trip include the following:

**11. The best route/path to take to the bus stop.** Some things to consider include:

- Does one route have more continuous or better quality sidewalks?
- Does one route avoid intersections that may be difficult to cross safely?

- Is one route a lot steeper than others?
- Is the stop to which you are going in a well-traveled area, with lots of pedestrians, lighting, etc. nearby?

12. **Your stamina.** You probably will have to do some walking both at the beginning and at the end of your bus trip.

- How long of a walk will you have on both ends of your bus trip?
- How steep are the routes you will need to take?
- Will you be carrying shopping bags, packages or other items?
- Are there places to rest along the way if you need to?
- Does your chosen stop have a bench/shelter?

13. **The weather.** It may be a hot or a cold day, or it may be rainy.

- How should you dress to be most comfortable?
- Do you need a hat, sunglasses, an umbrella, different shoes?
- What else would make traveling in more extreme weather more comfortable?

14. **The time of day you will travel.** You *may* be more comfortable traveling when the bus system is less crowded.

- Busy times tend to be the weekday morning and evening rush hour periods, as well as the time after school dismissal in the afternoon. (The best travel times are between 10:00 a.m. and 2:00 p.m.)

15. **The length of the overall trip.**

- How much time will it take you to get from your home to your destination, and back to your home?
- How many transfers will you need to make (if any)?

**Facilitator:** Using transit isn't always easy, and you may identify some potential barriers or challenges when thinking through your trip. The good news is that a lot of seeming barriers to using transit have potential solutions. Let's come up with a few solutions together.

**Q1. Let's say that you're planning a transit trip, and find that the walk from your house to the bus route serving your destination is too far to travel without resting. What might be a solution?**

A1. There may be a closer bus route the rider can use to connect to the route serving the destination

A2. There may be a park, or a café, or a friend's house along the way, where the rider could plan to take a short break to rest.

**Q2. Let's try another scenario. What are some things you can do if you want to make sure that you can get a seat on the bus?**

A1. The rider may want to plan their trip during off-peak hours, if possible. (Preferably between 10:00 a.m. and 2:00 p.m.)

A2. The rider should be encouraged to ask other riders and/or the driver to make a seat available in the priority seating area on the bus.

**Facilitator:** Before we move on, I'd also like to discuss safety. While it is rare for injuries or crime to occur on transit vehicles or in transit stations, there are a few basic things you can do to travel more safely.

The following are some tips for using transit safely:

- If possible, bring just the essentials with you on your transit trip, so that you can keep your hands free for holding on when boarding, alighting, and moving through the bus.
- Stay seated until the bus has come to a complete stop.
- Never cross the street in front of a bus. The bus driver may not know you are there, and may not be able to see you, or a car may be trying to pass the bus to make a turn and the car driver may not see you.
- Take your time when boarding and alighting. If you move more slowly than others, you may feel that you are inconveniencing the driver or other riders, but keep in mind that everyone needs a little extra time sometimes—for example, when loading a bicycle onto the rack on the front of the bus, when boarding with children, when carrying packages or luggage, etc. Take as much time as you need.
- When walking, always cross at a crosswalk or traffic light if possible.
- If walking at night, early in the morning, or late in the afternoon, wear bright clothing or reflective material to be more easily seen by drivers. Don't wear black or dark colors.

Here are a few more tips related to personal safety. When using transit, or walking to and from bus stops:

- Travel with confidence and purpose: stand tall, walk with your head up and be alert. Avoid giving the impression that you don't know where you are.
- Be aware of your surroundings
- Choose walking routes to and from bus stops that are well-lit and populated
- Plan your travel route before beginning your trip. Check out maps, street names, etc.
- Don't provide any personal information to strangers. The person you are talking to may be safe, but others who may overhear might not be.

- If you find yourself feeling uneasy or threatened while riding the bus, change seats and alert the bus driver if necessary.
- Ride towards the front of the bus, close to the driver, if possible.

### **System Knowledge (Time: 45 minutes)**

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**Facilitator:** Today we're going to talk about **trip planning**, discuss how to **read a schedule**, the different kinds of **fares, when buses travel**, and how to **get on and off** the bus.

This is a lot of information, particularly for those of you who have not ridden a bus before. We don't expect you to remember all of this, but we think it will be helpful for you to have some knowledge before we do a field trip or before you go out on your own bus trip.

### **Gathering Information for Trip Planning**

Getting around on Union City Transit is a lot easier if you've done some planning ahead of your trip. There are a few options available to you to help you with your planning. We've listed this information in your workbook.

1. You can call Union City Transit Customer Service at (510) 471-1411 during hours that Union City Transit operates: 4:15 a.m.-10:25 p.m. Monday-Friday; 7:00 a.m.-7:30 p.m. on Saturdays; and 8:00 a.m.-6:30 p.m. on Sundays. You can also call 511 and say "Transit" and then "Union City Transit."
2. If you have access to the web, you can visit Union City Transit's website. The web address is listed in your workbook. You can also get web information by visiting [www.511.org](http://www.511.org).
3. You can use Union City Transit's Route Guide and Timetables brochure, which includes a map of the bus system.

Let's talk about how to use each of these.

### **Calling for Union City Transit Travel Information:**

**Facilitator:** If you call Union City Transit's information line, your call will be answered by a representative who can help you plan your trip.

The representative can provide step-by-step instructions for making your trip, including transfers and total travel time. It is important to have paper and pencil ready to take notes. Someone will be available to help you anytime Union City Transit buses are running. Before you call have the following information ready:

- Starting point address,
- Destination address and
- Arrival or departure time.

## Using the Union City Transit Website

**Facilitator:** The Union City Transit website provides bus schedule and fare information, a bus system map, and other information about bus services. There is a web address for Union City Transit in your workbook. You can also use [www.511.org](http://www.511.org).

## Union City Transit Overview

**Facilitator:** Union City Transit has a Route Guide and Timetables brochure that brings together a lot of the information you need to plan your trip. We've provided each of you with a copy. On one side of the brochure is information for riders and a bus system map. On the other side, you'll find schedules for the five Union City Transit routes. There are different schedules for weekdays, Saturdays, and Sundays.

Before we take a look at a map and plan a trip, I'd like to go over some general information with you about Union City Transit's service.

Firstly, every bus runs according to a timetable, and is scheduled to arrive at each bus stop at a designated time.

**Q1.** How often do you think Union City Transit buses run?

A1. Different buses run on different schedules and frequencies. Routes that run on busier streets, or that connect areas where a lot of people travel, tend to run more frequently. For example, buses on Route 2, which travels between the Union City BART station and Union Landing, run every 20-30 minutes, while buses on Route 3 run every hour. Because some routes have long gaps between buses, it's important to plan ahead so you don't have to wait a long time at a bus stop for a bus to arrive.

**Q2.** How late do you think Union City Transit buses run?

A2. As you can see from the schedules on your brochure, it depends on the route. In general, buses run until around 10:00-10:30 p.m. on weeknights.

**Q3.** What is the difference between weekday and weekend bus schedules?

A3. Some buses that run during the week may not run on the weekends, and those that run generally are less frequent. You can see from the brochure that the schedules for Saturday and Sundays have fewer trips, and that buses stop running much earlier in the evening.

If you look on the other side of the brochure, you'll see a list of holidays under the "Hours of Operation" section. Union City Transit buses do not run on these days. On other holidays, service may be limited. Union City Transit will post notices on buses about limited holiday service.

## Reading a Map

*Ask trainees to pair up with someone else in the class, and refer to the system map.*

**Facilitator:** Please take a look at your Union system map.

**Q1. Can you give me an idea of which areas are served by Union City Transit?**

A1: As you can see by looking at the brightly-colored route lines, Union City Transit routes serve most areas of Union City. You'll also see many beige or light brown routes serving Hayward and Fremont as well as parts of Union City. These are AC Transit bus routes. AC Transit provides bus service in North, Central, and South Alameda County. If you look at the white boxes next to the Union City BART station and Union Landing, you'll see that you can easily transfer to AC Transit buses at these locations.

*Note: You may want to incorporate discussion of AC Transit into the training following the trip planning exercise for Union City Transit. You could provide some basic information about AC Transit services, including the Bus System and Street Map for Fremont, Newark, and Union City, and potentially incorporate a trip planning exercise that involves transferring between Union City Transit and AC Transit services.*

So you really can get all over the county by bus. How often the buses come and go and the limited service hours may be your only restriction in riding throughout the entire county.

**Q2. Do you have any ideas about which areas receive more frequent bus service? Why would that be?**

A2: Areas that have a lot more businesses, homes, or transit connections are more likely to have frequent service, as there are more people there who are likely to use the bus. You can see on the map that many of Union City Transit's bus lines serve the Union City BART station and Union Landing. In other areas, there may be only one bus route, with relatively limited service.

