



**STRATEGIC PLAN**  
**TRANSFORM **

JANUARY 2023

 **Bloomington Transit**

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## GLOSSARY

**BEB Battery-Electric Bus:** A bus powered by rechargeable batteries. BEBs are one type of zero-emissions vehicle.

**BPTC Bloomington Public Transit Corporation:** The agency chartered to provide public transportation services within the City of Bloomington.

**BT Bloomington Transit:** The brand name for fixed-route transit service operated by BPTC.

**CAD/AVL Computer-Aided Dispatch / Automatic Vehicle Location:** Systems that allow for the real-time tracking of vehicle location. Information provided by CAD/AVL systems can be used to monitor operations and provide information to customers.

**LIT Local Income Tax:** In 2022, the City of Bloomington increased its local income tax and designated a portion to BPTC for expanded public transit.

**PPP Public Participation Plan:** A document detailing the ongoing and regular efforts the agency will make to solicit the public's input and notify them of the agency's activities.

**TDM Transportation Demand Management:** Programs responsible for promoting, incentivizing, and making it easier for the public to use transportation alternatives like transit, bicycling, and walking.

**TNC Transportation Network Company:** A company that uses the internet-based technology to facilitate rides between customers and drivers operating private vehicles. Lyft and Uber are two examples of large TNCs.

**ZEV Zero-Emissions Vehicle:** Any vehicle whose operation does not result in the release of greenhouse gases; battery-electric buses are an example.





## LETTER FROM THE BOARD CHAIR

I'm proud to present Transform BT, the 10-year strategic plan for the Bloomington Public Transportation Corporation. This plan is a roadmap to cement BPTC as an innovative, dynamic agency responsible for providing transportation solutions to the greater Bloomington community. The plan also provides a timeline of actions and metrics by which we plan to judge our progress. We hope you see these tools of accountability as a sign of our agency's commitment to serving our community.

While we were drafting this plan, we knew we needed to be focused on our customers. That includes the people who rely on BPTC to get around; the students at Indiana University who ride the bus to and from class; people who take the bus to get to work and do their shopping; and the people with disabilities who depend upon BT Access to get to appointments and visit friends and family.

But our riders aren't BPTC's only customers. A customer is anyone who depends on our services for any reason. A person who rides the bus to work is our customer, but so is their employer. The high school student who rides the bus to the library is a customer, but so are that child's parents. The residents of Bloomington who care about reducing pollution and the organizations that support Bloomington's economic development—they are our customers as well.

To make sure our plan encompasses the views of all our customers, our team conducted engagement with our partners, our employees, and members of the public. We heard a lot of suggestions for how to improve our service, and we made sure to incorporate as many as we could into this plan. We also heard our community's tremendous support for public transportation and its desire for an expansion of mobility options. We are grateful for the support, and we intend to rise to the challenge.

Meeting our customers' expectations will require us to take a comprehensive view of Bloomington's transportation needs. In the coming years, we will embrace new types of services like microtransit, coordinate more closely with our partners, and use technology to help create a seamless customer experience across various modes. We believe that this approach, called mobility management, is the best way to improve transportation in our community. Transform BT also includes strategies to help us recruit and retain workers, especially bus operators and mechanics, whose work is essential to all the other improvements we plan to make.

We also know we can't do it alone. Many of the actions outlined in this plan will require the support and cooperation of our partners in city and county government, at Indiana University, and at many other institutions. Let's work together to ensure that Bloomington's mobility system fulfills the needs of our entire community.

With gratitude for your support,

  
James McLary



# Introduction and Background





## Background

In 1982, the City of Bloomington passed an ordinance creating the Bloomington Public Transportation Corporation (BPTC) to operate fixed-route bus service in the City. Two years later, our community's fixed-route bus service, Bloomington Transit (BT), was launched.

From our first year of operation through 2014, BT experienced nearly continuous growth in ridership, reaching a peak of about 3.5 million annual trips. Around 70 percent of BT's riders are students at Indiana University (IU), who ride fare free under a contract between the agency and the university. IU students can also travel via the university-operated Campus Bus, which is operated independently from—but shares maintenance and operations facilities with—BPTC.

Today, BPTC operates 13 routes and BT Access, a paratransit service for customers with disabilities. In 2022, we launched a microtransit pilot to increase mobility to customers within a designated zone of the City during hours when fixed-route service is unavailable. In 2021, our bus system carried, on average, more passengers per bus-hour than the bus systems of major cities like Philadelphia and Seattle. BPTC's services play a critical role in supporting mobility, connecting people to opportunities, and reducing pollution in Bloomington.

**Even in 2021 when BPTC's ridership was severely impacted by COVID-19, the system provided an average of 16 trips for every Bloomington resident.**

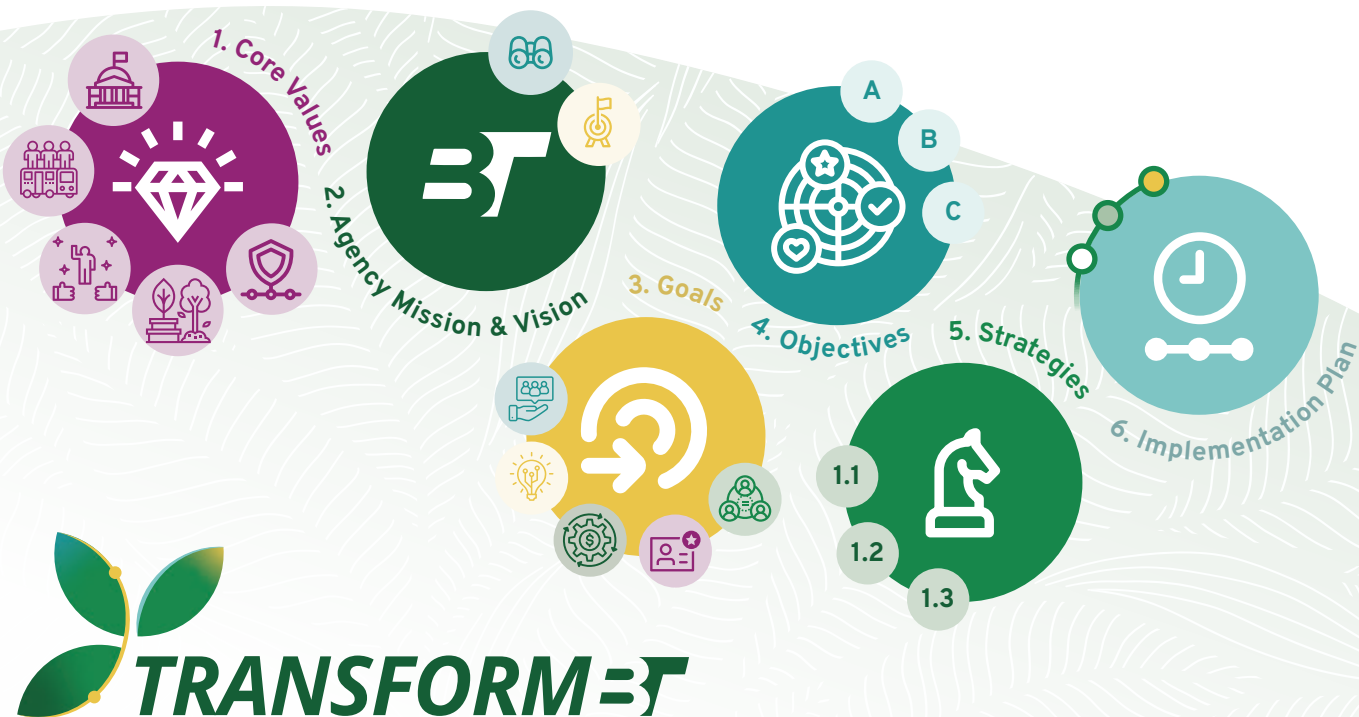
# Strategic Plan Elements

BPTC faces challenges related both to agency needs and to customer travel behavior changes. We also have access to new resources and models for addressing those challenges. These new challenges and new resources are an opportunity for BPTC to transform into a national model for small and mid-size transit agencies—one that innovatively deploys new technologies and effectively manages and motivates our workforce to provide crucial services to our customers and community.

The plan identifies for us as well as our stakeholders a clear strategic framework including a vision, mission, goals, and objectives; a list of actions to achieve our vision; a timeline for their implementation; and a framework to assess progress. The strategic plan includes the following elements:

1. **Core Values**
2. **Agency Mission and Vision**
3. **Goals**
4. **Objectives**
5. **Strategies**
6. **Implementation Plan**

## Elements of the Strategic Plan





# Context for this Strategic Plan

In our four decades of operation, Bloomington Transit and BT Access have become essential services for our customers. Several trends—including national shifts in travel behavior, increased development in the City of Bloomington, changing political conditions, and technological advances—have prompted BPTC to reconsider how we can best serve the needs of our customers and our community, culminating in Transform BT. This plan sets our direction for the next ten years, identifying how we will tackle and meet the challenges of today and tomorrow.

## Continuing to Adapt to Changes in Travel Behavior

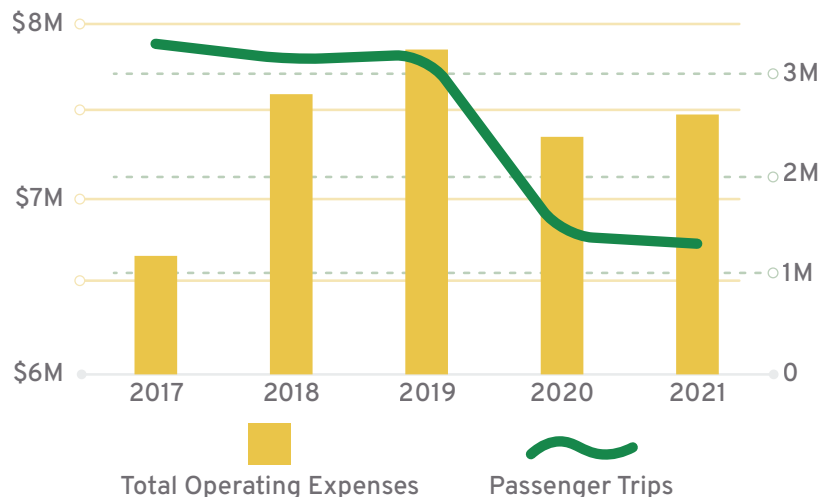
Between 2014 and 2019, BPTC ridership declined nine percent from 3.5 million to 3.2 million, reflecting national trends driven by a host of factors. These include competition from mobility services like Uber and Lyft, an increase in car ownership, and a reduction in travel demand due to the growing prevalence of online shopping and teleworking. Locally, new development around IU may have increased the proportion of students within walking or biking distance of campus and thus reduced the number of students taking the bus. The drop in ridership occurred even as operating costs per hour of service increased.

These changes prompted BPTC to consider how to continue to improve service for existing riders, attract new riders, and identify opportunities for increased efficiency. A 2019 Route Optimization Study recommended changes including:

- ▶ **Splitting routes that serve unrelated markets.**
- ▶ **Straightening circuitous routes to improve travel times.**
- ▶ **Providing access to new areas like Ivy Tech, Walmart, Tapp Road, and the Social Security Administration Office.**
- ▶ **Simplified and consolidated service.**

Implementation of the study's recommendations was dramatically interrupted by the COVID-19 pandemic, which resulted in a sharp drop in ridership and a variety of operational changes, such as the temporary suspension of fare collection. Today, we have begun developing plans for a more systematic, routine approach to service planning, including the development of a schedule for service updates, investments in system monitoring, increased community engagement, and adoption of new route-planning software.

