COMPLETE TRIP

ITS4US

Task 9 Training:
Participant Training and Stakeholder Education Plan
Deborah Curtis
Highway Research Engineer
Office of Operations Research and Development
Program Overview
Complete Trip - ITS4US Deployment Program

- A USDOT Multimodal Deployment effort, led by ITS JPO and supported by OST, FHWA and FTA
- Supports multiple large-scale replicable deployments to address the challenges of planning and executing all segments of a complete trip.

**Vision**

*Innovative and integrated complete trip deployments to support seamless travel for all users across all modes, regardless of location, income, or disability.*
Program Goals

- Spur high-impact integrated Complete Trip deployments nationwide
- Identify needs and challenges by populations
- Develop and deploy mobility solutions that meet user needs
- Measure impact of integrated deployments
- Identify replicable solutions and disseminate lessons learned
Complete Trip Phase 1 Awardees

University of Washington
OR, WA, MD

California Association of Coordinated Transportation
CA, OR, and WA

Heart of Iowa Regional Transit Agency
Dallas County, IA

ICF
Buffalo, NY

Atlanta Regional Commission
Gwinnett County, GA
Deployment Phases

**PHASE 1: Concept Development**
- Concept Development for Complete Trip Deployment
- Establish Cohort Roundtables

**PHASE 2: Design & Test**
- Design, Test and Deploy Complete Trip Solutions
- Evaluation Framework and Planning

**PHASE 3: Operate & Evaluate**
- Demonstrate Multiple Large-Scale Deployments
- Evaluate Deployments
- Share Data & Lessons Learned

**Operations Maintenance**
- Sustain operations for a minimum period of five years after the program is completed with no supplementary federal funds

**Deployment**
- Up to 12 months
- Up to 24 months
- Minimum of 18 months

**Post-Deployment**
- 5 years
COMPLETE TRIP

ITS4US

Task 9 Training:
Participant Training and Stakeholder Education Plan (PTSEP)
Dawn Sweet
Director, Headquarters of Operations
Federal Transit Administration (FTA)
Office of Civil Rights
Agenda

- Participant Training and Stakeholder Education Plan (Task 9) Overview

- Participant Training and Stakeholder Education Plan Template
  - Introduction
  - Identification of Participants and Necessary Training
  - Participant Eligibility, Recruitment, Selection, and Retention
  - Training Methodology
  - Training Assessment
  - Planning and Coordination of Training Activities

- Final Thoughts
  - Options for Plan Structure
  - Useful References
  - Stay Connected
Participant Training and Stakeholder Education Plan (PTSEJP) Overview
Participant Training and Stakeholder Education Plan

Describes the needs and plans for recruitment and training of all populations of travelers and other individuals participating in the deployment, including caregivers as appropriate and any staff associated with deployment, operations and maintenance.
Participant Training and Stakeholder Education
Plan Interdependencies

Inputs

Participant and Stakeholder Planning

- Task 2: ConOps
- Task 4: Safety Mgmt.
- Task 8: Human Use

Training Plan

- Training Needs
- Stakeholder Identification
- Recruitment
- Training
- Stakeholder Education

Outputs

Training and Education

- Task 11: Outreach
- Task 13: ICTD Plan
## Deliverables

<table>
<thead>
<tr>
<th>ID</th>
<th>BAA Section</th>
<th>Task 9: Participant Training and Stakeholder Education Plan</th>
<th>Due Date</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1T09D1</td>
<td>5.9</td>
<td>Participant Training and Stakeholder Education Plan Draft</td>
<td>12/06/2021</td>
<td>Word</td>
</tr>
<tr>
<td>P1T09D2</td>
<td>5.9</td>
<td>Participant Training and Stakeholder Education Plan Final</td>
<td>01/03/2022</td>
<td>Word</td>
</tr>
</tbody>
</table>
### Participant Training and Stakeholder Education
### Plan Major Components

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training Needs</strong></td>
<td>Identify needs for training based on deployment plans, Human Use Approval and Safety Management Plan.</td>
</tr>
<tr>
<td><strong>Stakeholder Identification</strong></td>
<td>Partition Stakeholder Registry into groups that require training, vs. groups that provide supporting input, or require outreach.</td>
</tr>
<tr>
<td><strong>Recruitment</strong></td>
<td>Describe plans for soliciting potential participants from relevant groups, based on planned IRB protocol.</td>
</tr>
<tr>
<td><strong>Training</strong></td>
<td>Discuss training approach and materials for each relevant group and deployment area, for participants and other roles.</td>
</tr>
<tr>
<td><strong>Stakeholder Education</strong></td>
<td>Inform stakeholders about scope and goals of deployment; attract interest in involvement, ensure sustainability of deployment.</td>
</tr>
</tbody>
</table>
PTSEP Template Sections
Section 1: Introduction

- Section 1 of the PTESP should address:
  
  - **Document Purpose**: Discuss the purpose of the PTESP and how it will guide all training and education efforts for the remainder of the project lifecycle.
  
  - **Project Overview**: Provide a high-level overview of the project.
Section 2: Identification of Participants and Necessary Training (1/2)

- Section 2 of the PTSEP should address:
  - Identify Project Participant Groups & Subgroups: Break project participants into smaller groups by roles and responsibilities.
  - Identify Trainers: Note participants that will train other participants.
  - Describe Roles and Responsibilities: Describe role(s) and responsibilities assigned to the participant group.
Section 2: Identification of Participants and Necessary Training (2/2)

- Examples of Participants*:
  - **Travelers & Caregivers**: Include all populations of travelers identified in the needs analysis and potential caregivers.
  - **Participating Personnel**: Including personnel from local agencies, transit agencies, planning organizations, private sector firms, disability organizations, advocacy organizations and specialized service organizations for the population of focus in the deployment.