**Facilitator:** Before we talk about planning a trip, I also want to point out that the Route Guide brochure also gives information about bus fares. There are special, reduced fares for riders who are 60 and older.

*Direct trainees to the "Fares and Transfers" and "Monthly Passes" section of the brochure and point out the senior cash fare and monthly pass. You might also want to briefly mention the Regional Transit Connection Discount ID card, which can be used throughout the Bay Area. If trainees are new riders, be sure to let them know that exact change is required when paying a cash fare on a bus.*

**Map and Schedule Reading Exercise**

*Facilitators may want to highlight with a marker the sample route outlined below.*

**Q1: Let's say you've met a friend at the Ruggieri Senior Center on Alvarado-Niles Road, and want to travel to Union Landing to do some shopping.**

*Point out both of these points on the system map.*

**How would you decide which bus to take? Work with your fellow bus rider to try and come up with an answer, or to decide what more information you may need.**

A1: As you can see, a few routes—Routes 1A, 1B, and 3—pass by the Senior Center and travel to Union Landing.

**Q2: How should you decide which one to take?**

A2: Since these routes all go to Union Landing, it would depend on the bus schedule for the routes, and what time you want to leave.

**Q3: Let's say it's a Tuesday afternoon, and you will be ready to leave the Senior Center at around 1:00 p.m. Which bus should you take?**

A3: To make this decision, you will need to turn over the handout and look at the bus schedules. At first this looks quite confusing, because there is a lot of information. But remember, the chances are you will only ever have to look at a few of the bus lines on this map, so you can concentrate on those. I have highlighted the information for Routes 1A, 1B, and 3 on your schedule. You'll see that there is no column that shows exactly what time the bus will pass by the Senior Center. However, since the buses all start at the BART station, you can assume that they will pass by the Senior Center a few minutes after the times in the "BART" column.

**Q4: Does any route have a bus scheduled to leave the BART station around 1:00 p.m.?**

A4: Yes, two routes have a bus scheduled around this time: a bus on Route 3 leaves BART at 12:55 p.m., and a bus on Route 1A leaves BART at 1:05 p.m. (Buses on Route 1B leave at 12:35 p.m. and 1:35 p.m., so that route doesn't work well for this trip.)

**Q5: Since both Route 1A and Route 3 have buses passing the Senior Center around the time you want to depart, how would you choose which route to take, if you wanted to travel to Union Landing as quickly as possible?**

A5: You can look at what times the buses arrive at Union Landing. By looking at the map, you can see that the Route 3 takes a less direct route to Union Landing. If you check the schedule, you can see that the Route 3 trip leaving BART at 12:55 p.m. doesn't arrive at Union Landing until 1:34 p.m.—about 40 minutes later. However the trip on Route 1A leaving BART at 1:05 arrives at Union Landing at 1:19 p.m.—just 15 minutes later. For the shortest trip to Union Landing, you'd want to take Route 1A.

### **Schedule Reading Exercise (With Trip Planning Worksheet)**

**Facilitator:** Now we're going to plan the bus trip back from Union Landing. This time we're going to use a Trip Planning Worksheet that you can use to keep track of information

when planning a trip. If you take a look at the Worksheet, you'll see that there are places to fill in your starting point and destination, the time and day you want to travel, the route you will use, and times the bus is scheduled to pick you up and to arrive at your destination, and how much the trip will cost.

We're going to assume that you want to leave Union Landing around 4:00 p.m. to return to the Senior Center.

*Using schedules for bus numbers 1A and 1B, go through a similar exercise to the previous one for the return trip. It will be important to note that trainees will want to refer to the second column of trip times listed for Union Landing on the schedules for Routes 1A and 1B—those that apply to trips traveling back in the direction of the Union City BART Station.*

*You can walk trainees through filling out the Trip Planning Worksheet as you go. Again, the schedule does not provide an exact arrival time for the Senior Center. You can let trainees know that if they need to know more accurately when the bus is scheduled to arrive, and their origin or destination isn't near a time point, they can call Union City Transit for information.*

### **Transferring Between Buses and Between BART and Bus**

**Facilitator:** As I mentioned before, if you are going a fairly long distance, you may find yourself having to transfer to another Union City Transit bus or even to another transit system, such as BART or AC Transit. This should not be a problem if you do some trip planning ahead of time. If you know you need to transfer to another Union City Transit bus, be sure to ask the driver for a transfer slip when you board the bus the first time. You do not need to pay for the transfer slip.

If you will need to transfer from BART to a Union City Transit bus, you can get a transfer slip at the BART station that will give you a discount on your Union City Transit fare. Because this discount fare is the same as the senior fare—\$.50—it may not result in a cost savings for you. However, it may be useful for someone traveling with you.

### **PowerPoint Presentation (15 minutes)**

We're now going to see a slide show which will explain a lot of the things you need to know about riding the bus. You will see quite a few slides showing the different aspects of Union City Transit buses. We want you to see these pictures so that when we go out and do the field training the buses will at least be familiar to you. We'll practice how to read the bus sign or signaling to the driver that you want to get off the bus when we do our field trip.

*Now turn to your power point presentation.*

(See Power Point Slides at the end of this section)

*After the presentation, continue as follows:*

**Facilitator:** What things in the slide show surprised you? How many of you had a handle on all the information? Even though we ended that slide show with a description of safety tips, in reality you are very safe on the bus, and the possibility of something bad happening is very small.

### **When Things Don't Go as Planned (Time: 15 minutes)**

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**Facilitator:** We're going to talk about some unplanned situations that can come up and how you would deal with them.

#### **Missing the Bus**

##### **Q1. Buses run on a time schedule. In what situations are you likely to miss a bus?**

A1: If you arrive at the bus stop later than the scheduled arrival/departure time, if the bus is running ahead of schedule, or if you stand where the bus does not stop.

##### **Q2. If you miss the bus, what should you do?**

A2: First, you need to know when the next scheduled bus will arrive or if there is another bus (different route) that can take you to your destination within a reasonable time. Next, you will have to decide on whether to wait for the next bus or whether finding another form of transportation, such as BART or a taxi, is necessary.

#### **Missing the Destination Stop**

##### **Q1. If you realize you've ridden past your bus stop, what should you do?**

A1. Ask for assistance from the bus operator

**Facilitator:** Steps to follow when missing the stop are:

- Decide how far you traveled beyond your intended stop.
- If it's only a few blocks, or less, to the next stop, get off the bus and walk back.
- If the bus has gone several blocks before you've realized that the stop was missed, you should tell the operator what your destination is. You may be given the following options
  - Walk back
  - Ride to the end of the line and ride the return back to your stop
  - Buy a transfer, cross the street and take a bus in the opposite direction
- If you get off the bus and are confused, you should remain calm, locate the nearest intersection and then either use a cell phone if you have one or find a phone to call

for assistance. Call 511 to ask for directions to return to your intended stop or destination.

### **Boarding the Wrong Bus**

#### **Q1. What should you do if you have boarded the wrong bus?**

A1. If you realize that you boarded the wrong bus early in the route, you should use the same procedure described for missing a bus stop. Tell the operator what your destination is. The operator will give you information on how to get back to the stop. Use your schedule and find when the next scheduled bus will arrive or if there is another bus that can take you to your destination. Next, you will have to decide on whether to wait for the next bus and within a reasonable time or whether finding another form of transportation, such as BART or a taxi, is necessary.

### **Becoming Lost or Off-Track**

**Facilitator:** Becoming lost or off-track occurs when you are unexpectedly confused by an external influence. Generally, people realize they are off-track before they are completely lost. You know you are off track when the landmarks do not match with what you remember. The memories become more clear when you travel your route often. However, if you do become lost, you will need two pieces of information:

- The names of the streets at the nearest intersection where you are now (Broadway and 20th street, Telegraph and 56th street, etc).
- The location of the nearest phone (cell phone, pay phone, local business, etc.)

## Module 4: Classroom Training for BART

*FACILITATOR: THIS SCRIPT HAS BEEN DESIGNED TO BE USED IN ANY PART OF ALAMEDA COUNTY. YOU MAY WISH TO CUSTOMIZE IT ACCORDING TO THE LOCATION OF YOUR SESSION.* This module will cover:

- Travel skills identification
- Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy
- System Knowledge
- When Things Don't Go As Planned

This module is designed to fit within a 90-minute period of instruction. Suggested timeframes for each component of the classroom training are provided. However, trainers may choose to use different timeframes depending on the needs of trainees.