**BPTC Operating Expenses and Passenger Trips, 2017-2021**

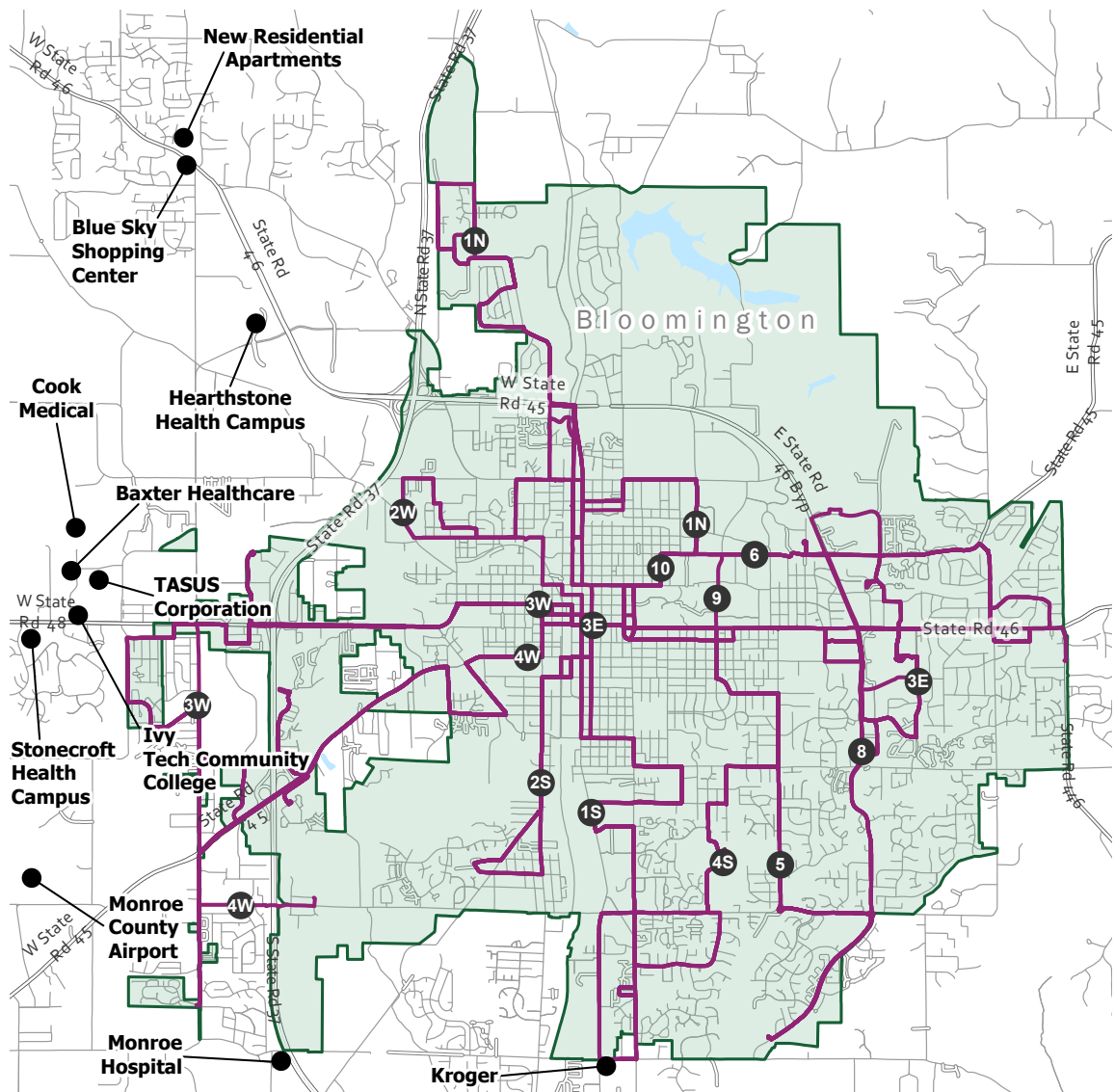


## Branching Out to Expand Service

Since BPTC began providing service in 1984, Bloomington has grown and developed considerably, both within the City limits and, increasingly, outside them. Today, major educational institutions such as Ivy Tech, medical destinations like Cook Medical and Baxter Healthcare, and commercial areas like Park 48 lie outside the City boundaries.

While development has spread beyond Bloomington's boundaries, our operations remain restricted within the City limits per the 1982 ordinance that created that agency. In recent years, the City of Bloomington has worked toward annexing some nearby areas, which would automatically expand the area eligible for BPTC service. However, there is uncertainty about whether some areas with high transit suitability and need will be annexed by the City in the coming years. Meeting our customers' travel needs means having the ability to serve destinations outside the City limits, both in the short and long term.

### Important Destinations Outside Bloomington City Limits





## An Aging Operations and Maintenance Facility

BPTC has also begun to experience challenges related to our operations and maintenance facility. Three decades of increasing ridership were accomplished without an expansion of the facility, which we share with Campus Bus, IU's campus bus system. BPTC's 2011 Facility Feasibility Study found that our current base of operations is inadequate to support future growth and that critical facility components are reaching the end of their useful lives. Addressing our facility needs is crucial to our core functioning—our ability to provide service, adopt new technologies, and attract and retain employees—as well as our strategic growth.

We will need to significantly expand the current building and site or construct a new one. Both approaches involve substantial investment and challenges. The existing facility and site sits on Indiana University property and cannot be expanded without acquiring adjacent property. A new property in a new location could allow BPTC to grow with fewer constraints, but a suitable site needs to be identified and acquired.

Upgrading the agency's facility, either through expansion or relocation, will require a reassessment of our relationship with Campus Bus and Indiana University. Increased organizational and operational integration will be required if our organizations are to jointly embark on a facility expansion. Alternatively, it is possible Indiana University could elect to function independently and operate out of a different facility.

## A Zero-Emissions Fleet

The need for an updated and expanded operating and maintenance facility is made more urgent by our plans to transition to a fleet of zero-emissions vehicles. In 2022, an Alternative Fuels Study evaluated the viability of various zero-emission technologies and concluded that, for reasons of cost and fuel supply, battery-electric buses (BEBs) are the vehicle technology of choice. We began our move toward a zero-emission fleet in 2022 when we adopted a resolution committing to a 100 percent zero-emission fleet by 2050 and allocated funds for the purchase of our first four BEBs. BPTC was awarded a \$7 million Low and No Emission (LoNo) Grant by the Federal Transit Administration in 2022, one of only two transit agencies in the state to receive funding that year. The infusion of federal funds will help accelerate our transition to electric buses. BPTC's existing facility does not have the space to accommodate a full BEB fleet and associated charging infrastructure.



## New Technologies and Mobility Management

The COVID-19 pandemic caused BPTC's ridership to drop by 60 percent and prompted us to innovate to deliver service under new and unfamiliar circumstances. One such innovation is our microtransit pilot project, which currently provides subsidized Lyft and Uber rides within a designated zone after regular service hours. This service has allowed us to reallocate resources away from unproductive late-night bus service while continuing to provide transportation services to those who need them.

The microtransit pilot represents one of our first steps moving toward a different model for public transportation, which is called mobility management. Increasingly, transit agencies across the country are thinking of fixed-route service as just one mobility service among many that can serve the public well depending on the context. Other services include microtransit, micromobility (i.e., bike and scooter share), transportation demand management, ridesharing, and providing information to customers about all the mobility options in their region. The mobility management model allows agencies the flexibility to meet the transportation needs of their communities in the most effective manner available.

Many new and valuable mobility services rely on innovative technologies. For example, in the engagement activities conducted for this plan, riders and stakeholders repeatedly suggested we provide customers with timely updates about service changes and delays and develop a system that would allow customers to plan trips across multiple travel modes via an integrated smartphone app.

However, many of our systems—our fare collection equipment, employee management software, and processes for scheduling and maintenance—have not kept up with industry best practices and innovations. Our 2022 Technology Assessment identified several areas where new software and equipment could improve BPTC's operations. The assessment's recommendations touch on nearly all aspects of our operations, from human resources to fare collection to service planning.

## New Revenue Sources

BPTC has at its disposal two new sources of revenue available to support improvements to service and operations. First, in May 2022, The Bloomington City Council approved a local income tax (LIT), which is projected to provide \$3.8 million in dedicated funding annually that can cover both operating and capital expenses starting in 2023. These funds will support several BPTC projects, including:

1. A new East-West Rapid Transit Corridor.
2. Expanded microtransit/paratransit service.
3. Implementation of 30-minute bus headways during peak hours.
4. Implementation of increased Sunday service.
5. Creation of a new fare subsidy program.

Second, the federal Infrastructure Investment and Jobs Act (IIJA), passed in 2021, significantly increased federal funding for public transportation. BPTC is slated to receive a modest increase in federal formula funds, which support operations and capital expenses. More significantly, IIJA introduces new discretionary grant opportunities like the aforementioned \$7 million Lo-No grant we were awarded in 2022.







# Strategic Planning Process



Developing a strategic plan provides an organization clarity on its current capabilities and the conditions it faces, helps it better understand its role within the community, and enables it to establish a vision for the future. BPTC's Board of Directors, General Manager, and key staff developed the strategic plan over several months, beginning in July 2022. Public and stakeholder engagement informed every step in the process.





# Stakeholder and Public Engagement

To make sure the needs and opinions of BPTC’s community found their way into this plan we engaged with a wide variety of audiences, including:

- ▶ **Our Employees:**  
We held a focus group with staff representing a diverse cross-section of functions (operators, mechanics, supervisors, and administrative staff with various levels of tenure with BPTC). In addition, all employees received an engagement survey and had the option to complete it.
- ▶ **Our Partners:**  
We held a virtual focus group with key local partners, including elected officials (e.g., City and County Council members); City and County agencies (e.g., Go Bloomington, Housing and Neighborhood Development); Indiana University; and local nonprofits and community organizations (e.g., Area 10 Agency on Aging, Chamber of Commerce).
- ▶ **The Public:**  
We held a hybrid virtual/in-person public meeting open to all members of the public.

Key feedback from these engagement activities is summarized below.

## FRONTLINE AND OPERATIONS EMPLOYEES

Participants provided suggestions for how to make employees feel more valued, which was the factor employees told us was their top priority and would also help the organization attract and retain employees (see sidebar). Participating employees also said the agency should pursue improvements to communication processes and upgrades in technology across the organization. Additionally, they recommended the creation of a staff position to oversee the implementation of new technology systems, a suggestion addressed by [Strategy 2.3](#). Asked what the agency could do to better serve its customers, participants’ top recommendation was that the agency adopt a new, more accurate system for providing information on bus arrival times and schedule changes ([Strategy 2.6](#)).



## EMPLOYEE FEEDBACK

Employees were asked to suggest changes that could make BPTC more attractive to current and prospective employees. Some suggestions that were subsequently incorporated into this plan include:

More professional development  
([Strategy 3.5](#))

Increased employee recognition  
([Tactic 3.3.1](#))

Improved facility amenities  
([Strategy 2.1](#))

Schedule improvements  
([Strategy 3.7](#))

Improved communication  
([Tactic 3.2.1](#))

More protections for operators  
([Strategy 3.4](#))

Increased transparency  
([Tactic 3.1.2](#))

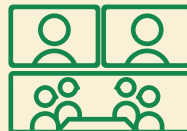
## PARTNERS ENGAGEMENT

Meeting participants repeatedly emphasized the need for improved service and were particularly enthusiastic about opportunities to serve important locations outside of the Bloomington City limits including Park 48, Ivy Tech, and other educational institutions. Participants also expressed a desire for us to engage in more regular planning and coordination with community partner agencies and organizations. They indicated we can play a more active role in supporting future development by assessing how well major projects accommodate public transit and by working with private partners to ensure future residential and job centers are properly connected to the transit network. Many participants found the partner engagement meeting itself a model for future collaboration; a venue that brings all the transportation stakeholders into the same room would be a great opportunity to discuss and work toward solving local mobility problems ([Strategy 1.5](#)).

## PUBLIC ENGAGEMENT

Meeting participants, most of whom are regular customers, offered suggestions for changes to BPTC service and amenities that would improve the customer experience including more frequent service, expanded coverage, and more hours of service. Many of those suggestions are featured as tactics in this plan (see sidebar).

Participants also requested better communication from the agency, particularly around service changes, delays, and construction impacts. The group had mixed feelings regarding the agency's microtransit pilot, noting that the service is an enhancement but doesn't easily accommodate children and presents doubts about safety or security for some people. Several participants also had concerns about the current quality of bus stops, waiting areas, and pedestrian and wheelchair user access to stops.



## PUBLIC FEEDBACK

Participants in the public engagement session offered suggestions for improvements to BPTC service that would improve the customer experience and boost ridership. These include:

**Increase Frequency**  
([Tactic 4.3.4](#))

**Service outside City to job and education sites**  
([Strategy 1.1](#) & [Strategy 4.7](#))

**Extended or adjusted hours to accommodate those with late/early work shifts**  
([Strategy 4.3](#))

**Improved pedestrian access to bus stops**  
([Strategy 4.5](#))

**Improved system for trip planning and bus tracking**  
([Strategy 4.6](#))





# Strategic Framework



The Transform BT strategic plan is built upon the core values and mission and vision statements articulated by the agency's Board of Directors. We used those principles to develop the agency's goals and objectives. These elements provide the foundation for the framework of actions presented in **Initiatives, Strategies, and Tactics**.



# Core Values

Core values are the guiding principles driving BPTC. They reflect what the organization stands for and the type of culture it instills in its everyday work. The strategic plan presents an updated set of core values developed in collaboration with the agency's Board and reviewed by staff and the general manager.



## RESPONSIBILITY TO THE PUBLIC

- We are good stewards of public finances and resources.
- We operate with transparency and openness.
- We act with the understanding that our actions shape our city and our region.
- We proactively solicit and respond to input from our partners and customers.



## DEDICATION TO OUR CUSTOMERS

- We make every effort to ensure that our service is as useful as possible to as many people as possible and maintains a high standard of customer service and support.
- We acknowledge our decisions and efforts impact and are essential to the lives of many people.
- We recognize our services must be adaptable to the changing needs of the community.



## PRIORITIZATION OF OUR EMPLOYEES

- We work to create a culture of pride in our mission and positivity in our interactions.
- We strive to be a place where employees can grow professionally.
- We take proactive steps to ensure transparency and open communication between leadership and all employees.



## STEWARDSHIP OF OUR ENVIRONMENT

- We recognize our responsibility in our community's commitment to mitigating climate change.
- We take steps to reduce the impacts that our operations have on the local and global environment.
- We implement a dynamic plan with specific priorities that target the advancement of sustainability at BPTC.



## SAFETY

- We embrace a culture of safety and a commitment to the BPTC Agency Safety Plan.
- We take no shortcuts when it comes to the safety of employees.
- We take the utmost care to ensure the safety of our riders on our vehicles and at our facilities.

# Mission and Vision

BPTC's mission statement is an articulation of its core purpose, and its vision statement is an expression of its aspirations for the future.



## MISSION

Provide our community with safe, reliable, equitable, and innovative mobility options.



## VISION

Build a community with transportation options to suit the public's mobility needs.



# Goals and Objectives

To realize our mission and vision, we set five overarching goals. Each goal is comprised of two or three objectives. Progress toward each objective can be measured by the key performance indicators presented in the [Performance Monitoring](#) section.



## GOAL 1: SERVING CUSTOMERS

*Attract and retain customers by providing safe, reliable, high-value, and convenient transportation services.*

### Objectives

- A. Make service more dependable, convenient, and useful.
- B. Expand service area and work with partners to make our service more effective.
- C. Improve the customer experience.



