

REPORT NO. FL-11-0014

# EFFECTIVE POLICY MAKING IN TRANSIT THE ROLE OF THE BOARD

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Final Report

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16. Abstract  This is a report of the process followed in the design, development and testing of a training manual for less experienced transit board members. The report contains details regarding the various phases and activities carried out to determine the curriculum content, format and presentation methodologies for delivery of the program.  The report also reflects the results of the testing of the manual and development program which resulted in program modifications.					
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## I. Introduction

The Urban Mass Transportation Administration (UMTA) and the University of North Florida share a concern that the education and training needs of public transit board members are not being adequately served. Transit board members are the policy bodies of public transit agencies throughout the nation. Yet no publicly available continuous mechanism exists for acquainting and preparing new or existing board members for their important transit roles.

This project was undertaken to partially fill this gap. The project involved design, production and pilot testing of an educational development program for board members of public transit systems. Emphasis of the program is appropriately defined by the project title: "Effective Policy Making in Transit: The Role of the Board."

In large part this project arose from a two-session series of workshops for public transit board members held in 1983 at the University of North Florida in Jacksonville under sponsorship of UMTA. The Transit Board Development Program described in this report is an expansion of those workshop efforts. It is the intent of UMTA and the University of North Florida that this project provide a resource so that transit agencies, government bodies and educational institutions can greatly broaden the education and training opportunities for public transit board members.

The final work product of this project is a publication/ training manual, Transit Board Development Program. This report details and documents the design, production and pilot testing of that publication.

## II. Report of Program Design, Development and Pilot Testing

The Transit Board Development Program was designed, developed and pilot tested in nine phases. These phases are identified, illustrated and calendared in Table 1.

This unit tracks and elaborates upon each of these nine phases. The rationale for each phase is identified and the work effort within each phase summarized.

## A. Program Design

### 1. Phase 1 - Set Goals

A clear goal statement was developed as an initial step:

Design, produce and pilot test an educational development program to meet the needs of board members of public transit systems.

This simple narrative statement served to continually provide a reference point for planning. As consultants were engaged this goal statement—as well as the Table 1 model which evolved—proved valuable as communication aids to insure clarity of purpose, process and timetable.

The term "training" was used in the initial goal statement. As the design process evolved the term "development" was substituted in the belief that it more accurately described the program and the complexity of the roles of transit board members.

### 2. Phase 2 - Establish Assumptions

It was readily apparent early in the process that more precise delineation of the target program was essential. Potential content, audience, methodology and format were vast. A useful product could be developed only if parameters and guidelines were established.

A series of assumptions evolved. These arose from a variety of sources including the initial contract proposal, discussions with UMTA staff, knowledgeable transit board members and staff, knowledge of sound instructional practices, and the range of potential audience-users.

The following assumptions grew from recommendations and initial staff study to direct that the program:

- . Reflect the findings of literature/research, transit expertise and views of Board members
- . Limit instruction to no more than 12-15 hours
- . Build on the principles of adult learning theory
- . Be highly transferable
- . Be usable with readily available resources at reasonable cost
- . Serve a primary target of newer board members
- . Be designed for groups of 20-30



- . Result in a largely self-contained, easily updated instructional manual
- . Be pilot tested to simulate field condition

TABLE 1 - PROCESS FOR DESIGN DEVELOPMENT AND PILOT TESTING OF TRANSIT BOARD  
DEVELOPMENT PROGRAM UMTA/UNIVERSITY OF NORTH FLORIDA  
1984-85

(SEPT) 1 <u>GOAL</u>	(SEPT/OCT) 2 ESTABLISH <u>ASSUMPTIONS</u>	(OCT-JAN) 3 DETERMINE CURRICULUM <u>CONTENT</u>	(DEC-JAN) 4 DESIGN CURRICULUM <u>COMPONENTS</u>	(JAN-FEB) 5 DETERMINE TRAINING METHODOLOGY	6 ASSIGN TO WRITER/ <u>PRESENTER</u>	(MAR-APR) 7 PREPARE TRAINING <u>MANUAL</u>	(MAY) 8 CONDUCT FIELD <u>TEST</u>	(MAY-JULY) 9 PUBLISH TRAINING <u>MANUAL</u>
	Reflect the findings of literature/research, transit expertise and views of Board members							
Design, produce and pilot test an educational development program to meet the needs of board members of public transit systems.	Limit instruction to no more than 12-15 hours Build on the principles of adult learning theory Be highly transferable Be usable with readily available resources at reasonable cost Serve a primary target of newer board members Be designed for groups of 20-30 Result in a largely self-contained, easily updated instructional manual Be pilot tested to simulate field conditions	Review Literature and Research Review Previous Experience Survey Transit Board Members Draw on Curriculum Advisory Committee  Revise	EXAMPLES: Legal Issues Communications Financing Transit Board Staff Relations	EXAMPLES: Lecture _____ Discussion _____ Case Study _____ Simulation _____ Role Play _____ A/V Present- ation _____		draft The Role of The Transit Board	Pilot Workshop May 1985 Jacksonville  Revise	The Role of The Transit Board

### 3. Phase 3 - Determine Curriculum Content

Five steps (a-e, following) were undertaken to insure the development of a curriculum appropriate to the role and needs of the target audience. (Now defined in established assumptions as newer public transit board members.)

#### a. Review Literature and Research

Using computerized search techniques, published research and literature relevant to public transit boards was reviewed and synthesized. Selected materials regarding public and private and non-profit boards were also reviewed and synthesized to identify similarities and differences relevant to transit boards. Appendix A is an annotated summary of those sources found most useful. Many of these and additional sources are identified in the manual as aids to study and future references by transit board members.