### **Script: Module 1**

#### **Travel Skills Identification, Motivations and Goal-Setting (Time: 15 minutes)**

**Facilitator:** Before we begin learning about using public transit, let's find out what kind of experience the group has had with public transit in the past. I'd like to have everyone pair up with someone sitting near them. I'm going to ask you each to do a short "interview" of that person. We have a few questions to get you started.

*Sample questions for trainees can be provided on a handout, or written on a flip chart and posted in the training room:*

**Q1:** Why did you decide to come to this training today?

**Q2:** Have you taken a ride on a train or a bus before, anytime in the past? How do you currently get around?

**Q3:** What advice would you give to a friend who is new to using transit?

**Q4:** Are there particular things about riding a train or a bus that can be confusing for first-time—or even regular—riders?

*After both individuals have finished interviewing each other, you may choose to ask some or all of the questions above of the group as a whole, asking for volunteers to respond, so that the group can benefit from hearing the responses of others.*

**Facilitator:** Now let's do a short brainstorm as a group. What are some examples of the kinds of things you need to be able to do, or you need to know about, to get around on transit?

*Prompt for facilitator—Sample skills may include:*

- *Understanding how to pay the fare*
- *Reading and understanding schedules*
- *Figuring out which trains and buses to take*
- *Making transfers between trains, or between trains and buses*
- *Problem-solving when things don't go as planned (for example, when you miss a train, get on the wrong train)*
- *Dealing with other riders*

**Facilitator:** We'll be covering most/all of the topics you raised during this training. Now let's talk a little bit about what your goals are for this training.

*The group's responses to the questions below can be charted on flip charts at the front of the room. This validates respondents' contributions, and provides a visual list of goals that can be referred to throughout the training.*

**Q1:** Are there specific places where you would like to be able to travel using the train?

**Q2:** Are there specific things about riding the train you'd like to know more about?

### **Tips for Trips: Barrier Analysis, Safety, and Self-Advocacy (Time: 15 minutes)**

**Facilitator:** In a few minutes, we're going to begin to learn about some of the specific things you need to know to get around by transit, but before we get started, I want to spend a few minutes talking about some tips that can help you to travel on transit safely and comfortably.

There are three main parts to any transit trip:

- Getting from your origin/home to the train station or bus stop
- Catching, riding and alighting from the train or the bus, or trains and buses, if you're using more than one
- Getting from the stop to your destination

It can be easy to focus just on the middle part—the part of the trip that takes place on the train or bus—but it's important to think about the whole trip when using transit.

Some things to think about when planning your transit trip include the following:

1. The best route/path to take to the train station or bus stop. Some things to consider include:
  - If I'm going to a train station, and it's not within walking distance, is there a bus I can take?
  - When walking, does one route have more continuous or better quality sidewalks?
  - Does one route avoid intersections that may be difficult to cross safely?
  - Is one route a lot steeper than others?
2. **Your stamina.** You probably will have to do some walking both at the beginning and at the end of your trip.
  - How long of a walk will you have on both ends of your trip?
  - How steep are the routes you will need to take?
  - Will you be carrying shopping bags, packages or other items?
  - Are there places to rest along the way if you need to?
3. **The weather.** It may be a hot or a cold day, or it may be rainy.
  - How should you dress to be most comfortable?
  - Do you need a hat, sunglasses, an umbrella, different shoes?
  - What else would make traveling in more extreme weather more comfortable?
4. **The time of day you will travel.** You *may* be more comfortable traveling when the transit system is less crowded.
  - Busy times tend to be the weekday morning and evening rush hour periods, as well as the time after school dismissal in the afternoon.
5. The length of the overall trip.
  - How much time will it take you to get from your home to your destination, and back to your home?
  - How many transfers will you need to make (if any)?

**Facilitator:** Using transit isn't always easy, and you may identify some potential barriers or challenges when thinking through your trip. The good news is that a lot of barriers to using transit have potential solutions. Let's come up with a few solutions together.

**Q1. Let's say that you're planning a transit trip, and find that the walk from your house to the train station serving your destination is too far to travel without resting. What might be a solution?**

A1. There may be a bus route the rider can use to connect to the train serving the destination.

A2. There may be a park, or a café, or a friend's house along the way, where the rider could plan to take a short break to rest.

**Q2. Let's try another scenario. What are some things you can do if you want to make sure that you can get a seat on the train or the bus?**

A1. The rider may want to plan their trip during off-peak hours, if possible.

A2. The rider should be encouraged to ask other riders and/or the driver to make a seat available in the priority seating area on the train or bus.

**Facilitator:** Before we move on, I'd also like to discuss safety. While it is rare for injuries or crime to occur on transit vehicles or in stations, there are a few basic things you can do to travel more safely.

The following are some tips for using transit safely:

- If possible, bring just the essentials with you on your transit trip, so that you can keep your hands free for holding on when boarding, alighting, and moving through the bus or train.
- Stay seated until the train or the bus has come to a complete stop.
- Never cross the street in front of a bus. The driver may not know you are there, and may not be able to see you.
- Take your time when boarding and alighting. If you move more slowly than others, you may feel that you are inconveniencing the driver or other riders, but keep in mind that everyone needs a little extra time sometimes—for example, when loading a bicycle onto the rack on the front of a bus, when boarding with children, when carrying packages or luggage, etc. Take as much time as you need.
- When walking, cross at a crosswalk or traffic light whenever possible.
- If walking at night, early in the morning, or late in the afternoon, wear bright clothing or reflective material to be more easily seen by drivers.

Here are a few more tips related to personal safety. When using transit, or walking to and from train stations or bus stops:

- Travel with confidence and purpose: stand tall, walk with your head up and be alert. Avoid giving the impression that you don't know where you are.
- Be aware of your surroundings
- Choose walking routes to and from bus stops that are well-lit and populated
- Don't provide any personal information to strangers. The person you are talking to may be safe, but others who may overhear might not be.

- If you find yourself feeling uneasy or threatened while riding the train or the bus, change seats and alert the driver if necessary. *On a BART train, the driver can be contacted using the intercom located at both ends of each car.*

## **System Knowledge (Time: 45 minutes)**

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**Facilitator:** Today we're going to talk about **trip planning**, discuss how to **read a schedule**, the different kinds of **fares**, **when trains travel**, and how to **get on and off** the train.

This is a lot of information, particularly for those of you who have not ridden a train or a bus before. We don't expect you to remember all of this, but we think it will be helpful for you to have some knowledge before we do a field trip or before you go out on your own transit trip.

### **Gathering Information for Trip Planning**

Getting around on BART is a lot easier if you've done some planning ahead of your trip. There are a few options available to you to help you with your planning. We've listed this information in your workbook.

1. You can call BART at (510) 465-BART if you live in Oakland, Berkeley or San Leandro, 236-BART if you live in El Cerrito, or 441-BART if you live in Southern Alameda County; or, you could just call 511. If you call BART, someone will be available between 8:30 a.m. and 5 p.m. Monday through Friday to help you plan your trip, or you can get recorded information between 6 a.m. and 11p.m. every day.
2. If you have access to the web, you can visit BART's website at [www.BART.gov](http://www.BART.gov) or via [www.511.org](http://www.511.org).
3. You can use BART's map and schedules.

Let's talk about how to use each of these.

### **Calling for BART Travel Information:**

**Facilitator:** If you call BART's Transit Information Center, a recorded message will begin. You can go right to a customer service representative by pressing 0, or you can get recorded information about schedules and fares by pressing 3.

BART operators will provide step-by-step instructions, including transfers, walking directions and total travel time. It is important to have paper and pencil ready to take notes. Customer service representatives are available weekdays between 8:30 a.m. and 5 p.m. After hours, recorded information can be accessed. Before you call have the following information ready:

- Starting point address,
- Destination address and,

- Arrival or departure time.

### Using BART's Website

**Facilitator:** The BART QuickPlanner provides a step-by-step itinerary that shows walking directions, train lines you can catch, transfer points (if you need to transfer) and total travel time. The web address is [www.BART.gov](http://www.BART.gov). You can also access this information through the [www.511.org](http://www.511.org) website.

### BART Overview

**Facilitator:** Before we take a look at a map and plan a trip, I'd like to go over some general information with you about BART service.

First, every BART train runs on a fixed route system and is scheduled to arrive at each station at a designated time.

**Q1.** How often do you think BART trains run?

A1. Different lines run on different schedules and frequencies. Generally, your wait should be no longer than 15 minutes, and could be much shorter. For example, at the XX station in this neighborhood (state name), trains to XX run every XX minutes during the middle of the day and trains to YY run every YY minutes during the rest of the day.