## GOAL 2: INNOVATION

*Continually innovate to promote mobility management solutions for the public.*

### Objectives

- A. Proactively pursue technologies to enhance the customer experience.
- B. Adopt innovative practices that make BPTC more efficient and effective.



### GOAL 3: FINANCE AND MANAGEMENT

*Operate in a responsible manner that maintains the organization's long-term financial strength and creates effective governance.*

#### Objectives

- A. Use public resources responsibly.
- B. Maintain the long-term financial health of BPTC.
- C. Ensure long-term operational and organizational effectiveness.



### GOAL 4: EMPLOYEES

*Be an employer of choice by providing a career-based work environment based on a culture of respect, professional and personal growth, and integrity.*

#### Objectives

- A. Invest in employees' well-being and advancement to retain employees
- B. Improve employees' day-to-day work experience
- C. Streamline and advance hiring, onboarding, and training processes



### GOAL 5: COMMUNITY AND EQUITY

*Contribute to the economic, social, and environmental vitality of the community by equitably providing service to all members of the community.*

#### Objectives

- A. Align service and fees with the needs of people who rely on transit.
- B. Support the region's economic development.
- C. Reduce pollution resulting from BPTC operations.



*These goal icons will appear below strategies which support each goal.*



# Initiatives, Strategies, and Tactics



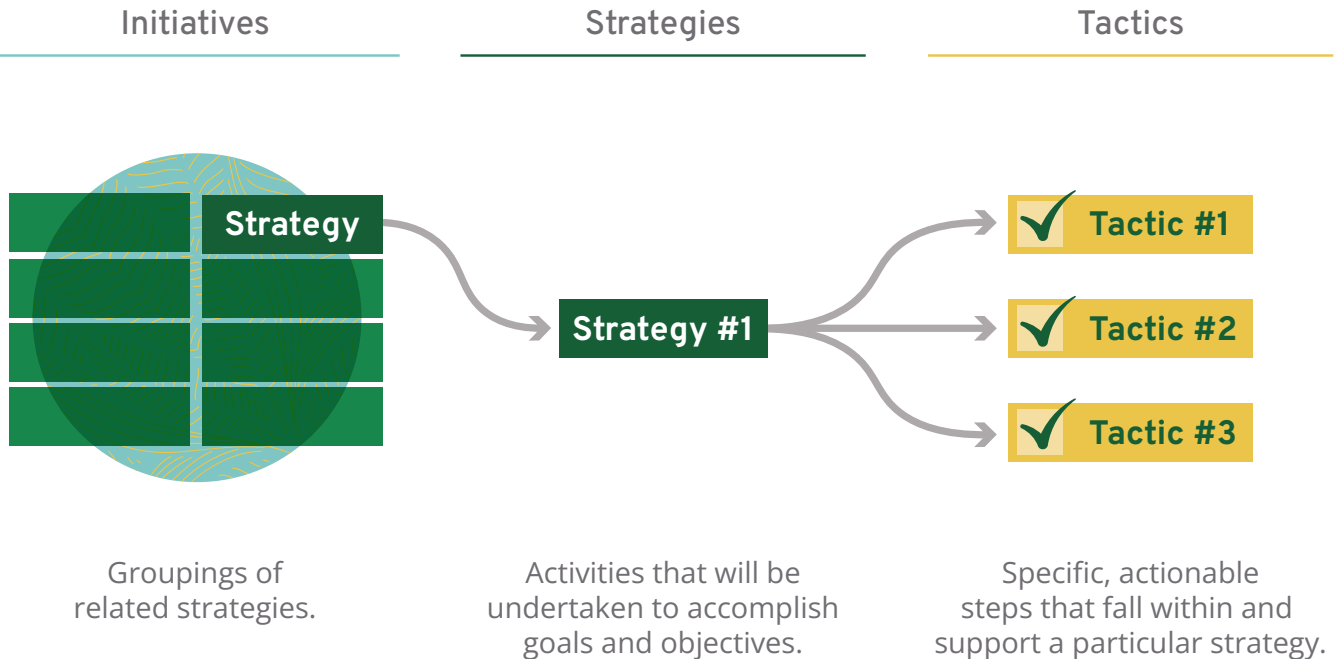


Our goals and objectives provide a blueprint for fulfilling our vision and mission. Achieving those goals and objectives will involve implementing a comprehensive plan of action that affects nearly all aspects of our operations and management. Some of the actions presented in this plan are already in progress; some have been proposed and discussed but are yet to be implemented; others are brand new.

The plan's actions are organized in a three-part framework: **Initiatives, Strategies, and Tactics**.



## Strategic Framework



**Tactics** are the plan's most detailed level of actions, referring to specific tasks, programs, or policies.

Tactics are grouped under **Strategies**. In some instances, strategies contain tactics that are related but distinct. For example, strategy 2.3, "Deploy new technology for system monitoring," contains three tactics for monitoring different aspects of system performance (Tactics 2.3.1, 2.3.2, and 2.3.2). Other strategies refer to single tasks whose complexity requires multiple tactics. For instance, strategy 4.7, "Study and implement East-West Rapid Transit Corridor" contains four tactics, each related to the planning and implementation of the proposed route.

Strategies are grouped thematically under **Initiatives**.

Note that initiatives, strategies, and tactics are not presented in order of importance; nor is this the order in which they will be undertaken. The plan and timing for implementing strategies is presented in the following section.

This plan includes four initiatives, which are supported by a total of 28 strategies.

**INITIATIVE 1:**

**Partnerships and Engagement** – We will build and strengthen our relationships with external partners, ensuring we are an engine for mobility, economic development, and equity in the Bloomington community.

1

**INITIATIVE 2:**

**Modernize Operations** – We will strive to be a national leader among small transit providers in innovation and efficiency. New technology and operating practices will make us more responsive to the needs of our customers.

2

**INITIATIVE 3:**

**Employee Recruiting, Retention, and Satisfaction** – Our employees are our organization. We will continue to invest in recruitment, staff training, and well-being.

3

**INITIATIVE 4:**

**Customer-Facing Service Improvements** – We will continue to optimize and improve our services, from making our bus services more convenient and responsive to customer needs, to expanding alternative service models like microtransit.

4

## INITIATIVE 1:

# Partnerships and Engagement

# 1

The strategies under this initiative relate to our relationships with partners including the City and County government and agencies, Indiana University, the Bloomington-Monroe County Metropolitan Planning Organization, and other entities whose activities are related to mobility.

### STRATEGY 1.1

## Remove barriers to allow BPTC to provide service throughout Monroe County

GOALS



While the City of Bloomington has grown and developed, our operations remain limited to within the City's boundary. The impact of this constraint is clear: customers, stakeholders, and various studies have repeatedly emphasized the importance providing access to educational institutions (e.g., Ivy Tech); job centers (e.g., Park 48); and shopping centers outside the City limits.

Expanding BPTC's service area would:

- ▶ Provide customers with access to these key destinations (Ivy Tech, Park 48) today.
- ▶ Service other key destinations where growth may occur in the future.
- ▶ Support increased operational integration with Rural Transit (which would be accompanied by a funding partnership per Tactic 1.1.3).
- ▶ Allow BPTC to develop an East-West Rapid Transit Corridor that meets the needs of our community ([Strategy 4.7](#)).

### TACTIC 1

#### Review steps necessary for service expansion and dedicated funding implications

BPTC will work with partners to identify options for the legislative changes necessary to operate outside the City. Staff will identify any necessary changes to governance, cost allocation, and program operations. BPTC can implement service outside the City boundary in phases. Limited expansion can occur without a comprehensive cost-sharing agreement between the City and Monroe County.

### TACTIC 2

#### Develop political and community support for expansion

We will support the legislative process by mobilizing our network of supportive partners. We will work with them to identify actions we can take to further this strategy.

### TACTIC 3

#### Develop partnerships to negotiate and implement cost-sharing framework for expanded service

BPTC will explore opportunities for funding with partners like Monroe County, employers, and educational institutions whose residents, employees, and customers would benefit from service expansion. A stronger external partnership program would provide external stakeholders an opportunity to shape BPTC service and support the expansion of transit service for their constituents.



## STRATEGY 1.2

### Establish BPTC as the community's mobility manager

GOALS



Mobility management is when a single entity oversees and coordinates various transportation services. As the region's largest transit agency and designated recipient of federal funds, BPTC is best positioned to assume the role of mobility manager in the greater Bloomington area. Under this strategy, BPTC would provide planning, marketing, and customer service support to a range of modes and services including those we do not directly operate.

#### TACTIC 1

##### Establish forum for coordination with mobility partners

BPTC will convene a regular meeting of partners involved in transportation service provision. We can serve as a facilitator between the various entities in the Bloomington region that operate and oversee transportation services.

#### TACTIC 2

##### Consolidate Transportation Demand Management (TDM) Programs under BPTC

TDM programs are responsible for promoting, incentivizing, and making it easier for the public to use transportation alternatives like transit, bicycling, walking, and ridesharing – basically any mode of travel other than driving alone in a vehicle. Although Bloomington recently established a TDM program, such activities would be more coordinated if they were operated from within BPTC. BPTC has extensive transportation operational experience that would support efforts like establishing a vanpool program or expanding marketing of modes like transit. This may require the creation of new staff positions.

#### TACTIC 3

##### Explore consolidating micromobility program management in Bloomington under BPTC

Although BPTC is unlikely to become the operator of micromobility services, we will work with partners to pursue a seamless integration between, bus, bike, and scooter. Micromobility in Bloomington is operated by private firms. Today, the City and IU are independently responsible for regulating the services. A single program manager can improve coordination and oversight and provide a path forward for integrating these services with BPTC trip planning and payment platforms.

#### TACTIC 4

##### Increase operational coordination with Rural Transit

BPTC will work with Rural Transit to identify opportunities to improve efficiency and service. This could include sharing maintenance and facility operations and costs and exploring merging or extending service.



## STRATEGY 1.3

### Expand opportunities for collaboration and integration with Campus Bus

GOALS



BPTC and IU Campus Bus are two separate systems operating from a shared facility. While the arrangement has benefited both agencies, the operation of two parallel systems results in unnecessary costs and reduces the seamlessness of the passenger experience. These actions will advance the goal of closer agency integration and partnership.

#### TACTIC 1

##### Identify and implement steps to increase integration with Campus Bus

In the short term, BPTC will seek to continue to deepen coordination between the two transit operators to demonstrate the benefits of eventual full integration. Possible areas of cooperation include supporting technology management, managing maintenance of IU buses, or partnering on the transition to battery electric buses.

#### TACTIC 2

##### Establish a formal governance framework for full integration

BPTC will engage Campus Bus in formal discussions regarding unification. This could include the possibility of BPTC operating Campus Bus routes through a contract with the University. We feel there is an opportunity for both parties to benefit from the efficiencies this would create.

#### TACTIC 3

##### Engage Campus Bus in the facility planning process

BPTC has outgrown the maintenance facility that it shares with Campus Bus. We will either need to relocate or expand our operating facility to meet the needs of our current system and planned transition to battery electric buses ([Strategy 2.8](#)). If integration between Campus Bus and BPTC proceeds incrementally, the two operators will engage in discussions regarding the expansion or relocation of their shared facility. If BPTC and Campus Bus do not proceed with integration in any form, BPTC will engage with Campus Bus regarding the departure from the shared facility.

## STRATEGY 1.4

### Create processes to improve community engagement

GOAL



An improved community engagement program will allow BPTC to better respond to the changing transportation needs of our customers and partners. We have identified a range of tactics to increase the frequency and quality of public input and feedback.

#### TACTIC 1

##### Establish a public participation plan

BPTC's public participation plan (PPP) will detail our planned engagement efforts and how those will be incorporated into other planning efforts. A PPP will identify roles and standard procedures for engagement and establish a list of stakeholders and community groups to be contacted during engagement efforts. A focus of the PPP will be to identify hard-to-engage groups in the region and strategies to effectively communicate with these groups.

#### TACTIC 2

##### Establish a survey panel group

BPTC will recruit a panel of riders who can be contacted periodically for customer survey efforts. A consistent survey panel will allow us to track rider attitudes over time and even understand why former riders stopped using the system. BPTC will need to continually recruit for the panel after it is established to account for rider attrition due to factors like customers moving out of the Bloomington area.

#### TACTIC 3

##### Create a rider advisory committee with representatives from key constituency groups

BPTC will create a rider advisory committee. To do this, we will consult with key stakeholder groups (including tenant organizations, providers of social services, and student groups) to identify individuals to join the committee through an application process. We will also establish a regular process for meetings and communications between the committee and BPTC leadership.

#### TACTIC 4

##### Create an operator advisory committee

We will establish a standing committee of operators, formed in coordination with BPTC's union, to engage on a variety of topics that impact operator quality of life. The committee's purpose will be to provide input to improve the satisfaction of both employees and customers and maintain open lines of communication on these issues.

#### TACTIC 5

##### Develop new systems for tracking customer satisfaction

BPTC will acquire new processes, and potentially new tools, to allow us to track customer satisfaction through regular customer surveys and comment submissions. We will log and categorize customer complaints and track satisfaction levels over time. Customer service staff will track complaint resolutions. The customer satisfaction tracking will enable evaluation based on the metrics in the performance monitoring section of this report, including satisfaction with technology.





## STRATEGY 1.5

### Play a more active role in community and economic development

GOALS



Land use and transportation infrastructure and services are closely linked, with transit service playing an important role in helping shape Bloomington. In response to feedback from our stakeholders, BPTC will engage with a broad set of partners to address transit-related issues.