- Transit Agency Staff Subgroup Example: Dividing staff into different subgroups based on their operational roles: dispatch/operations management, vehicle operators, road supervisors, maintenance technicians, etc.

*See Section 5.9 of the BAA
Section 3: Participant Eligibility, Recruitment, Selection, and Retention

- Section 3 of the PTSEP should address:
  - **Eligibility**: Discuss conditions that must be met to be eligible to participate in the deployment and align with a group.
  - **Recruitment and Selection**: Describe how participants will be recruited by project and any selection processes to limit group size during demonstration phase.
  - **Retention**: Describe any challenges identified with retaining participants during the project and potential solutions.
Section 4: Training Methodology

- Section 4 of the PTSEP should address:

  - **Training Objectives**: Describe any objectives and/or competencies/knowledge the trainee should have after completing the training.

  - **Key Content Areas/Training Topics**: Provide a brief overview or outline of what topics will be covered during the training session/module.

  - **Training Format and Materials to be Used**: Describe the anticipated format(s) for the training and materials to be used for this group.
Section 5: Training Assessment

Section 5 of the PTSEP should address:

- **Knowledge Assessments After Training:** Describe the assessment method(s) that are planned to be used to determine if a participant has acquired the necessary skill(s) or information to proceed with participating in the deployment, if necessary.

- **Participant Feedback:** Discuss how participant feedback will be solicited and how suggestions for improvement may be incorporated in updates to the training. Discuss whether there are intentions to update training materials (even if only for some groups) on a regular basis (e.g., quarterly, annually) throughout the project lifecycle.
Section 6: Planning and Coordination of Training Activities

- Section 6 of the PTSEP should identify any needs for coordination with other entities and any known lead times for working with them. Information can be provided in a narrative of table format. An example has been provided below:

<table>
<thead>
<tr>
<th>Training Activity</th>
<th>Coordinating Entity</th>
<th>Coordination Needs (services, facilities, and equipment)</th>
<th>Anticipated Lead Time Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle operator testing</td>
<td>Garage Operations Manager &amp; Garage</td>
<td>Need 1 vehicle and parking lot space to perform operator testing during every shift during September 2023.</td>
<td>16 weeks. Additional extra board shifts need to be added to next pick to accommodate training &amp; testing for all operators during a normal shift.</td>
</tr>
<tr>
<td></td>
<td>Maintenance Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accessible format materials</td>
<td>State DOT (via on-call contractors)</td>
<td>Translate, convert, and transcribe training materials</td>
<td>3 months from material finalization</td>
</tr>
</tbody>
</table>
Final Thoughts
Options for Plan Structure (Part 1)

<table>
<thead>
<tr>
<th>Sections</th>
<th>Participant Group 1</th>
<th>Participant Group 2</th>
<th>Participant Group 3</th>
<th>Subgroup 3A</th>
<th>Subgroup 3B</th>
<th>Participant Group 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligibility</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment and Selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Objectives</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key Content Areas/Training Topics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Media and Materials to be Used</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledge Assessments After Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participant Feedback</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning and Coordination of Training Activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Options for Plan Structure (Part 2)

<table>
<thead>
<tr>
<th>Sections</th>
<th>Participant Group 1</th>
<th>Participant Group 2</th>
<th>Participant Group 3</th>
<th>Subgroup 3A</th>
<th>Subgroup 3B</th>
<th>Participant Group 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligibility</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment and Selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Objectives</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key Content Areas/Training Topics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Media and Materials to be Used</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledge Assessments After Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participant Feedback</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning and Coordination of Training Activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Project-level Discussion*
# Options for Plan Structure (Part 3)

<table>
<thead>
<tr>
<th>Sections</th>
<th>Participant Group 1</th>
<th>Participant Group 2</th>
<th>Participant Group 3</th>
<th>Participant Group 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligibility</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment and Selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Objectives</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key Content Areas/Training Topics</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Media and Materials to be Used</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledge Assessments After Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participant Feedback</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning and Coordination of Training Activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Participant Groups**

**Project-level Discussion**
Participant Training Key References

- ITS Professional Capacity Building Program website: https://www.pcb.its.dot.gov/

Connected Vehicle Pilots:
- Connected Vehicle Pilot Deployment Program Phase 1, Participant Training and Stakeholder Education Plan – Tampa (THEA). FHWA-JPO-16-318 (group-based)
- Connected Vehicle Pilot Deployment Program Phase 1, Participant Training and Stakeholder Education Plan – New York City. FHWA-JPO-16-306 (area-based)
- Connected Vehicle Pilot Deployment Program Phase 1, Participant Training and Education Plan – ICF/Wyoming. FHWA-JPO-16-294 (area-based)
Stay Connected

For more information please contact:

Elina Zlotchenko, ITS JPO
ITS4US Program Manager
Elina.Zlotchenko@dot.gov

Dawn Sweet, FTA Office of Civil Rights
ITS4US Participant Training and Stakeholder Education Lead
Dawn.Sweet@dot.gov

Visit the Complete Trip - ITS4US Deployment Program Website and FAQs:
https://its.dot.gov/its4us/
https://www.its.dot.gov/its4us/its4us_faq.htm
Any questions?