**Q2.** What is the difference between day-time and night-time lines?

A2. Some lines do not run in the evening or on Sundays. These are the lines from Richmond to San Francisco and Daly City, and from Fremont to San Francisco and Daly City. When these lines are not running, you can still get to and from San Francisco and Daly City, but you will have to take two trains. If you are coming from south of San Leandro, you can catch a Richmond train to Bay Fair Station, where you can transfer to a San Francisco/Daly City train. If you are coming from Berkeley or Albany, you can take a Fremont train to MacArthur Station, where you can transfer to a San Francisco/Daly City train.

**Q3.** What if I want to ride late at night?

A2. Trains stop running around midnight. How many of you need to travel after midnight?

*If no one rides at night you might suggest:*

If you are interested in the future about late-night service, you can call 511 for information on All Nighter buses. For now, let's focus on your day routes.

*If someone does ride late at night:*

Since you are night riders let's talk about a new bus service called the All Nighter. The service runs about every hour. This means you'll never be stranded at night in case of emergencies. For more information on the All Nighter, you can dial 511 on your phone and say "All Nighter."

### **Reading a Map**

*Ask trainees to pair up with someone else in the class, and to take out a copy of the Fares and Schedules booklet provided to them.*

**Facilitator:** Please take a look at your BART Fares and Schedules booklet. You have a lot of information here on scheduling. We'll get to it in a minute. But let's open the booklet to the map.

### **Q1. Can you give me an idea of which areas are served by BART?**

A1: The service area is quite extensive. As you can see, almost every part of Alameda County has stations, although distances to some stations may make it difficult for you to easily walk to them. If you need to take a bus, bus service is provided by AC Transit in most of Alameda County, by Union City Transit in that city, and LAVTA provides service in eastern Alameda County. If you'd like to learn more about any of these, we offer separate training sessions. Just come and talk to me after this session.

**Facilitator:** *Direct trainees to "BART Tickets" on page 2. You might also want to briefly mention the Regional Transit Connection Discount ID card, which can be used throughout the Bay Area.*

Before we talk about planning a trip, let's talk about BART fares. Unlike bus fares, BART fares vary depending on where your trip begins and ends. If you turn to page 3, you can see a fare chart. If you are a senior, disabled or a Medicare Card holder, however, you are eligible for a discount.

There are special "green" discount tickets for riders who are 65 and older. There are also "red" discount tickets for riders with disabilities or Medicare Card holders. The discount is nearly 2/3 less than the regular price. You can buy the tickets at many locations, including stores and social service agencies – call BART to find out the ticket sales location closest to you. When you ride, you will need to carry either proof of age, of disability (such as a State of California DMV Placard ID Card), or your Medicare Card.

When you get to the station, you will need to slide your BART ticket into the slot on the front of the faregate, then take it with you when it slides out of the slot on top of the faregate. You will need your ticket to exit BART – don't forget to keep your ticket! When your ticket is out of money, the BART faregate will keep it as you exit the station. Otherwise, you should always take your ticket with you.

## Map Reading Exercise

*Facilitators will need to provide Oakland/Berkeley street maps. You may want to highlight with a marker the sample route outlined below.*

**Facilitator:** Now let's get out the street map that was given to you, and let's plan a trip.

**Q1: Let's say you live on the corner of East 16<sup>th</sup> Street and 29<sup>th</sup> Avenue in Fruitvale (point this location out on the map). And you want to go to Kaiser Hospital at MacArthur and Broadway in North Oakland. How would you get there? Work with your fellow BART rider to try and come up with an answer, or to decide what more information you may need.**

A1: As you can see, you are a fairly long walk (about one half-mile) from the Fruitvale BART station, which is just off of International Boulevard at 34<sup>th</sup> Avenue. If this is too far for you to walk, you might walk instead to International Boulevard, cross the street, and look for the nearest AC Transit bus stop. You can catch an eastbound Route #1 bus to the station. This bus runs every 15 minutes during weekdays, but less frequently at night and on the weekend. AC Transit adult fares are \$1.75, and for seniors and the disabled, fares are 85 cents. If you'd like to learn more about how to use AC Transit, Union City Transit, or LAVTA, come and talk to me after the session.

**Q2: Once I get to the station, which train should I take?**

A2: As you can see from the street map, the closest BART station to Kaiser Hospital is MacArthur Station. The BART line serving both Fruitvale Station and MacArthur station is the Richmond-Fremont line. You will be taking it toward Richmond, so follow the signs inside the station that read "Richmond." Once you are on the platform, watch the electronic signs. They will tell you how many minutes until the next Richmond train arrives, and as a train is arriving, they will tell you if it is a Richmond or a San Francisco-Daly City train.

**Q3: Let's say it's a Tuesday afternoon, and you need to be at the hospital by 3:30 p.m. Which train should you take?**

A3: To make this decision, you will need to turn to page 12 in your Fares and Schedules booklet, Fremont to Richmond, weekday schedule. At first this looks quite confusing, because there is a lot of information. But remember, BART trains generally run every 15 minutes, so if you miss your train, the next one should be along before long. If you look in the column under "MACAR," you will see that a train arrives at MacArthur at 2:58. This should leave you plenty of time to get from the station to the hospital. Moving your finger left in that row to the column under "FRTVL," you can see that the train arriving at MacArthur at 2:58 leaves Fruitvale at 2:45. Once you are on the train, your driver will announce each stop. You might wish to sit close to the door so that you have more time to get off once you are at your destination.

**Q4: Okay, now you need to find your way from MacArthur Station to Kaiser Hospital. But this time I want you to figure out how on your own, rather than with your traveling buddy. How should you get there?**

A4: Again, the distance from the station to your destination is more than one half-mile. Since this is probably too far for you to walk, you can catch either a Kaiser shuttle (which will be directly in front of you as you exit the faregates), running about every 15 minutes all day, or an eastbound AC Transit bus #57 on 40<sup>th</sup> Street outside of the station. Upon exiting the train and walking toward the exit, look for the maps or signs pointing you toward the bus stops, or ask the station agent. You might also look for a transfer machine before you reach the faregate, which will give you a slip that is good for a discount on an AC Transit bus. (The discount is \$.20 off the senior and disabled fare of \$.85.) To get information on AC Transit buses, or about any Bay Area buses or trains, you can always dial “511” on your phone. If it’s during daytime hours, you can ask the operator to tell you what time the bus is scheduled to arrive at your location.

### **PowerPoint Presentation (15 minutes)**

We’re now going to see a slide show which will explain a lot of the things you need to know about riding BART.

*Now turn to your power point presentation.*

(See Power Point Slides at the end of this section)

*After the presentation, continue as follows:*

**Facilitator:** What things in the slide show surprised you? How many of you had a handle on all the information? Even though we ended that slide show with a description of safety tips, in reality you are much safer on the train than you may be walking around in some neighborhoods, and the possibility of something bad happening is very small.

### **When Things Don’t Go as Planned (Time: 15 minutes)**

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**Facilitator:** We’re going to talk about some unplanned situations that can come up and how you would deal with them.

#### **Missing the Train**

**Q1. Trains and buses run on a time schedule. In what situations are you likely to miss a train or a bus?**

A1: If you arrive at the train station or bus stop later than the scheduled arrival/departure time, if the bus is running ahead of schedule, or if you stand on the wrong platform, or where the bus does not stop.

**Q2. If you miss your train or bus, what should you do?**

A2. First, you need to know when the next scheduled train or bus will arrive or if there is another train or bus that can take you to your destination. If you are going to San Francisco, there may be two different BART lines that you can take, and the next train is likely to come along, on the same platform, in just a few minutes. If waiting for the next train or bus might make you late, you may have to decide whether finding another form of transportation, such as a taxi, would be better.

### **Missing the Destination Stop**

#### **Q1. If you realize you've ridden past your stop, what should you do?**

A1. Get off of the train at the next stop. To catch a train headed in the direction you just came from, you may be able to simply walk across the platform to the other side. At some stations, there may be tracks between the platforms. In that case, follow the signs to the other platform.

### **Boarding the Wrong Train**

#### **Q1. What should you do if you have boarded the wrong train?**

A1. If you realize that you boarded the wrong train, you should use the same procedure described for missing your stop. Many BART lines share stations, so you may be able to simply get off and wait for your train to come along. If you are not sure, look for a map. There are also schedules for all trains on BART platforms, so you can decide whether to take BART and potentially be late or whether finding another form of transportation, such as a taxi, is necessary.