#### TACTIC 1

##### Host semi-annual roundtables with broad set of partners

Engagement during this strategic plan identified the value of having regular roundtables with partners to discuss development and land use, community and economic development, human and social services, and transportation issues. In this tactic, we will organize and host regular meetings between the Bloomington Chamber of Commerce, major employers, and municipal agencies involved in development. We plan to work closely with our trusted partners at the Bloomington-Monroe County Metropolitan Planning Organization, given their key role in convening stakeholders on transportation-related issues. The goal of these meetings is to discuss how transportation can support economic development and land use objectives and vice versa.

#### TACTIC 2

##### Establish regular touchpoints with key stakeholders to coordinate transit and development

BPTC and the governments of the City of Bloomington and Monroe County will engage in regular conversation on local land-use issues. These exchanges will help determine how transit can effectively serve proposed developments and provide an opportunity for us to advocate to better incorporate transit considerations into the development review and land use planning processes.

## INITIATIVE 2:

# Modernizing Operations

# 2

Many of BPTC's systems and procedures have not yet been updated to reflect modern technology or best practices. The strategies in this section will help improve agency operations, management, and planning to make BPTC a nimbler organization that can adopt the latest industry innovations.

### STRATEGY 2.1

#### Modernize or replace the operating and maintenance facility to address future needs

GOALS



Expanding BPTC's current operating and maintenance facility, or relocation to a new one, is crucial to meeting the agency's goals related to providing improved service, retaining and attracting employees, and moving the agency to the forefront of mobility practices.

The existing facility is outdated, lacks room for expansion, and cannot accommodate electric vehicle chargers for BPTC's entire fleet.

### TACTIC 1

#### Determine the preferred solution for facility modernization or replacement

The first step for BPTC's facility modernization is to determine whether it should expand the current site onto adjacent properties or construct a new operating and maintenance facility at a new location. This analysis will require a cost-benefit analysis to understand which approach allows BPTC to meet our projected needs for the lowest cost. In addition, BPTC and Campus Bus will need to resolve the question of operational integration ([Strategy 1.3](#)) before making final decisions about their shared facility.

### TACTIC 2

#### Conduct environmental review, design, and engineering

A new or expanded operating facility will have to undergo environmental review, design, and engineering. This work will allow us to develop more specific cost estimates and position the project to pursue competitive funding opportunities.

### TACTIC 3

#### Identify funding sources

A major facility project will need to draw on a diverse range of funds, including local, state, and federal grants. Acquiring the necessary funding will take time and likely closely track with the design and engineering phase of the project. We will explore the feasibility of joint development with partners like IU to support construction of the facility. The IJA (federal infrastructure bill) significantly expanded federal discretionary funding opportunities, but many of the grant programs administered by the federal government are highly competitive. Most successful applicants must demonstrate strong local or state funding support to receive funds.

### TACTIC 4

#### Facility construction

The final step toward implementing a new facility is construction. Typically agencies cannot break ground until the full funding need is met. BPTC could explore a phased strategy if needed, in which the facility expansion or replacement occurs in several stages.

## STRATEGY 2.2

### Expand organizational capacity for acquiring and implementing new technologies

GOALS



Public transit is increasingly a technology-driven industry. To successfully adopt new technologies to improve operations, planning, and the customer experience, we will also need to invest in our ability to identify, implement, and maintain the best services and technologies.

#### TACTIC 1

##### Establish Technology Steering Committee

A Technology Steering Committee of existing staff will oversee the selection of a vendor for new technology in early 2023 (Tactic 2.2.3) and develop a proposal for the creation of new technology staff roles (Tactic 2.2.3). The Technology Steering Committee will also coordinate with the BPTC Board's technology working group on the agency's strategic direction regarding technology.

#### TACTIC 2

##### Create dedicated technology staff role(s)

New staff will be needed to execute a variety of BPTC's technology goals, including taking over administration of IT systems from the City of Bloomington, adopting new software, and overseeing implementation, training, support, and maintenance for new systems. BPTC will identify what responsibilities should fall under the purview of new staff and recruit for and resource any necessary positions.

#### TACTIC 3

##### Select vendor for IT system design, procurement, and implementation

In late 2022, BPTC issued an RFP for several new systems, including Computer-Aided Dispatch/Automatic Vehicle Location (CAD/AVL), a microtransit operating platform and hardware, new fare collection equipment, and new software for planning, run cutting, and rostering. The Technology Steering Committee (Tactic 2.2.1) – with the support of others in our leadership, as appropriate – will assess proposals and work with the selected vendor to help select and implement the chosen systems.



## STRATEGY 2.3

### Add new staff positions

GOALS



The approved 2023 budget included funding for five new staff positions:

- ▶ Road Supervisor
- ▶ Manager of Marketing and Development
- ▶ Grant Procurement Specialist (LIT-funded position)
- ▶ Building and Grounds Technician
- ▶ Chief Safety and Training Officer

The Chief Safety and Training Officer is particularly critical for the implementation of this plan, as that role will be responsible for creating a system to assist operator applicants in obtaining their CDLs ([Tactic 3.3.1](#)); implementing safety and maintenance-related systems ([Strategy 3.4](#)); and oversight of the expansion of the agency's professional development offerings ([Strategy 3.5](#)). BPTC will prioritize defining these new roles, updating the organizational structure as needed, and finding and hiring qualified candidates.

#### TACTIC 1

##### Define roles and responsibilities of new staff positions

Before recruitment and hiring can start, BPTC will identify specific roles, their respective responsibilities, and a timeframe for hiring.

#### TACTIC 2

##### Hire for new staff positions

BPTC will move forward with hiring for new roles once the positions' scopes and responsibilities are defined.



## STRATEGY 2.4

### Deploy new technology for system monitoring

GOAL



Many of the BPTC's goals and objectives, including providing more accurate information to customers and using data to plan service, will require the adoption of new technologies. ([Strategy 2.2](#) for detail on staff responsibilities.) Under this strategy, BPTC will acquire and implement systems to help monitor operations.

#### TACTIC 1

##### Certify and validate APC system

BPTC vehicles are fitted with Automatic Passenger Counting (APC) equipment. We are actively working to optimize and validate the system so we can provide reliable information to support service planning and performance monitoring.

#### TACTIC 2

##### Acquire a CAD/AVL system

The technology RFP that we issued in late 2022 includes acquiring a computer-aided dispatch/automatic vehicle location (CAD/AVL) equipment for the agency's fixed-route vehicles. CAD/AVL systems allow for the real-time tracking of vehicle location. This information can be used by dispatch to monitor operations and pushed to customers through real-time arrival information.

#### TACTIC 3

##### Fully utilize RTA system capabilities

BPTC's RTA system, which tracks vehicle maintenance needs, will be fully implemented so we can efficiently monitor and track repairs, track preventative maintenance needs, and readily access information about the agency's fleet.

## STRATEGY 2.5

### Adopt new software to improve employee management

GOALS



BPTC can better utilize technology to manage employees, automate processes, and improve internal communication. Upgrading from paper to computerized and cloud-based systems for managing employees will improve data validity, streamline administrative processes, and expedite hiring.

#### TACTIC 1

##### Implement new HR software/software capabilities

A fully functional HR platform will allow our agency to track applicants more accurately through the hiring and onboarding process, provide our employees with more access to payroll and benefits information, track professional development among employees, and provide up-to-date workforce information such as absenteeism and position openings.

#### TACTIC 2

##### Integrate finance systems

BPTC will implement a system that can monitor revenue, payroll, and other expenditures and facilitate budgeting and planning efforts.

#### TACTIC 3

##### Set up and utilize employee information hub

As part of our efforts to improve intra-agency communication and increase transparency, BPTC will develop a system of file sharing and messaging to ensure all employees have access to resources and notifications.

## STRATEGY 2.6

### Utilize technology to plan service more effectively

GOALS



BPTC's technology assessment recommended we adopt software to assist with service planning and route scheduling to help identify efficiencies and improve agency decision-making. BPTC will work with a vendor with expertise in transit technology to assist with the selection and purchase of this software ([Tactic 2.2.1](#))

#### TACTIC 1

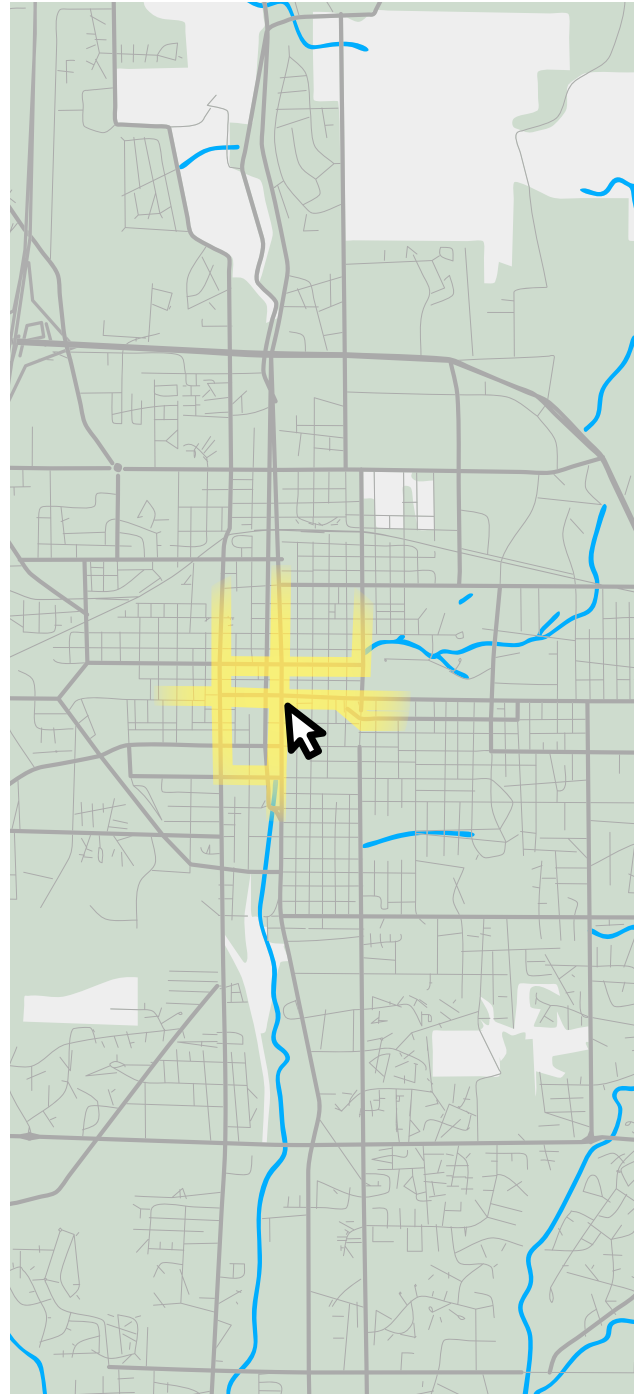
##### Adopt and utilize service planning software

Several different service planning solutions can help streamline the process for planning and evaluating new services. We will review these options and procure the software that best meets our needs.

#### TACTIC 2

##### Implement new route planning, run cutting, and rostering software

BPTC relies on manual tools like spreadsheets to develop and update our transit schedules. There are several route scheduling software systems on the market that can automate parts of the scheduling process and help us create more efficient schedules that better meet the needs of customers and operators.





## STRATEGY 2.7

### Establish and implement a routine cycle for performance monitoring and service planning efforts

GOAL



At BPTC, we routinely conduct plans and studies to improve our services. This strategy seeks to further formalize the planning process by establishing a routine schedule for important planning activities such as service planning, organizational planning, and rider surveys.

#### TACTIC 1

##### Develop schedule for conducting planning initiatives

BPTC will create a schedule to coordinate all service assessments and planning efforts. This schedule will drive the timing of the other tactics in this strategy.

#### TACTIC 2

##### Establish process for tracking key performance indicators (KPIs)

Assessing the agency's performance, including our progress relative to this strategic plan, will rely on the creation of and tracking of KPIs and metrics.

#### TACTIC 3

##### Conduct routine service planning based on pre-defined schedule

BPTC routinely conducts evaluations of transit service, but unlike many other agencies, no fixed schedule exists for such studies at BPTC. Under this tactic, BPTC will determine an ideal interval for major and minor service planning updates and ensure staff members are resourced to complete those efforts on the prescribed schedule. Having a fixed schedule will help inform the timing of other planning efforts.

#### TACTIC 4

##### Regularly update strategic plan and actively track progress

So that it remains a relevant, useful guiding framework for BPTC's decisions and actions, this strategic plan should be treated as a dynamic document. Progress toward this strategic plan can be assessed by comparing the completion of tactics against the Implementation Schedule, and updates to the plan may be required as conditions change. We will also identify and implement a schedule for updating this plan.

#### TACTIC 5

##### Conduct a routine passenger origin-destination survey

BPTC will conduct routine passenger origin-destination surveys. These surveys, which intercept passengers aboard buses, provide valuable information on rider behavior, demographics, and satisfaction. This data will directly inform future service changes.

## STRATEGY 2.8

### Transition to Battery-Electric Buses (BEBs)

GOAL



Having received funding for the purchase of four initial BEBs, we have already begun the process of replacing our diesel-powered fleet. As our existing site is not large enough to support a full fleet of BEBs, completion of this strategy will depend upon expanding or replacing the agency's facility ([Strategy 2.1](#)). BPTC will pursue the goal of achieving a 100% BEB fleet by 2050.

#### TACTIC 1

##### Purchase buses

The core component of BPTC's zero-emission transition is battery electric buses. BPTC will continue procuring BEB buses throughout the life of this plan. This transition will be gradual, driven by funding and the retirement cycle of BPTC's existing fleet and existing facility constraints.