### **Becoming Lost or Off-Track**

**Facilitator:** Becoming lost or off-track occurs when you are unexpectedly confused by an external influence. Generally, people realize they are off-track before they are completely lost. You know you are off track when the landmarks do not match with what you remember. The memories become more clear when you travel your route often. However, if you do become lost, you will need two pieces of information:

- The location of the nearest phone (cell phone, pay phone, local business, etc.)
- The names of the streets at the nearest intersection where you are now (Broadway and 20th street, Telegraph and 56th street, etc).



## Chapter 5. Field Training Guidelines

### Goals and Objectives

The goals of field training are:

- To provide trainees with the opportunity to experience a transit trip
- To allow trainees to observe and practice key elements of riding transit
- To reinforce information provided in the classroom training, and introduce new components of system knowledge in a field setting.

### Background for Trainers

Travel training provides information, activities and practice. Each step of the program has objectives that move the trainee closer to attaining the ultimate goal of independent transit use. The steps are:

- Experiencing—information-sharing and field practice.
- Sharing—discussing what has happened and problem solving ways to improve upon experience.
- Interpreting or Association—linking one event, condition, or idea with another. Pointing out landmarks during the transit trip is one way of making associations for the trainee to use later.
- Generalizing and Applying—the ability to make associations, problem-solve, and transfer training concepts to other transit trips.

Field training provides the opportunity to engage a variety of learning styles. There are three distinct learning styles. They are: Visually – through seeing, Auditory – through hearing, Practically – through doing. All forms of learning styles can be engaged during field training by the trainer. Trainers may model actions (such as signaling for the bus to stop), ask trainees to practice actions, give verbal instructions and explanations, and point out features of vehicles, key landmarks, or provide other visual cues.

### Tips for Field Training

When planning a field training, the following tips can help ensure that the transit trip is a fun, comfortable, and successful component of the travel training:

- Plan a fun trip—use transit to travel to a destination of particular interest to trainees.
- Limit transit travel time to a maximum of one hour in each direction.
- Plan for bathroom breaks during the course of the field training.

- Limit the number of trainees in a field training session to a manageable number to ensure that all trainees can be engaged and that transit vehicles do not become overcrowded. Groups of up to eight trainees are suggested.
- Try to schedule field training outside of peak travel times, unless training is to occur on routes that are not prone to overcrowding.
- If another trainer is not available to participate in the field training, try to arrange for a staff member at your agency to be on-call if there is a problem during the field training and additional assistance is required.
- Plan ahead for how fare payment (if necessary) will be accomplished for trainees.

## Key Messages and Opportunities for Effective Field Training

The following are key actions to be taken during field training that can convey new information and reinforce classroom training:

- Reinforce understanding of schedules and route maps, and opportunities to transfer. This can be accomplished by asking trainees to cross-reference the vehicle location with printed schedules and/or maps at key timepoints.
- Introduce techniques for orienting during a transit trip, by pointing out key landmarks along the route, or asking trainees to reference locations along the route with printed schedules or maps.
- Use the field training as an opportunity to revisit barrier analysis, safety, and self-advocacy concepts covered in the classroom training (see Chapter 4). The field training can also be used to cover actions to take “When Things Don’t Go as Planned” (also included in the classroom training presented in Chapter 4).
- Narrate the actions of other passengers, as appropriate, and when instructive.
- Demonstrate—and allow trainees to participate in—key actions such as identifying the correct transit vehicle, fare payment, asking for a transfer, and signaling for the bus to stop.
- As discussed above, use field training as an opportunity to reinforce trainees’ self-advocacy skills. Opportunities to support self-advocacy include discussion of priority seating areas on transit vehicles and introducing transit agency tools for self-advocacy (e.g. AC Transit’s “flash cards” for signaling for the bus to kneel, for the driver to wait to accelerate until the rider is seated, etc.).

## Checklist of Topics to Cover During Field Training—Bus Systems

The following is a checklist of the basic elements of transit travel to be covered during field training on bus systems (*Note: Please see Appendix 6 for a sample of detailed “Teaching Points” for use during field training*):

- Identifying bus stops and understanding bus stop signage and information

- Understanding how to identify bus stops for buses traveling in the desired direction
- Identifying transit vehicles (e.g. reading headsigns and knowing which vehicle to board at busy or multi-route bus stops)
- Signaling for the bus to stop to pick-up passengers
- Fare payment, with cash and pass, and asking/paying for a transfer
- Location and intended use of priority seating areas
- Signaling for the bus to stop to drop-off passengers—including strategies for knowing when to signal (e.g. recognizing streets or landmarks in advance of desired stop, knowing generally how far in advance of destination to signal)
- Safe boarding and alighting (including not crossing the street in front of a transit vehicle)
- Key transfer opportunities along the route

### **Checklist of Topics to Cover During Field Training—BART**

The following is a checklist of the basic elements of transit travel to be covered during field training on BART (*Note: Please see Appendix 6 for a sample of detailed “Teaching Points” for use during field training*):

- BART station familiarization—locating restrooms (if available), information kiosks and maps, station agent’s booth, fare gates, elevators, phones
- Fare payment—methods for purchasing tickets, entering fare gates, and retaining tickets for exit at the end of the trip
- Identifying the appropriate platform for the trip
- Platform orientation—train direction and length, understanding platform signage
- Platform safety—staying back from detectable edge
- Location and intended use of priority seating areas on trains
- Knowing when to alight—stop announcements, signage at stations
- Safe boarding and alighting—gap between platform and train interior, waiting for other passengers to exit before entering the train, “dwell time” of trains at station stops
- Choosing which exit to take from BART stations (more important at large stations with multiple exits over several blocks)
- Locating bus stops outside of BART stations
- Key transfer opportunities



## Chapter 6. Strategies for Providing Follow-up Support to Trainees

Providing some form of follow-up support is a key means of ensuring that your training is as effective as possible in promoting successful and ongoing transit use by trainees. This is especially important for novice riders, who may need extra support or encouragement to use transit beyond the training session itself, or may find that they have questions or concerns once they have had the chance to try transit independently. Follow-up also demonstrates that trainers are invested in trainees' long-term success with using transit.

Follow-up can take a wide range of forms depending on staff time, organizational capacity, and budget. Some strategies to consider include the following:

- Provide the phone number of a resource person who is available for follow-up support for trainees, or organize “office hours” at a senior center, housing facility, or other relevant location.
- Plan for a formal or informal contact with trainees a few weeks or a month after training has been completed to check in, answer questions that may have arisen, and offer encouragement. (This contact can also be used to identify individuals who may be candidates for additional training.)
- Organize a peer-to-peer support program, perhaps matching trainees with a more experienced transit rider.
- Provide outings on transit for training graduates.
- As part of each training, plan to leave information at the host facility (or another key gathering place in the community) that supports ongoing transit use. For example, post a blown up map of the local transit route and key destinations, with timepoint information, at a senior center.



## **APPENDIX 1**

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### OUTLINE OF CLASSROOM TRAINING SAMPLE WORKSHOP OUTLINE



## Outline of Classroom Training

- 1. Trainer Introductions and Welcome**
- 2. Review agenda and goals for the classroom session**
  - a. Order of events
  - b. Breaks
- 3. Housekeeping—location of restrooms, refreshments, etc.**
- 4. Travel Skills Identification**
  - a. Short “interview” in trainee pairs (questions given in script) and group debrief
  - b. Group brainstorm—travel skills needed when riding public transit
- 5. Participant Goal-setting**
  - a. Brainstorming session documented on flip charts
- 6. Tips for Trips: Barrier Analysis, Safety and Self-Advocacy**
  - a. Overview of potential barriers and suggestions for overcoming them
  - b. Group problem-solving for scenarios involving potential barriers (facilitator-led)
  - c. Safety tips
- 7. System Knowledge (Trip Planning)**
  - a. Gathering Information for Trip Planning
  - b. Transit Agency Overview—Q&A related to bus service frequency, hours of operation, weekday versus weekend service
  - c. Reading a Map—Q&A related to transit system service area, distribution of services
  - d. Overview of Fares and Passes

- e. Map Reading Exercise—Choosing the best route to use (partner and group exercise)
- f. Schedule Reading Exercise with Trip Planning Worksheet (group exercise)
- g. Transferring Between Buses and BART

**8. PowerPoint presentation**

- a. Bus Stops and Stop/Vehicle Signage
- b. Getting on the Bus
- c. Fares
- d. Signaling For a Stop
- e. Safety

**9. When Things Don't Go as Planned**

- a. Missing the Bus
- b. Missing the Destination Stop
- c. Boarding the Wrong Bus
- d. Becoming Lost or Off-Track

## Sample Travel Training Workshop Outline Detailed (staff) version

1. Welcome and Opening
  - a. Introductions and overview of today... *how did you get here today?*
  - b. Workshop Leader – opening comments → 3 messages. Your comfort level
  - c. Logistics
    - i. Bathrooms, breaks, lunch
    - ii. note: “you may get a call to help us improve workshop”
2. Trips / Goals – Why you came, places to go... goal-setting. **A small step.**
3. Look and Feel of Riding – including being prepared for what can go wrong  
(2:10-3)
  - a. “What Transit Can Do For You” video
  - b. Power-Point: AC Transit and discuss
  - c. What can go wrong, and what to do
  - d. Strategies when language is a barrier

– break –

4. Map Reading and Trip Planning – WORK IN TABLE GROUPS
  - a. What’s in packets
  - b. Orientation to big map and pocket timetables
    - i. Big map, bus lines, route overview panel
    - ii. Timetable
    - iii. Find this location... and home
    - iv. Find a way to get to shops in Union City
      1. Finding the right timepoint on timetable... estimating
      2. First and last bus
  - c. All: discuss, problem-solve, clarify

– BREAK –

5. Field Outing
  - a. Sign waivers, hand out tickets, look at timetables
  - b. GO & RETURN WHILE LEARNING
6. Evaluation and Closing
  - a. My comfort level now? *Something I learned today which I can tell a new rider.* Someone who might be my buddy?
  - b. How was today?



## **APPENDIX 2**

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### SAMPLE HANDOUTS AND FORMS



**Sample Form**  
[place your logo here]

**Travel Training Registration: Your Ticket to Getting Around**

**Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

Please help us customize this program to meet your needs:

Check all the boxes that apply to you.

1. In the past, I have ridden:

- Buses outside of Alameda County
- AC Transit Buses
- LAVTA Buses
- Union City Buses
- Paratransit vans
- BART
- Never ridden public transit

2 I currently ride

- AC Transit Buses
- LAVTA Buses
- Union City Buses
- Paratransit vans
- BART

3. I currently drive a car

- Yes
- No

4. If you do drive, how often do you drive and where do you drive to?

5. What one thing keeps you from riding public transit more often?

## Sample Form

[place your logo here]

### Riders Survey: Where Have You Been and Where You Are Going

Name:

Address:

Phone:

Please help us customize this program to meet your needs:

Check all the boxes that apply to you.

1. How do you usually get around?

- Ride in a car with friends or relatives
- Drive your own vehicle
- Paratransit
- Taxi
- Bus
- BART
- Walk or use assisted mobility devise  
What kind? \_\_\_\_\_

2. In the past, I have ridden:

- Buses outside of Alameda County
- AC Transit Buses
- LAVTA Buses
- Union City Buses
- Paratransit vans
- BART

Never ridden public transit

3. Check which mode of transportation you use to get to each location.

	Car	Bus	BART	Paratransit
a. Medical Appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Social/ Recreation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Grocery shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Other shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Errands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Beauty/barbershop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Work (paid and volunteer)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. House of Worship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. If you either have never used the bus or BART or have stopped using either one, what are the reasons?

	Bus	BART
a. didn't know how	<input type="checkbox"/>	<input type="checkbox"/>
b. worried about getting hurt	<input type="checkbox"/>	<input type="checkbox"/>
c. worried about getting lost	<input type="checkbox"/>	<input type="checkbox"/>
d. worried about personal safety	<input type="checkbox"/>	<input type="checkbox"/>
e. speed of the system	<input type="checkbox"/>	<input type="checkbox"/>
f. stairs or high steps	<input type="checkbox"/>	<input type="checkbox"/>
g. few places to use the restroom	<input type="checkbox"/>	<input type="checkbox"/>
h. schedules are inconvenient	<input type="checkbox"/>	<input type="checkbox"/>
i. stations are confusing	<input type="checkbox"/>	<input type="checkbox"/>
j. cost	<input type="checkbox"/>	<input type="checkbox"/>
k. waiting in bad weather	<input type="checkbox"/>	<input type="checkbox"/>
l. can't carry all my groceries	<input type="checkbox"/>	<input type="checkbox"/>

- m. unfriendly
- n. difficult to buy tickets
- o. I drive my own car
- p. I got rides with family or friends
- q. I used paratransit

5. If you have medical issues that affect your ability to use public transportation, share what these are

- low vision
- hearing problems
- use a cane or braces
- knee or leg problems
- heart conditions (for example: angina, high blood pressure)
- breathing problems
- frequent need to use the restroom
- stroke

6. Are there specific things about riding the bus you'd like to know more about?

- Learn how to get to certain places
- Find out about special discounts
- Learn to use the fare boxes
- Understand how to read a route map
- Find out how to be more safe when riding
- Other \_\_\_\_\_

## Sample Form—Participant Evaluation

**Thank you for attending our travel training session. To help us improve our training, please complete the following questions.**

1. When you began the session, how confident did you feel about riding the bus? Did you feel? Circle 1 if you were very confident, circle 5 if you were not confident at all and if you were somewhere in the middle, circle 2, 3 or 4.

**1 2 3 4 5**

2. Now that you have had the training, how confident are you about riding the bus? Circle 1 if you are very confident, circle 5 if you are not confident at all and if you are somewhere in the middle, circle 2, 3 or 4.

**1 2 3 4 5**

3. What about BART? When you began the session, how confident did you feel about riding BART. Did you feel? Circle 1 if you were very confident, circle 5 if you were not confident at all and if you somewhere in the middle, circle 2, 3 or 4.

**1 2 3 4 5**

4. Now that you have had the training, how confident are you about riding BART? Circle 1 if you are very confident, circle 5 if you are not confident at all and if you are somewhere in the middle, circle 2, 3 or 4.

**1 2 3 4 5**

5. What two things did you learn about riding public transit?

1. \_\_\_\_\_

2. \_\_\_\_\_

6. Would you recommend this travel training to a friend or family members?

Yes

No

7. What would make the training better?

***Thank you for you time. We appreciate your contribution to this session.***

## Sample Form—Program Coordinator Evaluation Worksheet

Program/Training \_\_\_\_\_

Date Began \_\_\_\_\_ Date Completed \_\_\_\_\_

### CONTENT:

Strengths:

Areas for Improvement:

### PROMOTION:

Successful Exposure Areas:

Least Successful:

Areas for Improvement:

### TARGET AUDIENCE:

Who was the target audience?

Who participated in the program?

What changes in the participants were observed?

What changes were planned for, but did not occur?

What area(s) in the program can be changed to address these issues?

What sources should be consulted to facilitate this change?

## Sample Form—Post Training Survey

### POST TRAVEL TRAINING SURVEY

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Nelson\Nygaard Consulting Associates 2008

**Good Day. Nelson\Nygaard created the travel training class that you recently took part in. We are conducting a survey of all those who took part in the classes to find out what you thought about the training, and whether you have tried using the bus or BART, or use it more often, since taking the training. Your answers will help us improve the travel training program, as well as give us ideas about how public transit can work better for seniors in Alameda County.**

**Your responses to this survey will be CONFIDENTIAL. The survey will only take about fifteen minutes to complete. When you have filled out the form, please put it in the enclosed envelope and return it by June 23<sup>rd</sup>.**

1. The training (check all that apply)

- gave me confidence that I could ride the bus
- gave me confidence that I could ride BART
- helped me understand and use the schedules
- helped me find the location of my destination and what bus or BART stops I should use
- showed me how to get and pay for tickets
- did not tell me anything I did not already know
- was too confusing for me to use buses or BART

2a. If the training gave you confidence, how did it help?

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---

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2b. If the training did not help or you're not sure that it did, what would have made the training more helpful for you?

---

---

---

3. Is there a difference between how often the bus or trains run during the day-time compared to evenings and weekends?

- Yes
- No
- Not Sure

4. If you want to use public transportation to take a trip, how will you find out the information you need? Please check all that apply.

- Ask a family member or friend or someone in the community
- Use a paper schedule or map
- Use the Internet (such as AC Transit website, BART website, 511 website)
- Read brochures
- Call 511 transit & traffic information phone line
- Other (please explain): \_\_\_\_\_
- Does not apply to me: I do not plan to use public transit.