#### TACTIC 2

##### Complete facility upgrades

To operate BEBs, we will need adequate charging infrastructure. Our operating facility will need adequate charging capacity, along with the electrical infrastructure that supports fast charging. The need to charge vehicles overnight may also impact how vehicles are parked and serviced, further necessitating changes at BPTC's garage. These upgrades will be incorporated into the broader facility modernization process ([Strategy 2.1](#)).

#### TACTIC 3

##### Conduct training for mechanics and drivers

The transition to electric vehicles will require staff training. For mechanics, the drivetrain and maintenance needs of electric buses are different from conventional diesel buses. For drivers, training may be needed to optimize vehicle range and ensure safe vehicle operations ([Strategy 3.5](#)).

#### TACTIC 4

##### Plan for entire lifecycle to ensure BEB fleet remains in a state of good repair

As the transition to BEBs is still in its infancy, transit agencies in the U.S. have little experience planning for end-of-life replacement of electric buses. Today's vehicle lifecycle assumptions are based on decades of industry experience with diesel buses. BEBs may have very different lifecycles. BPTC will need to plan for vehicle and battery replacement. Existing assumptions around vehicle useful life and major maintenance milestones need to be revisited based on operational experience with BEBs.





## STRATEGY 2.9

### Develop a plan to implement sustainability improvements in agency operations

GOAL



Environmental stewardship is one of our core values. As such, we consider the full impact of our operations, from air pollution generated by diesel buses to the environmental impact of waste disposal. This strategy explores how BPTC can improve its environmental sustainability.

#### TACTIC 1

##### Sustainability plan (from procurement to disposal)

Many transit agencies are conducting sustainability plans to identify how they can reduce their environmental footprint from procurement to disposal. Common elements of such plans include greenhouse gas inventories and reduction strategies, strategies to improve energy efficiency, waste disposal and reuse strategies, and stormwater management and mitigation strategies. BPTC will develop such a plan to identify specific steps we can take to become more environmentally sustainable and support the city's Climate Action Plan.

#### TACTIC 2

##### Enter purchasing agreement for or investment in on-site renewable energy

The City of Bloomington Climate Action Plan aims to achieve carbon neutrality by 2050. BPTC's transition to BEBs will reduce our emissions. Our carbon footprint will be lowered further if our buses are charged using carbon-free sources of electricity. Informed by the sustainability plan, we will explore increasing our share of electricity that comes from renewable energy through purchasing agreements and/or the implementation of onsite electricity generation through solar or wind.

#### TACTIC 3

##### Improve facility sustainability

Facilities are a major source of emissions for any transit agency. As part of the planned operating facility overhaul or relocation, we will identify ways to create a high-efficiency building. The facility investment can further environmental goals beyond emissions by incorporating the latest stormwater management and waste disposal features.



## INITIATIVE 3:

# Employee Recruiting, Retention, and Satisfaction

# 3

Employees are the backbone of our agency. Attracting and retaining employees, particularly operators and maintenance technicians, is necessary for improving the reliability of service, expanding service to new destinations, and implementing innovative mobility practices. The transit industry nationwide — like many other industries — faces a severe staffing shortage. At BPTC, we can combat that shortage by investing in our current employees to increase retention and by expanding recruitment activities.

### STRATEGY 3.1

#### Expand capacity for hiring and recruiting

GOALS



Increased turnover among bus operators means that we need to attract many applicants each year to maintain service levels. The following tactics will help increase the flow of applicants. (Strategies to address the administrative load of hiring new employees are included under [Strategy 2.5.](#))

### TACTIC 1

#### Develop and implement enhanced program to assist applicants in obtaining Commercial Driver's Licenses (CDLs)

Like many agencies across the country, BPTC has found that the CDL process is a barrier to otherwise qualified applicants becoming bus operators. BPTC will improve the current process for assisting applicants in obtaining their CDL permits and licenses to help get more applicants through the hiring process and into providing service.

### TACTIC 2

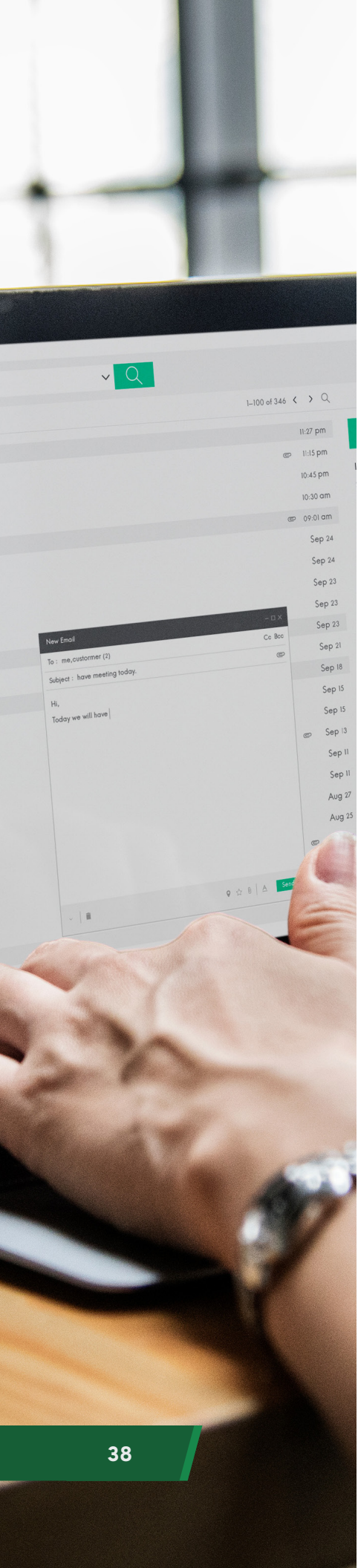
#### Develop hiring pipelines with new partners

High schools, technical colleges, and job agencies can act as pipelines for new operators at BPTC. BPTC will cultivate relationships with organizations that are interested in connecting their constituents with jobs in transit.

### TACTIC 3

#### Lobby to reduce minimum age requirements for CDL

Working with our partners in the Indiana Transportation Association, BPTC will advocate for lowering the minimum age for obtaining a CDL as part of efforts to increase the pool of bus operators.



## STRATEGY 3.2

### Improve intra-agency communication

GOALS



Both BPTC administrative staff and vehicle operators noted that improved communication technology and procedures would help improve operations and employee morale. Many of our staff spend the day in the field, reducing opportunities for interaction and communication.

#### TACTIC 1

##### New systems for communicating with staff

BPTC will upgrade its systems for communicating with staff, including acquiring a full-function SMS system, providing email accounts and access to all employees, and creating an information hub that employees can access ([Tactic 2.5.3](#)).

#### TACTIC 2

##### Increase organizational transparency through improved communications

During the development of this plan, BPTC staff expressed a desire for increased transparency in agency decision-making. BPTC will solicit input from staff about concrete actions that can be taken to increase transparency and explore strategies for improved communication such as a periodic internal newsletter and distributing our annual performance report to employees.

#### TACTIC 3

##### Implement standard operating procedures for dispatch and operations

In conjunction with acquiring new systems for communication and system monitoring, BPTC will develop standard operating procedures (SOPs) for dispatch and operations. These SOPs will ensure greater consistency in how we handle and communicate service disruption events and ensure no break in communication occurs between dispatch and operators during dispatcher shift changes.

## STRATEGY 3.3

### Enhance worker wellness and morale

GOALS



We will invest in the wellness and satisfaction of our workforce to help increase staff well-being, satisfaction, and retention.

#### TACTIC 1

##### Implement an employee recognition program to reward high performance

We will build upon our commitment to acknowledging the accomplishments of our employees. In addition to the annual Employee Appreciation and Recognition Banquet, which recognizes operators who have maintained a perfect safety record for a year, BPTC will explore new opportunities for commemorating performance for various types of achievements, potentially including completing professional development, receiving high ratings from customers, completing years of service to the agency, and attendance.

#### TACTIC 2

##### Launch an employee wellness program

We will invest in the health of our employees by developing an employee wellness program with special attention to the types of health conditions that can accompany transit work, including injuries related to driving for long periods, as well as diet and exercise. As part of this tactic, we will solicit feedback from employees to understand how to target this effort.

#### TACTIC 3

##### Administer an annual employee survey

Routinely soliciting input from employees will help us remain responsive to the concerns of our workforce and provide insight into the agency's progress at meeting our goals related to employee satisfaction and retention. The survey should solicit feedback on topics addressed in the performance monitoring section of this report, including agency innovation and efficiency, and overall employee satisfaction.

#### TACTIC 4

##### Develop and implement process for employee exit interviews

BPTC will develop a process for soliciting honest feedback from departing employees through standardized exit interviews, which will help us identify and address the factors leading employees to leave the agency, particularly if we see common reasons for departures across several employees. Once established, exit interviews will be a part of the routine offboarding process.



## STRATEGY 3.4

### Create a process for assessing and improving employee safety

GOAL



During the engagement for this plan, staff said that BPTC should develop a process to respond to violations of our Customer Code of Conduct. These tactics represent a comprehensive response to ensuring the safety of our customers and employees, with an emphasis on helping prevent conflict and altercations, as well as connecting riders in crisis with support and resources.

#### TACTIC 1

##### Establish a safety committee

A standing committee of agency leadership and employees will discuss safety incidents, assess the progress of programs and policies, and make recommendations about ways to further improve the safety of employees and customers alike. BPTC will form the committee and set a regular schedule for meetings, coordinating with other BPTC planning initiatives as appropriate.

#### TACTIC 2

##### Train operators in conflict de-escalation

With the proper training, operators can help prevent minor conflicts from developing into incidents that disrupt service or threaten the safety of operators or customers. Operators can also be trained to connect customers in crisis with social service agencies or community organizations.

#### TACTIC 3

##### Develop protocols for involving road supervisors when customer incidents arise

The new road supervisor position ([Strategy 2.3](#)) will be available when operators require support in addressing on-board incidents. BPTC will develop protocols around when road supervisor assistance should be requested and how operators can work with the road supervisor to resolve situations.

#### TACTIC 4

##### Track compliance with Customer Code of Conduct

In some situations, neither operators nor road supervisors may be able to de-escalate or resolve on-board incidents and it may be necessary to temporarily suspend riders from BPTC services. While BPTC operators will not be responsible for identifying individuals who have been suspended, a customer with a suspension who violates the Code of Conduct will face additional legal consequences. To ensure compliance with the Code, we will refine our process for tracking Code infractions, using SafeTracker or a similar system.

#### TACTIC 5

##### Lobby for changes to state law regarding penalties for assaulting transit employees

BPTC's Customer Code of Conduct can be augmented by legal action. The Indiana Transportation Association, which represents BPTC and other transit agencies in the state, will work in the upcoming session of the Indiana State Legislature to lobby for increased penalties for assaulting transit employees.

## STRATEGY 3.5

### Implement an expanded professional development program

GOAL



BPTC staff expressed a desire for increased investment in their professional development, including opportunities for advancement, increasing training offerings, and expanded performance evaluation. These tactics will help build employee confidence and communicate that we offer opportunities for employees throughout their careers.

#### TACTIC 1

##### Establish formal career path guidance

Employees are more likely to remain with the agency for longer if they have a clear sense of the opportunities for growth and promotion. BPTC leadership will create guidance on career paths available to agency employees and clarify the process for promotion and qualifying for new positions.

#### TACTIC 2

##### Provide more trainings for agency employees

Leadership will identify a staff role (or roles) to oversee the agency's expanded professional development program including conflict de-escalation ([Tactic 3.4.2](#)), use of new technologies and systems, and the use and maintenance of BEBs ([Tactic 2.8.3](#)). The training lead(s) will create and implement a comprehensive training program, scheduling sessions, identifying trainers, and tracking completion among staff.

#### TACTIC 3

##### Formalize performance evaluation processes

BPTC will build upon the existing process for evaluating employee performance, developing clear metrics for assessing performance in each role, and providing employees with the opportunity for self-assessment and to discuss the results of their evaluations.

## STRATEGY 3.6

### Review employee compensation

GOALS



BPTC will work to create a transparent and competitive compensation structure to help attract and retain employees.

#### TACTIC 1

##### Conduct a salary survey

Especially in today's competitive labor market, we compete for applicants with many other employers. BPTC will survey our employees to understand how the compensation package compares and is perceived relative to other employers in the Bloomington area.

#### TACTIC 2

##### Evaluate compensation for non-driver staff

While driver compensation has received substantial attention in recent years due to the shortage of bus operators, the agency has not recently reviewed compensation for our non-driver staff, including maintenance, administrative, and supervisory roles. Incorporating results from the salary survey (Tactic 3.6.1) as well as market research, we will develop updated pay grades for our non-driver employees to ensure BPTC is staffed to provide excellent service and implement this plan.

## STRATEGY 3.7

### Reevaluate operator schedules to increase staff satisfaction and retention

GOAL



BPTC will look for opportunities to improve the work-life balance of our employees through adjustments to schedules, the scheduling process, and other changes to policies and procedures.

#### TACTIC 1

##### Create Schedule Improvement Task Force to identify and implement schedule adjustments

A group of employees will meet regularly to discuss operator scheduling issues. The Task Force will be charged with identifying how BPTC can maintain service levels while providing schedules that work better for their lives, from increasing consecutive days off to reducing split schedules.

#### TACTIC 2

##### Explore opportunities to provide employees with better work-life balance

Beyond worker schedules, we will develop proposals for changes to work policies that increase worker satisfaction while contributing to (or not reducing) the agency's ability to provide service, including incentive pay for certain routes, times, or days of the week, policies related to extraboard and overtime, and time off.



## INITIATIVE 4:

# Customer-Facing Service Improvements

# 4

Initiative 4 contains strategies for improving the services used directly by customers by adopting new technology, improving agency procedures, and implementing new routes and services. This initiative includes actions related to fare payment, bus stops, trip planning, and BPTC's bus routes and other mobility services.

### STRATEGY 4.1

#### Develop and adopt a fare and revenue plan

GOALS



BPTC will coordinate the development of a new fare policy with the adoption of new fare collection technology, for which the BPTC Board has already allocated funds. The new system will likely allow customers to pay with their smartphones and purchase fares online, and the agency will implement fare capping to assure that passengers will never overpay because they didn't purchase a pass. These changes to fare collection policy and technology will make it easier to use BT and support ridership growth.

### TACTIC 1

#### Conduct a fare study

A fare study will explore the impact on customers and agency revenue of proposed fare changes, including changes in fare payment systems, helping to ensure that any changes are equitable, appropriate, and compatible with BPTC's revenue needs.

### TACTIC 2

#### Implement and adopt recommendations of the fare study

The fare study will include recommendations for changes to fare policy and the acquisition of new fare technology and equipment. Implementing those recommendations will involve developing public-facing materials, making relevant changes to fare collection technology, ensuring functionality of online payment systems, and installing new fare collection equipment.

### TACTIC 3

#### Implement expanded fare subsidy program

Bloomington's local income tax includes funding for a fare subsidy program to provide free and half-price fares to qualifying individuals. BPTC will work with non-profit agencies to expand the existing fare subsidy program to reduce barriers to mobility for low-income customers and seniors.



## STRATEGY 4.2

### Establish permanent microtransit service

GOALS



Microtransit is technology-enabled demand response transportation that uses ride-hailing technology to match drivers and customers. Microtransit can be a complement to fixed-route transit, particularly in locations and times when it does not make sense to run a fixed route. Microtransit trips are dynamically scheduled via mobile application, and trips are provided by vehicles that can vary in size, from passenger cars to minibuses. In 2023, BPTC will use additional funding from the local income tax (LIT) to expand our microtransit pilot into a permanent program and create an in-house on-demand service. Microtransit offers our agency a new way to serve customers while also appealing to new customers.

#### TACTIC 1

##### Develop service standards and KPIs for microtransit

BPTC will develop metrics to assess cost performance, service quality, and rider satisfaction. These standards will go beyond the microtransit-related metrics identified in this plan's Performance Monitoring section and allow us to evaluate and compare performance of various parts of the microtransit program.

#### TACTIC 2

##### Establish permanent contracted microtransit service

BPTC will expand upon the microtransit pilot program, which allows customers to book rides with private drivers connected with transportation network companies (TNCs) like Uber and Lyft. BPTC will evaluate the pilot program based on the first six months of operation and develop a model for permanent service.

#### TACTIC 3

##### Launch in-house microtransit/same-day paratransit service

BPTC will launch an in-house microtransit service to complement the microtransit service provided by TNCs. We will purchase new microtransit vehicles, install CAD/AVL equipment, and train operators and dispatchers. The same technology and processes that enable microtransit will also allow us to enhance the paratransit service by offering same-day ride requests, greatly improving the transportation options of customers with disabilities while reducing trip costs by more efficiently scheduling shared rides.

## STRATEGY 4.3

### Develop new service standards and expand service

GOALS



Service standards are important to guide decisions around how to allocate limited resources and when to increase or decrease service levels. BPTC will formalize standards for the productivity and provision of fixed-route service to ensure that the service we provide is as useful to our customers as possible. We will also use LIT funding to roll out increased service spans (i.e., operating hours) and bus frequencies.

#### TACTIC 1

##### Develop service standards related to service levels (by route type), and financial and operational productivity

Using existing service as a benchmark, BPTC will develop standards for assessing existing routes and trips for ridership and productivity. These standards may consider the need to provide a baseline level of service to areas where ridership is low, but some customers may have limited transportation options. The development of fixed-route service standards should be performed in conjunction with the process of evaluating BPTC's microtransit program ([Strategy 4.2](#)), as microtransit and fixed-routes services should complement one another.

#### TACTIC 2

##### Develop service change protocol

The service standards created in the previous tactic will be developed into a service change protocol that our planners will use to determine when to change frequencies, spans, or routes. The protocol will also lay out a timeline for assessing and revising service and should be coordinated with the broader schedule of planning initiatives developed as part of [Strategy 2.7](#). These policies and procedures will allow us more agility to update service based on changing conditions.

#### TACTIC 3

##### Increase Sunday service

LIT funding includes a provision to increase Sunday service from 8:40 a.m. to 5:40 p.m., which includes 56 hours of fixed-route and a microtransit component ([Strategy 4.2](#)).

#### TACTIC 4

##### Increased bus frequencies to a minimum of 30 minutes during peak periods

One aspect of the agency's new service standards (Tactic 4.3.1) will be establishing a minimum of 30-minute headways during peak times. This increase in service is another provision of LIT funding.





## STRATEGY 4.4

### Develop guidelines for providing contracted fixed-route service

GOALS



BPTC has entered into agreements with residential developers to provide bus service to new apartment complexes. These agreements provide a model for how BPTC can contract with external partners to fund new or expanded service. We will develop guidelines for entering into new contracted service agreements to streamline the creation of such agreements and ensure that those arrangements are beneficial to us as well as our stakeholders.

#### TACTIC 1

##### Determine cost allocation agreement terms for contracted service

We will determine what percentage of fully allocated costs contracting parties should be responsible for. A standardized cost allocation model will improve transparency and fairness, as well as predictability and consistency, in negotiating contracted services. Developing this model will also inform discussions around expanding service outside of the City of Bloomington ([Tactic 1.1.3](#))

#### TACTIC 2

##### Work with City and/or other agencies to integrate contracted service into development approval process

As part of our increased engagement on mobility-related issues ([Strategy 1.5](#)) we will work to engage relevant partners to incorporate contracted service into Bloomington's development review process.

#### TACTIC 3

##### Develop a marketing strategy for contracted service

To increase awareness of BPTC's contracted service offerings, we will develop electronic and print materials. We will also develop and implement a strategy for circulating those materials among residential developers and other potential contracted service partners.

## STRATEGY 4.5

### Improve bus stops and first/last mile connections

GOALS



Participants at the strategic plan public engagement meeting emphasized the need for better amenities at and access to Bloomington Transit bus stops.

#### TACTIC 1

##### Develop a bus stop amenities plan

BPTC will inventory existing bus stop amenities and develop a plan for stops that need new lighting, shelters, benches, or informational signage, as well as stops where existing amenities need repair. We will also identify and implement a process for prioritizing bus stop improvements.

#### TACTIC 2

##### Partner with relevant agencies and landowners to improve pedestrian access to BT stops

Much of the infrastructure around BPTC stops (like sidewalks, curb cuts, and in some cases street furniture) is the responsibility of private landowners or other government agencies. BPTC will work with relevant parties to ensure that bus stops are accessible and safe. Bus stop access can be a subject of discussions with community partners ([Tactic 1.5.1](#)).

#### TACTIC 3

##### Implement the bus stop amenity plan

Completing the installation and repair of bus stop amenities will be a multi-year effort conducted in conjunction with our partners.

#### TACTIC 4

##### Maintain bus stop amenities

BPTC will maintain an updated inventory of bus stop amenities and conduct repairs as needed. We will incorporate stop maintenance needs into the BPTC annual operating and capital budgets.



## STRATEGY 4.6

### Adopt new customer-facing information system

GOALS



Customers look to BPTC to help plan their travel. Improved customer-facing information systems will go a long way to improving the customer experience through tools like trip planning and accurate real-time arrival and service information.

#### TACTIC 1

##### Improve dissemination of information about service changes and delays with improved technology

This tactic was identified as a key priority at engagement meetings for this plan. BPTC will upgrade our real-time information tools to provide customers with accurate information about bus arrival times and timely notifications about route changes and disruptions.

#### TACTIC 2

##### Support and/or create a multimodal trip-planning service

Improved trip planning, enabled by real-time vehicle information ([Tactic 2.4.2](#)), can help improve the passenger experience and make BPTC's services more useful. In addition, better trip planning functionality can improve integration between different modes of transportation available in Bloomington (including those provided by BPTC like bus, microtransit, and paratransit, and those provided by other operators, like bike and scooter rentals). BPTC will identify the availability of trip planning tools that enable people to compare various options for travel based on time, availability, and cost and make them available on the BT website. If necessary, BPTC may contract with a developer to create this tool so it is available to customers.



## STRATEGY 4.7

### Study and implement East-West Rapid Transit Corridor

GOALS



The \$3.8 million of local income tax funding allocated to BPTC in May 2022 included \$1.6 million for the creation of a new East-West Rapid Transit Corridor. Such a route could feature elements of Bus Rapid Transit (BRT), including designated right-of-way along portions of the route and off-board fare payment. While the initial planning of the new route can begin immediately, it is important that BPTC have authorization to operate beyond the Bloomington City limits before proceeding with costly design and environmental review processes ([Strategy 1.1](#)).

#### TACTIC 1

##### Issue Feasibility RFP for BRT

BPTC will issue an RFP in early 2023 to begin exploring the potential costs and ridership of a new East-West transit corridor. The resulting study will help us determine what destinations to serve and provide initial cost estimates. The study's findings will be used to support efforts to authorize service outside the City ([Tactic 1.1.2](#)).

#### TACTIC 2

##### Design and environmental review for BRT

Before the East-West corridor can be implemented, we will complete design and engineering, as well as any necessary environmental reviews. As part of this step, BPTC will complete the necessary alternatives evaluation for the corridor, conduct public engagement, and initiate any necessary land procurement.

#### TACTIC 3

##### Final design and implementation of BRT

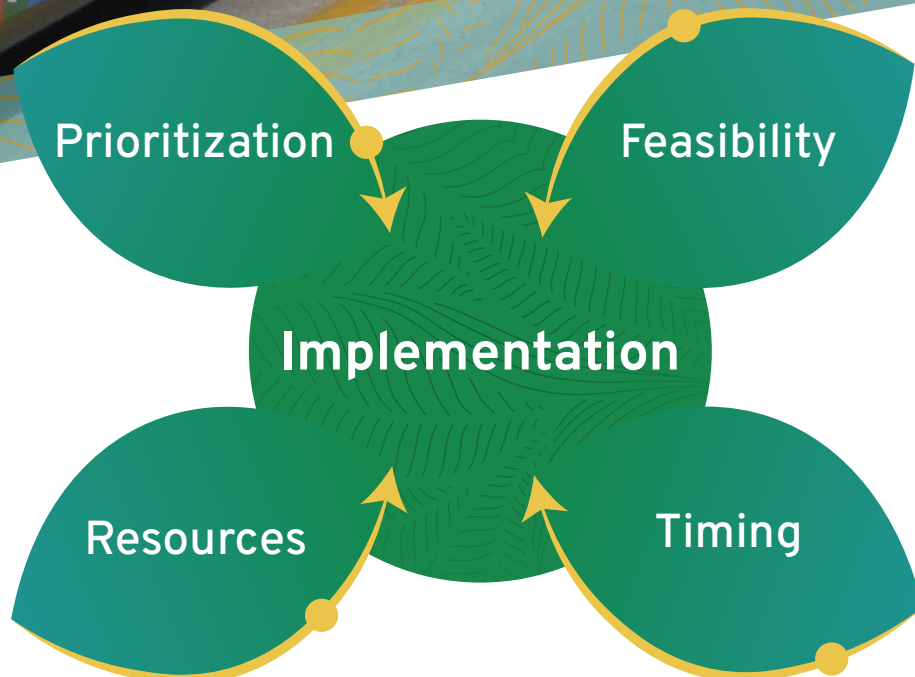
In addition to the construction of stations and protected guideways, BPTC will develop a service launch plan to ensure that the East-West Rapid Transit Corridor operates effectively from day one. BPTC will train operators on the new route and new procedures associated with any bus priority elements of the route. The agency will also create a name and brand for the new service, develop marketing materials, and update the agency's trip planning and bus tracking services.





# Implementation Plan





Considerations of Implementation Timeline

## Considerations

The strategies in the previous section constitute a plan for improving and modernizing nearly every aspect of BPTC over the next ten years. These actions can't all be undertaken at once. The plan's implementation timeline, presented below, reflects four key considerations: prioritization, availability of resources, feasibility, and timing.



## Prioritization

Prioritization refers to the relative importance of each strategy. BPTC evaluated each strategy to consider its level of priority based on four criteria:



- 1. Relevance to the plan's objectives:** The more objectives supported by a given strategy, the higher the priority level assigned to a strategy.
- 2. Urgency and risk:** If a strategy's delay would impose substantial risks or costs on the agency, that increased its level of priority.
- 3. Dependencies and contingencies:** Strategies whose completion is required before other actions can be undertaken also received additional consideration for a higher level of priority.
- 4. Support from the public, employees, and partners.** So that the views and opinions of BPTC's stakeholders were incorporated into the implementation plan, our process also recognized and gave additional priority to strategies that were mentioned in the engagement conducted to develop this plan.

The prioritization, among other factors, ultimately influenced the order in which strategies and tactics have been timed for implementation.

## Resources

Strategies vary considerably in the amount of funding and staff time that would be required for their implementation. Those strategies that can be accomplished quickly and cheaply were good candidates for incorporation early in the implementation schedule. All else being equal, strategies eligible for specific existing funds, such as Bloomington's local income tax (LIT), were generally planned for implementation before strategies without such immediate funding support.