5. What is the AC Transit bus fare for senior citizens? \_\_\_\_\_

- Not Sure

6. How would you find out how much it costs to ride BART?

\_\_\_\_\_  
\_\_\_\_\_

- Not Sure

7. Where on the bus are the seats reserved for seniors located?

\_\_\_\_\_

- Not Sure

8. Do you know how to request a stop when you are riding on the bus?

- Yes (please indicate) \_\_\_\_\_
- No
- Not Sure

**The next section is an evaluation of the Travel Training class you took. Your answers will help us improve the class.**

1. How helpful was the **classroom talk** on AC Transit and BART in helping you become more comfortable riding transit?

- Very helpful
- A little bit helpful
- Not sure
- Not helpful

Please explain:

---

---

2. Do you have any suggestions on how to improve the **classroom part** of the training? Please explain:

---

---

---

3. How helpful was traveling together—the **travel part**—in getting more comfortable with riding transit?

- Very helpful
- A little bit helpful
- Not sure
- Not helpful

Please explain:

---

---

4. Do you have any comments on how to improve the **travel part**? Please explain:

---

---

---

5. Do you have any comments about the **overall training**?

---

---

**Now we have some questions about how you currently get around:**

1. Do you currently drive a car?
  - Yes
  - No
  
2. Please tell us the type of transportation you use **one or more times per week**. Please check all that apply.
  - Personal automobile
  - Ride in a car with family or friends
  - AC Transit bus
  - Paratransit
  - BART
  - Contra Costa County Connection
  - VTA (San Jose and Santa Clara County)
  - Bike
  - Walk
  - Carpool
  - Other (please specify) \_\_\_\_\_
  - None
  
3. How often do you use public transportation (bus or train)?
  - Every day
  - Once or more times a week
  - A few times a month
  - About once a month
  - A few times a year
  - Never
  
4. Would any of the following things help you be more comfortable taking public transportation more often? Please check all that apply.
  - Someone who could answer questions I have
  - More practice using maps and timetables
  - Someone to ride with
  - Other (please specify) \_\_\_\_\_

**Thank you very much for taking the time to answer this survey.**

## Travel Training Consent Form Release of Information Authorization

I, \_\_\_\_\_ (Trainee) hereby agree to participate in ACTIA's Travel Training Program.

- I hereby give permission for ACTIA's staff, volunteers, and/or a contracted, travel trainer to provide travel training based on the individualized goal and plan established by the Trainee and ACTIA.
- I understand that travel training involves walking within the community, crossing intersections, and riding buses and BART in all types of weather.
- I also understand that ACTIA, and its employees, agents, contractors and/or volunteers, and the Trainer, make no promise that I will be able to use public transportation independently upon completion of the ACTIA Travel Training Program.
- I have had the opportunity to discuss the ACTIA Travel Training Program with the Trainer and to ask questions.

I understand and agree that the decision to use public transportation alone or without assistance after completion of the ACTIA Travel Training Program rests with me as the Trainee.

I further acknowledge and agree that ACTIA will not be financially responsible, and I hereby waive and release ACTIA, its employees, board members, contractors, agents, and volunteers and the Trainer for any damages, injuries, or other liabilities I sustain while participating in the ACTIA Travel Training Program or using public transportation after completion of the travel training program, except with respect to damages, injuries or other liabilities caused by the gross negligence or intentional misconduct of the Trainer and/or ACTIA, its employees and/or its agents.

**TRAINEE**

**DATE**

**TRAVEL TRAINER**

**DATE**

## **APPENDIX 3**

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### COMMUNITY PRESENTATIONS



## **Keeping Your Mobility Independence (15 Minute Presentation)**

### *Goals and Objectives*

The goal of this session is to introduce audiences who drive to public transit as an option to using the car keys.

At the end of this class, audience members will be able to:

1. Name three new ways to get around without the car
2. Understand how travel training can assist them

To help the audience better remember your messages, write the topics on a flipchart or blackboard. Use the handouts as reminders for audiences for future actions and discussion with friends and relatives.

The main message today: You have more than the car keys to get around.

### **Introduction**

Provide a brief introduction about yourself.

### **I. The Importance of Mobility Freedom**

*Facilitator:* Let's begin by each of you placing your car keys on the table. Now imagine that today, I am collecting all the keys and you will not be able to drive.

Tell me your first reaction.

*Get feedback from the audience.*

*Facilitator:* Now, tell me how you will get done all the things on your list to do today. What are your options?

*Get feedback from the audience.*

### **II. Brainstorming Other Options**

*Facilitator:* Let's talk about how you might be able to maintain your freedom by selecting from all your options to get around. Driving is an option, but it does have limitations.

What are the advantages of driving?

*Audience might say: convenience, easy to carry grocery bags, faster than walking, no waiting for buses or missing connections*

*Facilitator:* What are the disadvantages?

*Audience might say: parking, traffic, gas prices, other drivers, increases my stress level*

*Facilitator: We have advantages to driving and disadvantages. Let's look at advantages to taking a bus. What are those?*

*You may need to prompt the Audience with some advantages: no problems with parking, you don't need to worry about traffic, cost for a round trip bus ride is equal to a gallon of gas, can be less stressful, easier on the environment*

*Facilitator: We have advantages to taking BART. What are those?*

*You may need to prompt the Audience with some advantages: Faster to get longer distances, no problems with parking in the city or parking costs, covered stations are more comfortable than bus shelters. Fare to places like San Francisco is cheaper than paying the bridge toll and gas. Trains run regularly.*

*You may want to note that AARP has estimated that it costs .75 per mile to drive if you include insurance, tags, gas and maintenance*

*Facilitator: Think about when would be the best time to drive, take the bus, take a BART or take a taxi.*

- 1) What about going to an event, a museum in San Francisco. What might be easiest? BART or Transbay Bus?
- 2) What about getting to important appointments when you are taking medications such as cold medications that impair your driving? Would a taxi or bus be better?
- 3) Are there places where you go where parking is a problem? What are other situations where driving might not be the best option?

*Get feedback from the audience.*

If you don't know, I invite you to join our upcoming travel training class. We can open a new world of transportation freedom giving you many options to getting around.

## **Keeping Your Mobility Independence (15 Minute Presentation)**

### *Goals and Objectives*

The goal of this session is to introduce audiences who usually don't drive to public transit. The audience may be people who have recently moved to an area, usually only travel with family members or only use the bus occasionally.

At the end of this class, audience members will be able to:

1. Name three places where public transit will go
2. Understand how travel training can assist them

To help the audience better remember your messages, write the topics on a flipchart or blackboard. Use the handouts as reminders for audiences for future actions and discussion with friends and relatives.

The main message today: Freedom to get around is important and transit can help

### **Introduction**

Provide a brief introduction about yourself.

### **I. The Importance of Mobility Freedom**

*Facilitator:* I'm here today to talk about the importance of getting around. Let's begin by talking about where you usually like to go during a week.

Where do you usually go during a week?

*Write down answers in a left hand column*

*Audience members might say: grocery shopping, to the beauty parlor or barber, to the doctor, to visit friends, to their house of worship, to the senior center, to visitor volunteer at museums, libraries, hospitals or to see a play or musical production*

*Facilitator:* These are very important places to go for each of us. Now that we have this good list, let's put how you get there in the right column.

How do you get to these places?

*Write down the answers for means to transportation in the right column opposite to each destination in the left column. Note whether most of these are done by car or bus.*

*Start a new sheet.*

*Facilitator:* Now let's dream a little. Where are places you'd like to go around the Bay area that you don't make it to?

*Write down these places.*

## II. How Do We Get There?

*Facilitator:* We have a good list that we will get back to. I'd like you to play along with my short little transportation quiz. As a group, you can shout out the answers if you know them or even what to guess.

1. How many cities can you visit if you ride BART?
  - a. 22
  - b. 5
  - c. 10
  - d. 50

The answer is 22

2. How many connections are there between BART and buses
  - a. 25
  - b. 88
  - c. 100
  - d. over 240

The answer is 240

3. How many bus lines does AC transit operate?
  - a. 105
  - b. 54
  - c. 75
  - d. 90

The answer is 105

4. How many stops do the buses make?
  - a. 6,500
  - b. 200
  - c. 1,000
  - d. 800

The answer is 6,500

*Facilitator:* How did you do? Did you guess most of the answers?

The point I want to make is that between riding BART and the bus, you can get so many places.

*Handout the brochure "Getting There on Transit"*

To learn how to get to where you want to go, I invite you to join our travel training class.