## Feasibility

Beyond the availability of funding, the ability to implement the proposed strategies may be constrained by political, contractual, economic, or even geographic factors. Those strategies whose implementation is more within the control of the agency tend to be scheduled ahead of those with a high degree of uncertainty.

## Timing

In addition to considerations about urgency and contingency of strategies, which are incorporated in the prioritization, timing was a consideration in the development of the implementation timeline.

Some tactics are directly contingent upon the completion of other tactics. Some of the most pressing of these tactical sequences include:

- ▶ Gaining authorization to operate outside City limits.
- ▶ Determining the level of integration with Campus Bus ahead of facility expansion or relocation.
- ▶ Timing of key funding sources such as Lo-No grants and LIT funding.
- ▶ Completion of contingent tasks such as completing design and environmental review before moving forward with construction.

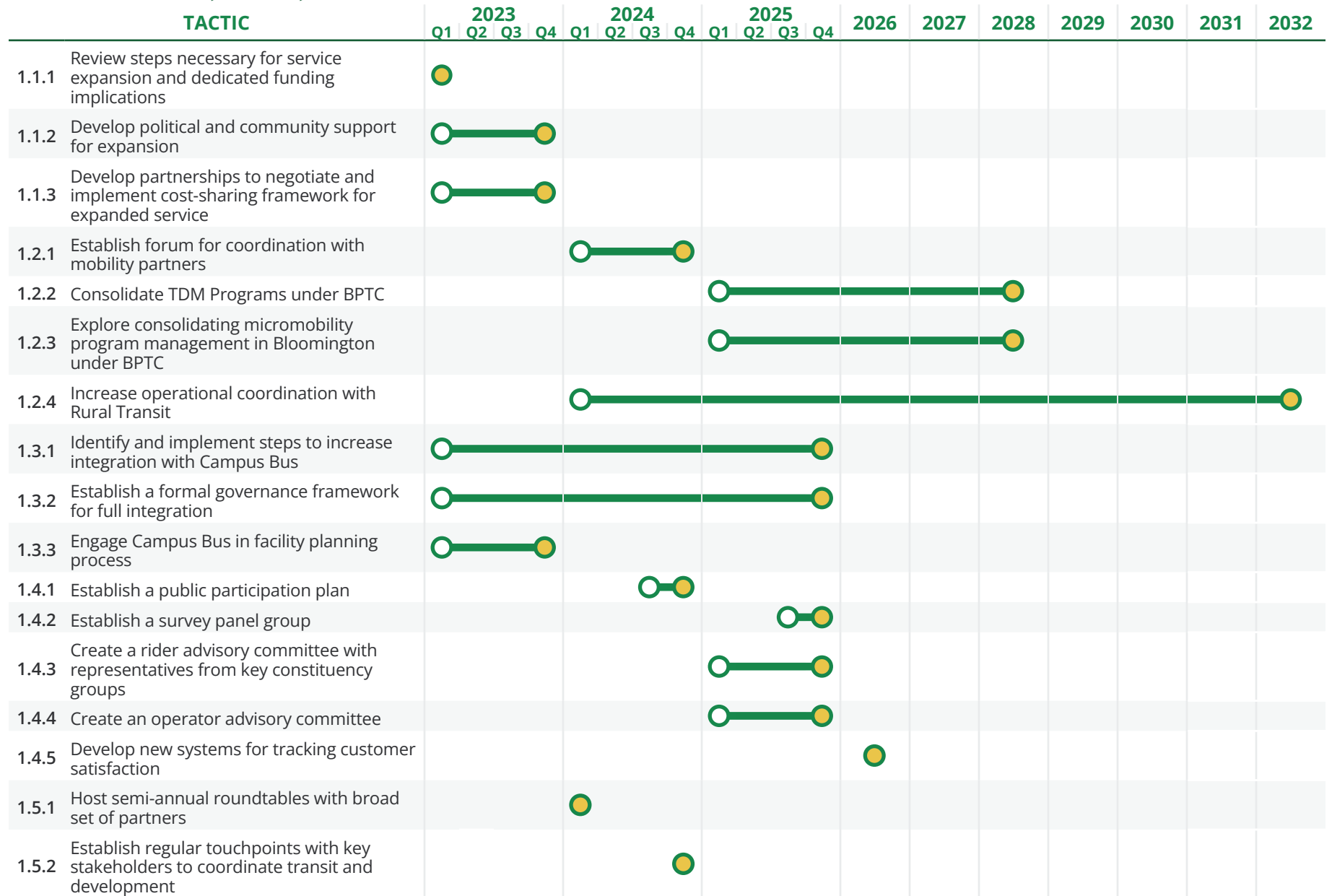


## Implementation Schedule

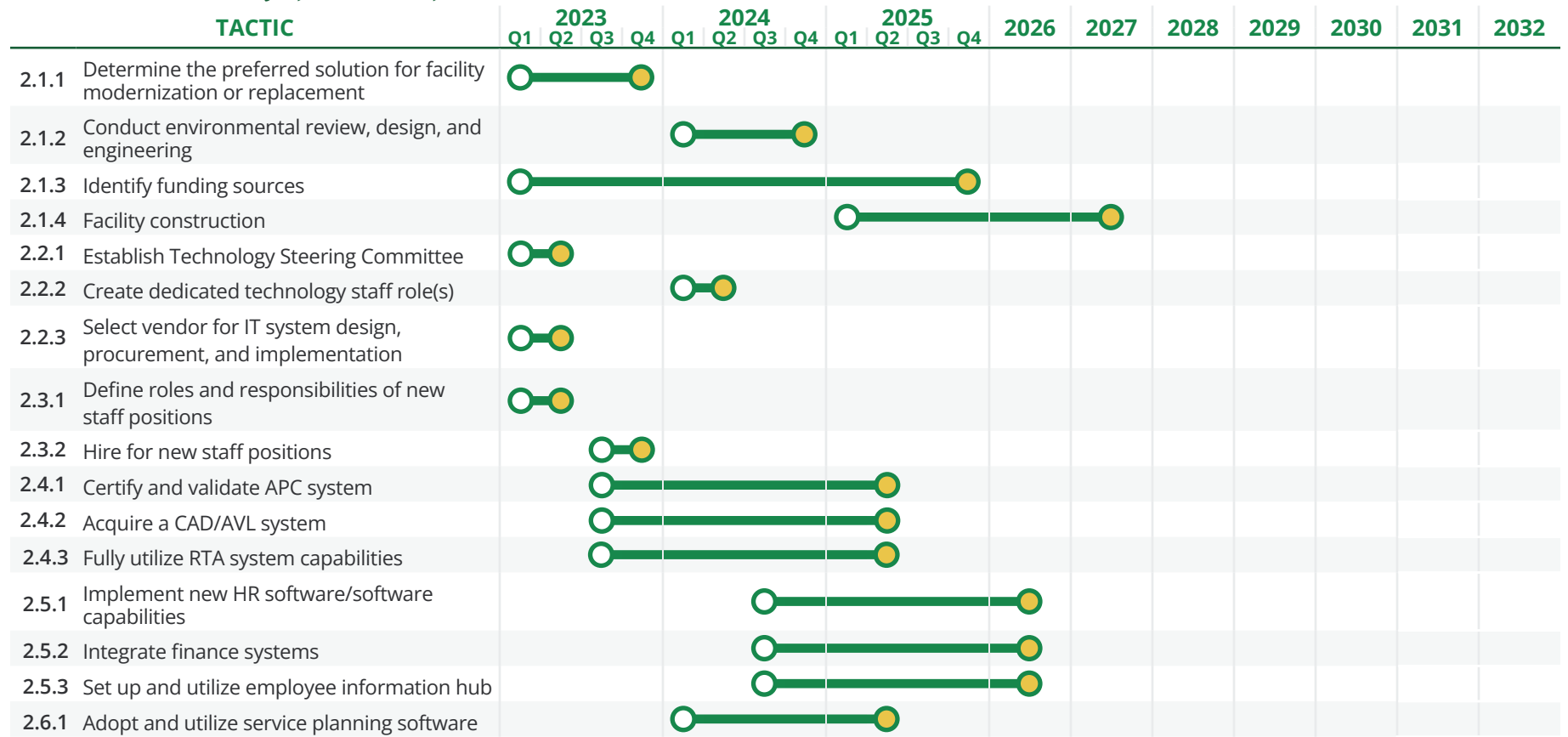
BPTC has developed implementation timelines for each initiative. These timelines reflect the considerations described above: prioritization, resources, feasibility, and timing.

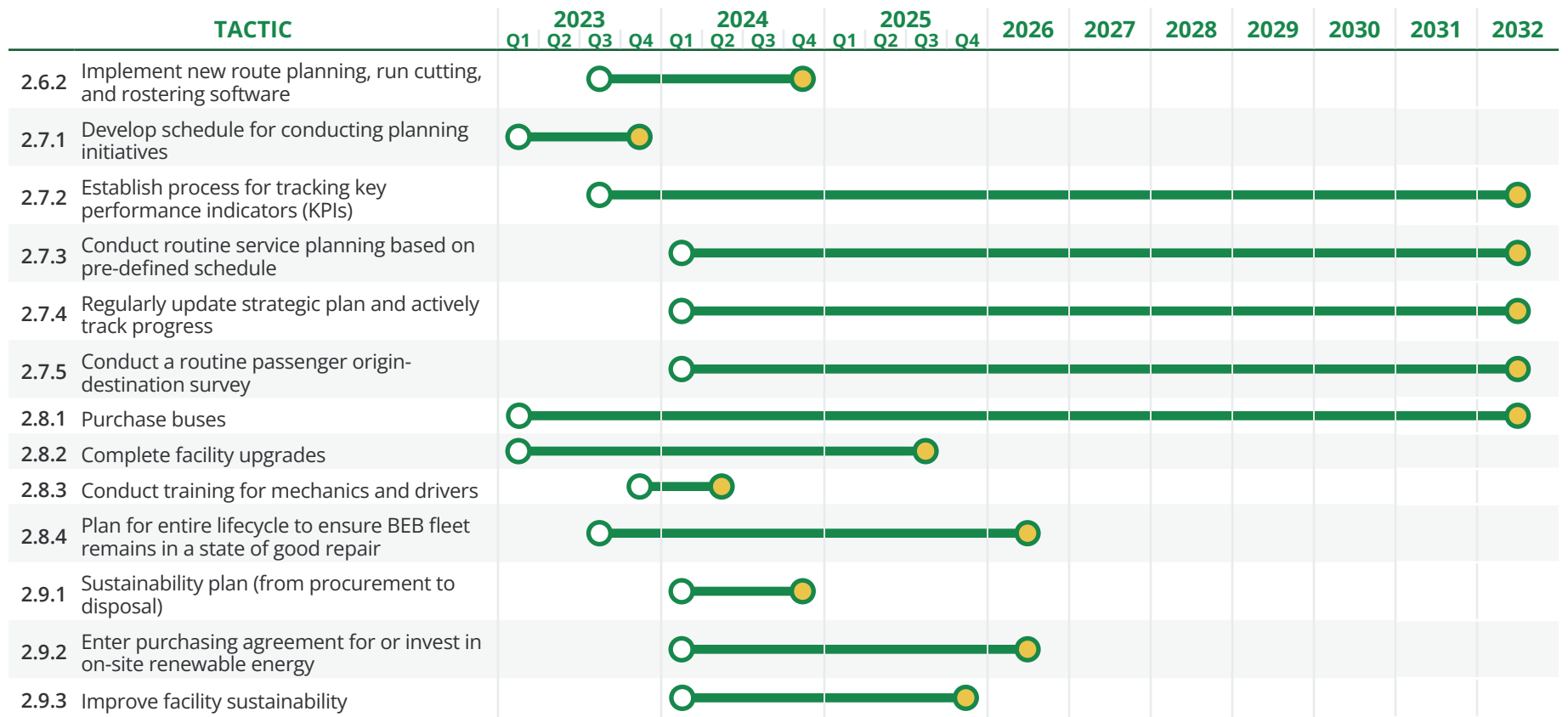


### Initiative 1: Partnerships and Implementation Timeline



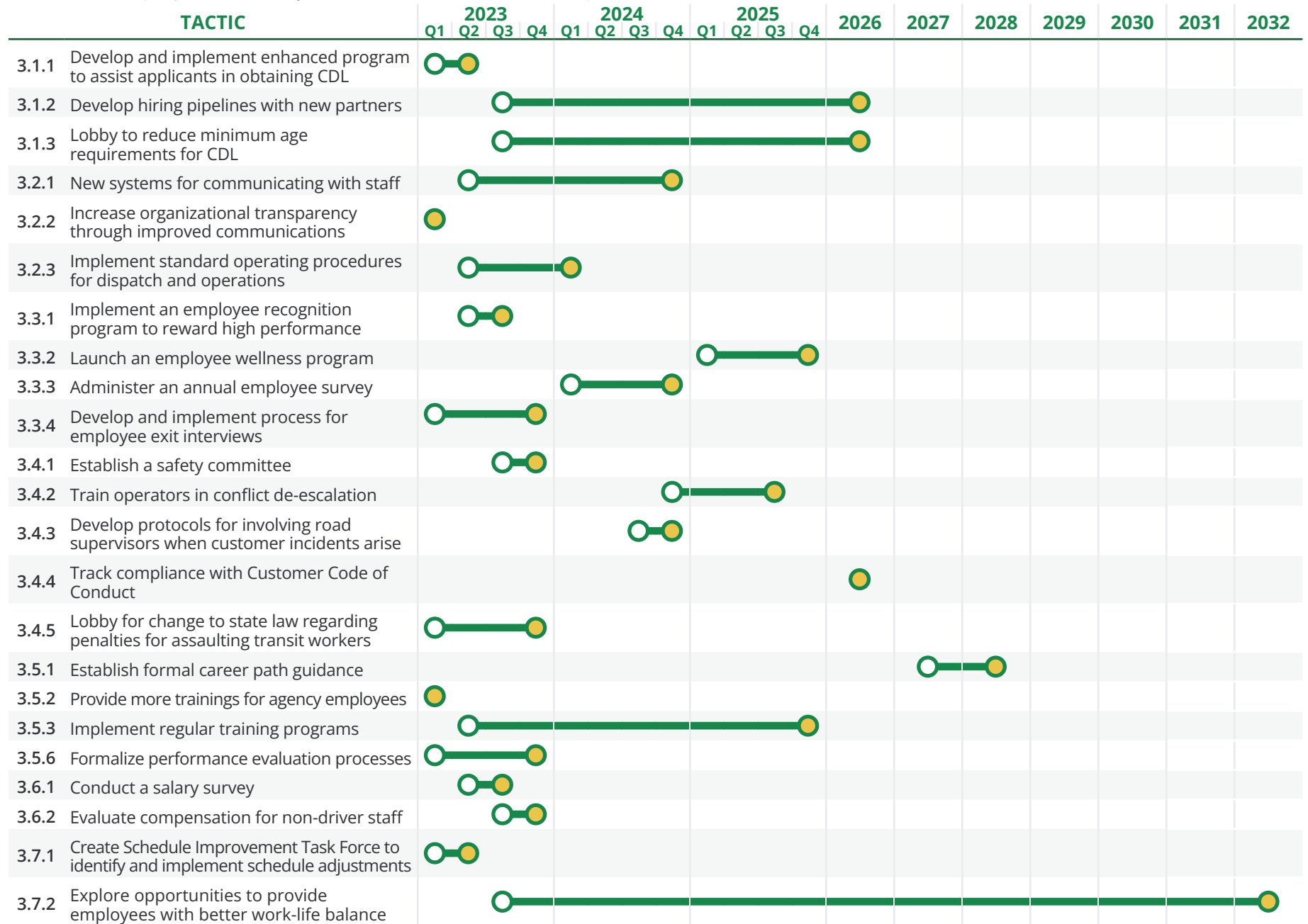
## Initiative 2: Modernizing Operations Implementation Timeline



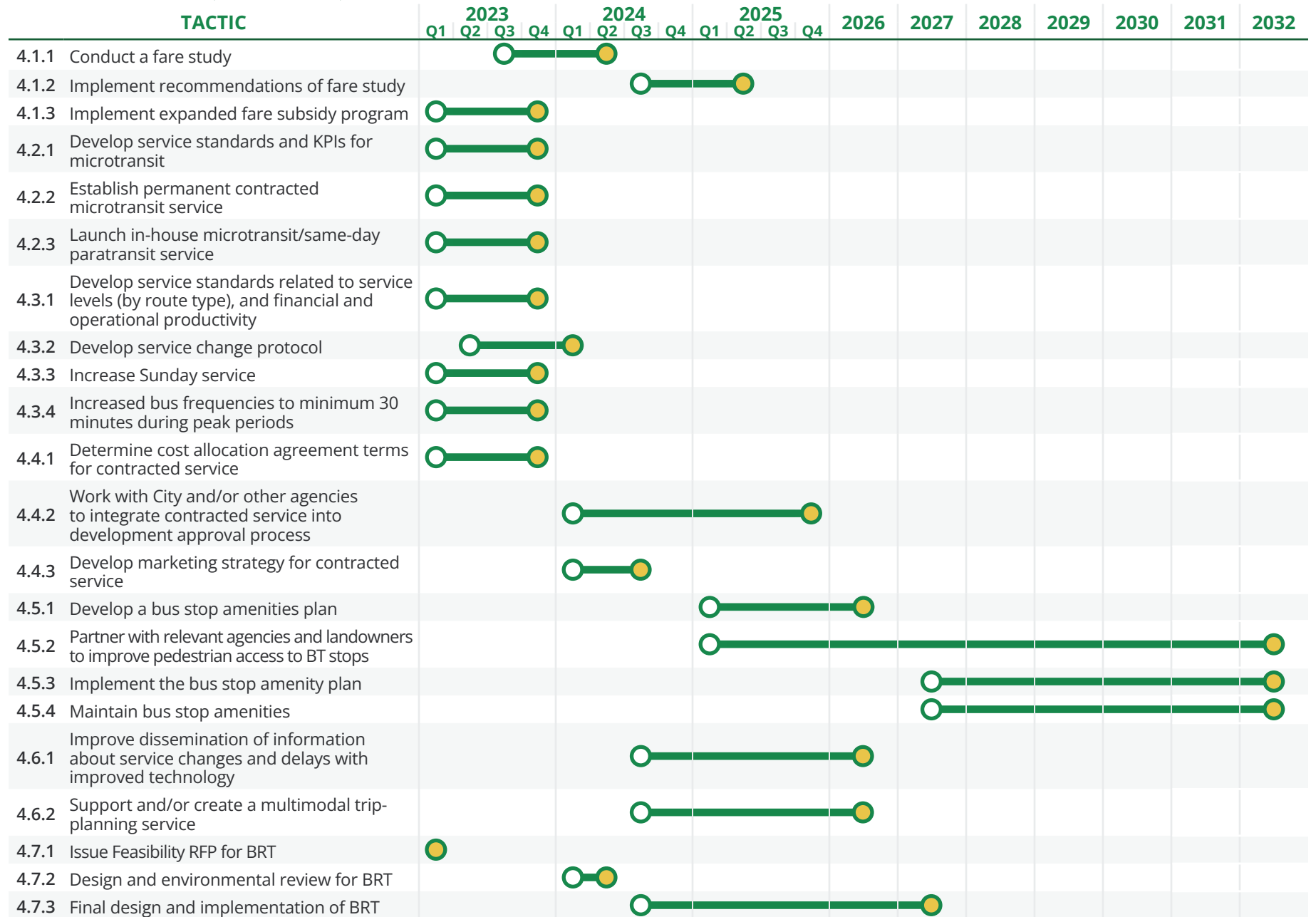




### Initiative 3: Employee Recruiting, Retention, and Satisfaction Implementation Timeline



### Initiative 4: Service Improvement Implementation Timeline



# Performance Monitoring

To demonstrate accountability to the public, we will report annually on our performance ([Tactic 2.7.2](#)). The annual performance report will include progress on implementation and progress toward the objectives, as outlined below.

## Strategic Plan Implementation Tracking

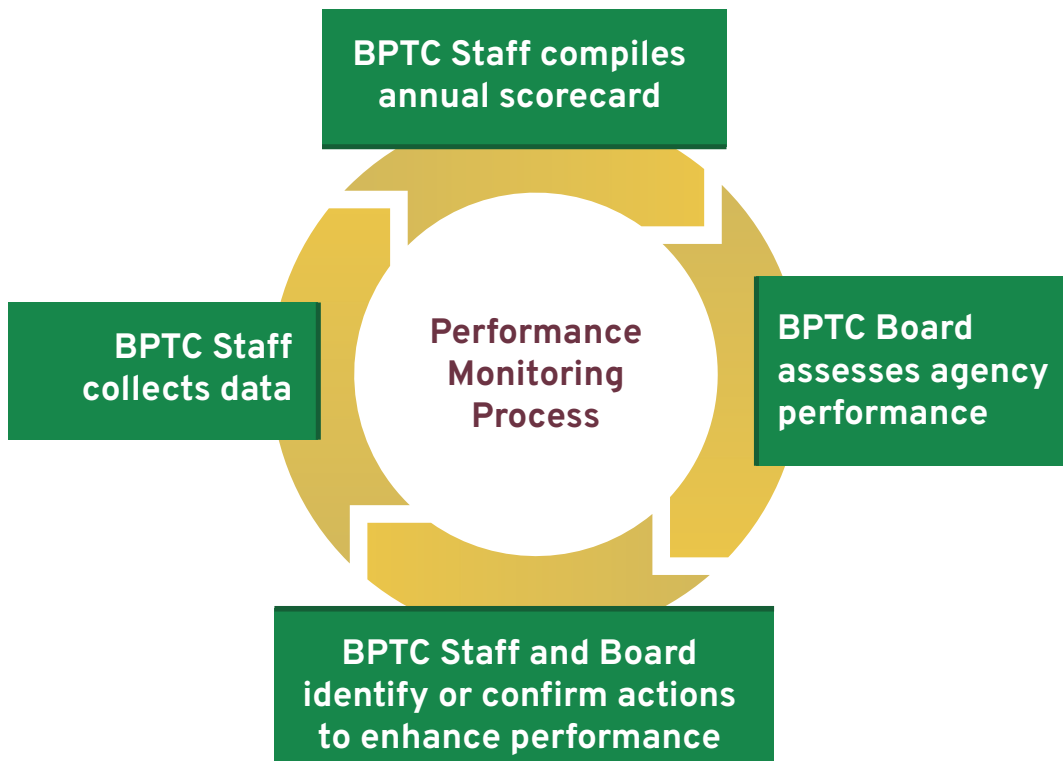
BPTC will track progress toward completing this strategic plan. BPTC will report annually on the strategies and tactics in this plan that we accomplished in the previous year, identify which tactics were delayed and explain why, and provide updated implementation timelines for each initiative. This plan may be revised periodically to account for changes in resources, priorities, or other conditions; these revisions will be included in the agency's annual report.



# Performance Scorecard: Monitoring Progress Toward Our Objectives

BPTC will develop an annual performance scorecard that will assess progress toward our objectives via the Key Performance Indicators (KPIs) identified on the next page. Agency leadership and staff will use the scorecard to set annual targets for performance on each metric and present these goals to the Board for comment and approval at the beginning of each review cycle. At the end of the cycle, we will compile data into the scorecard along with a discussion of the agency's performance in light of the year's events. This report, which will be publicly available, will be presented to the Board for evaluating the success of the agency.

**The Key Performance Indicator Table** presents the KPIs that will be included in the scorecard along with the objectives relevant to each KPI. In some cases, BPTC will develop the capability of tracking some of the metrics on the scorecard as we complete the actions in this strategic plan; tactics relevant to data collection are listed in the rightmost column. In other cases, BPTC already collects the required data, or data is available from other sources such as the U.S. Census.





## Key Performance Indicators

KEY PERFORMANCE INDICATOR	OBJECTIVES	TACTICS RELATED TO DATA COLLECTION
Bus on-time performance	1A	2.4.2
Number of missed bus trips per month	1A	Already available
Paratransit on-time performance (percentage of trips arriving within a certain number of minutes of scheduled pickup time)	1A	4.2.1
Paratransit missed trips	1A	4.2.1
Average microtransit wait time (time elapsed between ride request and pickup)	1A	4.2.1
Ridership (total and by route)	1B	2.4.1
Population within ½ mile of a BPTC route	1B	Already available
Population within ½ mile of a high-frequency BPTC route (service every 30 minutes or more during peak)	1B	Already available
Customer satisfaction rate	1C	1.4.2, 1.4.5
Number of customer complaints	1C	1.4.2, 1.4.5
Customer satisfaction with BPTC technology services	2A	1.4.2, 1.4.5
Major IT system downtime events	2B	2.5.3, 4.6.1, 4.6.2
Result from annual employee survey on questions related to innovation and efficiency	2C, 4B	3.3.3
Cost per passenger trip (total and by route)	3A	2.4.1
Percent adherence to annual budget	3A	Already available
Cost per vehicle revenue hour	3B	Already available
Preventative maintenance completed on time (%)	3B	2.4.3
Passengers per revenue hour and revenue mile (total and by route)	3C	Already available
Mean distance between failures	3C	2.4.3
Employee retention	4A	2.5.1
Total employees and employee hours of professional development per year	4A	2.5.1
Employee satisfaction rate	4B	3.3.3
Percentage of positions unfilled	4C	
Hiring process time	4C	2.5.1
Hiring pipeline attrition	4C	2.5.1
Percentage of high-need census tracts with a BT stop	5A	Already available
Revenue miles, revenue hours, boardings, and alightings outside Bloomington City limits	5B	2.4.1

KEY PERFORMANCE INDICATOR	OBJECTIVES	TACTICS RELATED TO DATA COLLECTION
Ridership, passenger trips per revenue hour, and cost per passenger trip on contracted service routes	5B	2.4.1
Percent and total number of jobs within ½ mile of BPTC stop or within a microtransit service zone	5B	Already available
ZEV share of fleet	5C	Already available
Percent of BPTC's electricity from zero-emissions sources (purchased and produced on-site)	5C	2.4.3





# Conclusion





Transform BT is a plan to turn our agency into a service provider that uses innovative technology and practices to provide high-quality mobility options to our customers. Our community continues to change and grow, so we must adapt as well. To support the region's economic development, BPTC needs to provide access to major employment and educational sites throughout the region. We will explore providing new types of service to respond to changing mobility preferences. We will adopt new technologies that let us communicate more effectively with our customers and operate more efficiently internally as well. We will coordinate with our partners in transportation, planning, and development to provide an integrated mobility experience for our customers and work together to meet the needs of our community. And we will become an employer of choice in our region so we can attract and retain the professional workforce we need to provide high-quality mobility services.

We are excited to embark on this transformation. We hope you will support us in working toward our vision of building a community with transportation options to suit the public's mobility needs.





**STRATEGIC PLAN**  
**TRANSFORM=3T**

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