## **APPENDIX 4**

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### PARTICIPANT WORKBOOK



[Your logo]

[Host organization name]

## **Travel Training Workbook**

- Notes Page
- Trip Planning Worksheet
- Contact Information for Alameda County Transit Agencies
- Information on Bus Accessibility Features

[Date of training]



# Trip Planning Worksheet

<b>GOING THERE</b>	<i>Notes:</i>
Starting Address/Intersection: _____	Route Number: _____
Destination Address/Intersection: _____	Location of Bus Stop: _____
I want to: (choose one)	Scheduled Boarding Time: _____
<input type="checkbox"/> Depart around: _____ am pm	Scheduled Arrival Time: _____
<input type="checkbox"/> Arrive around: _____ am pm	Next Bus (same route): _____
Day of the week: _____	Alternate Route (if any): _____
	Price of Trip: _____
	Other Notes: _____ _____

<b>COMING BACK</b>	<i>Notes:</i>
Starting Address/Intersection: _____	Route Number: _____
Destination Address/Intersection: _____	Location of Bus Stop: _____
I want to: (choose one)	Scheduled Boarding Time: _____
<input type="checkbox"/> Depart After: _____ am pm	Scheduled Arrival Time: _____
<input type="checkbox"/> Arrive After: _____ am pm	Next Bus (same route): _____
Day of the week: _____	Alternate Route (if any): _____
	Price of Trip: _____
	Other Notes: _____ _____

## **Contacting Transit Agencies for Information or Assistance**

### **AC Transit**

**Travel information:** (510) 817-1717 or 511. This line is staffed between 7:00 a.m. and 7:00 p.m. To speak with someone about AC Transit services, say “AC Transit” as soon as your call is answered. The voice recognition system will forward you to a representative. (AC Transit travel information is provided through 511, the Bay Area’s free phone and web service consolidating transportation information.)

**Website:** [www.actransit.org](http://www.actransit.org). Information also available at [www.511.org](http://www.511.org).

### **WHEELS**

**Travel information:** (925) 455-7500, between the hours of 5:00 a.m.-6:30 p.m. Monday through Friday, or 10:00 a.m.-4:30 p.m. on Saturdays. After hours, calls are forwarded to the WHEELS dispatch office. You can also call 511 and say “Transit” and then “Wheels.”

**Website:** [www.wheelsbus.com](http://www.wheelsbus.com). Information also available at [www.511.org](http://www.511.org).

### **Union City Transit**

**Travel information:** (510) 471-1411, during hours that Union City Transit operates: 4:15 a.m.-10:25 p.m. Monday-Friday; 7:00 a.m.-7:30 p.m. on Saturdays; and 8:00 a.m.-6:30 p.m. on Sundays. You can also call 511 and say “Transit” and then “Union City Transit.”

**Website:** <http://www.ci.union-city.ca.us/transit/uctransit.htm>. Information also available at [www.511.org](http://www.511.org).

### **BART**

**Travel information:** Available between the hours of 6:00 a.m. and 11:00 p.m., seven days a week.

- In Berkeley, Oakland, and San Leandro: (510) 465-BART
  - In Fremont, Union City, Castro Valley, and Hayward: (510) 441-BART
- You can also call 511 and say “Transit” and then “BART.”

**Website:** [www.bart.gov](http://www.bart.gov). Information also available at [www.511.org](http://www.511.org).

## Accessibility Features of Alameda County Buses

The table below summarizes the features found on buses in Alameda County that make vehicles easier to use. These features include:

- **Low-floor vehicles**—buses with lower floors that reduce the need to use multiple high steps when boarding or alighting
- **Kneeling buses**—buses that allow the driver to lower the entrance of the bus to a level closer to that of the curb or street
- **Lifts or ramps**—devices for allowing people using wheelchairs or people (not using wheelchairs) who have difficulty boarding or alighting transit vehicles due to steps to board and alight.

Vehicles vary between transit agencies and even within the fleet of a single agency. The table shows the types of accessibility features currently used by each agency.

Agency	Low-floor vehicles?	Kneeling buses?	Lifts or ramps deployed for ambulatory individuals?
AC Transit	Mix of low-floor and high-floor vehicles.	All vehicles kneel.	Lifts and ramps used. Ambulatory individuals can request the driver to deploy them.
LAVTA	All vehicles are low-floors.	Vehicles also kneel.	All vehicles use ramps. Ambulatory individuals can request the driver to deploy them.
Union City	Ordering some low-floor buses in the Fall of 2007 (none presently in the fleet).	All but two vehicles are kneeling buses.	All vehicles use lifts. Ambulatory individuals can request the driver to deploy them.



## **APPENDIX 5**

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### **SAMPLE PRE-TRAINING CHECKLIST**



## SAMPLE PRE-TRAINING CHECKLIST

### Facility

- Set-up with wide front wall for charts and projection
- Decide arrangement of tables/chairs (best = small tables arranged in semi-circle facing front wall)
- Water available? Refreshments? If yes, how/where set up?
- Location of restrooms
- Room open at what time: \_\_\_\_\_
- If lunch, constraints?

### Everyone know where and what time to meet?

- Liaison
- Assistants
- City staff
- Workshop leader
- Participants

### Materials

- mobile phone numbers for all key people – workshop leader, assistants, site liaison, staff
- Blank chart paper
- Folders for transit information
- Pocket timetables – for routes to be used on field outing and other timetables – check – do we have the ones that are most up-to-date?
- Sign-in sheet
- Customized handouts (e.g. in appropriate language, customized to this group)
  - o Agenda
  - o Fares
  - o Where to get more information
  - o worksheet
- Markers
- Name tags
- Enlargement of relevant line(s)/route maps (2-week notice to AC Transit)
- AC Transit map to post, showing likely destination points
- Pens – red pens and highlighters, also regular pens
- Projector and laptop
- PowerPoint files: AC Transit, BART
- Video: “What Transit Can Do for You”
- Camera
- Bell with gentle tone to get group’s attention during table work

Other Info

- Upcoming trainings?
- Business cards or contact info for assistants to share with participants

Pre-made Charts

- Overview of the workshop
- Other?

Field Outing

- Waivers
- BART and AC Transit passes and holders
- Cash or tix for non-senior riders (e.g. assistants)
- All timing/bus stops confirmed?
- Back-up plan in case we miss connection?
- AC Transit supervisors on alert?
- Food stop needed? If so, where?
- Location of restrooms while on field outing?
- Info ready for folks who may want to return on their own?
- Establish gathering times for setting out and return

## **APPENDIX 6**

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### SAMPLE TEACHING POINTS FOR OUTINGS



## Sample Teaching Points for Field Outings

### AT THE GATHERING POINT

- The free tickets
  - Are money
  - Can't be used by your kids/adults ☺... must be accompanied by proper identification
  - Discount tix cannot be purchased at MOST BART stations, but can be purchased at grocery stores and elsewhere
- Taking with/planning
  - Identification
  - Change for payphone or mobile phone
  - Water
  - Restrooms
  - Maps/timetables
- pedestrian safety
  - note factors which make us ignore what we know... rushing for a bus or train
- Emphasize – it's easy to be distracted and follow everyone else, but this is your chance to learn, so challenge yourself to imagine, "what would I do now if I were on my own? What questions do I have for next time?"

### WHILE WAITING FOR BUS

- Hailing bus – standing; relaxed raise of hand (not agitated waving)
- using colored laminated flash cards
  - get a volunteer
- bus stop
  - locating bus stops
  - bus stops across street for opposite directions
  - some bus stops show timepoints, have shelter (e.g. at senior center), others don't
- noting destination signage on buses
- hailing driver
  - lifted arm versus agitated waving
- using tickets/paying fare

### ON THE BUS

- paying fare
- reserved seats in the front
  - emphasize "federal law"
  - self-advocacy
  - move to front for safety
- signaling for a stop

- getting off – back door challenges of old buses; note front door as alternative
- staying together when we get off

### **OUTSIDE BART**

- Note all the buses that depart from BART! Show location of VTA buses at Fremont BART
- Use of parking at BART — must remember space number, and pay at Addfare machine

### **AT BART STATION**

- Note informational features of BART station
  - Mini-map of street around BART station
  - Mini-map of bus stop locations
  - Pocket timetables
  - Board showing train departure times for this station
  - Board showing pocket timetables with bus departures from BART highlighted
  - Pamphlets
- Ticket Purchase
  - Workshop Leader purchase a ticket via a volunteer.
    - Finding fare depending on destination
    - Cash versus credit card, versus ATM
    - Minimum needed to enter
    - What happens if you don't have enough to exit (good idea to underpay, so you can show use of Addfare machine later)
- Faregates
  - Entries versus exits
  - Enlarged faregates for baggage/wheelchairs
  - Bus-to-BART transfer machines
  - Addfare/parking payment machines
- Getting to platform
  - Some stations have one platform (as at Fremont BART); others have multiple. Signage helps.
  - Remember: BART lines are named for their terminus points
  - Escalator, stairs, and elevators.
- Destination signs over platforms
- Boarding & Safety
  - stay behind yellow line

- watch the gap
  - Variable lengths of trains determine whether okay to board at ends, or only at center
  - Black rectangles indicate boarding positions
- Seating for seniors and people with disabilities
- Ability to move between cars
- System maps in cars, review meaning of colors
- Driver call boxes at end of cars