#### b. Review Previous Experience

The evaluations of two previous UMTA/UNF sponsored Transit Board Training Programs were reviewed and summarized for guidance in curriculum content and instructional methodology. This summary is included as Appendix B.

#### c. National Survey of Public Transit Board Members

A national survey of public transit board members was designed and conducted. The questionnaire utilized was developed from information drawn from the literature and research review and from topics included in previous workshops or proposed in evaluation of those earlier programs. A consultant experienced in direct mail survey-research edited and designed the final questionnaire.

Appendix C contains the questionnaire, the letters which accompanied it and summaries of responses and findings.

Three questionnaires were mailed to the 302 transit properties listed with UMTA of which it was determined 264 had transit boards. The chairpersons of these boards were asked to:

- (1) Complete and return a questionnaire,
- (2) Ask one of the "most experienced members of his board" to complete and return a question naire, and

- (3) Ask one of the "newest members of his board" to complete and return a questionnaire.

Questionnaires were returned by 142 transit board members, representing 28 percent of the transit boards surveyed.

In the total process of curriculum development, the survey of transit board members provided the clearest and best documented guidance. Details of results are included with Appendix C. The following patterns were apparent from analysis of survey response:

- . A high order of agreement (71-95%) was apparent on eleven topics respondents viewed most important to performance as effective transit board members.
- . Both "transit specific" topics, (i.e., funding; planning; service rates and fares) and "Generic" topics, (i.e., separating policy and management roles, and various communication topics) were included among the topics which respondents reported were most important to performance as effective board members.
- . Of 23 topics listed in the questionnaire 20 were ranked very important or extremely important (the highest intensity rankings) by more than 50% of the respondents (see Table 2, next page).
- . No topic among the 23 was ranked somewhat important or of little importance (the two lowest intensity scale categories) by a majority of respondents.
- . Significant differences were not apparent in the responses of board members with little experience (less than two years) and those with longer experience (two to five years, or more than five years).

TABLE 2 - VERY IMPORTANT AND EXTREMELY IMPORTANT RANKING  
OF TOPICS BY NATIONAL SAMPLE OF TRANSIT BOARD MEMBERS

Funding	95%
Communication among Board/Members	87%
Communication among Board/Staff	84%
Board/Staff Relations	83%
Communication with other local government officials	82%
Policy vs. Management	81%
Planning	81%
Service, rates, fares	75%
Human Relations of Working Together	74%
Communications with General Public	71%
Evaluating Staff	71%
Board Operations	67%
Understanding Transit	65%
Marketing	64%
Labor Relations	62%
Legal Aspects	61%
Setting Standards/Evaluating Projects	61%
Communications with Community Organizations	56%
Power Structures	55%
Communications with Labor	52%
Communications with Media	42%
Measuring Board Performance	40%
History of Boards/Transit	25%

d. Curriculum Advisory Committee

As a means of drawing upon the expertise of transit practitioners, a curriculum advisory committee was identified and convened at the University of North Florida on December 13, 1984. Members of the committee were selected based on advice from UMTA staff and drawing upon past participants in UNF/ UMTA transit board training programs.

Those who convened to serve as the Curriculum Advisory Committee were:

Mrs. Beatty Raymond, Board Member  
Greater Bridgeport Transit Board  
Bridgeport, Connecticut

Mr. Ray Cadwellader, Chairman  
Southwestern Ohio Regional Transit Board  
Terrace Park, Ohio

Mr. Charles Morison  
Transit Training Coordinator  
Urban Mass Transportation Administration (UMTA)

Mr. John Meyer  
Executive Director  
Jacksonville Transportation Authority  
Jacksonville, Florida

A full review of goals and the proposed process (Figure 1) for creation of the Transit Board Development Program was conducted for the Curriculum Advisory Committee.

The committee strongly endorsed the need for such programming for public transit board members. While agreeing with the focus on relatively new board members, they urged additional programming for more experienced members and for board chairpersons.

Working from the same list of possible topics as used in the questionnaire, the committee in its deliberations was unanimous in support of the following topics as vital ingredients in the program:

Funding

Planning

Communicating with Local Government Officials

They recommended eliminating the following topics:

Legal Liabilities and Obligations of Board Members

History, Structure and Role of Transit Boards.

The following topics (in no order) were recommended by a majority of the committee:

Service, Rates, and Fares

Identifying and Understanding Power Structures

Labor Relations

Performance Evaluation

Evaluation of Staff

Understanding Transit (Technical Terminology)

Human Relations

Communication between Board and Staff

Communication among Members

Board Operations

Policy-making and Management

Communication with Community Organizations

e. Transit Consultation

To assist in final resolution of curriculum content an external transit consultant was engaged as an additional step to supplement UNF staff review and selection of final curricular topics.

Mr. Wendell Cox, then of the Los Angeles County Transportation Commission and more recently a full-time transit consultant accepted this assignment. Mr. Cox had previously served on the faculty of an UMTA/UNF transit board training program and as Chairman of the APTA Governing Board Committee.

4. Phase 4 - Design Curriculum Components

As the literature and research review, questionnaire and advisory committee recommendations were studied, it was apparent that each of these sources gave priority to more topics than the time constraints (see assumptions) would permit.

Combining of topics was undertaken as a major means of meeting identified needs of public transit board members. Ultimately some recommended topics were eliminated in the belief that the time constraint assumption was realistic in consideration of time available to potential board member participants.

TABLE 3 reflects the curriculum developed for the program showing recommended topics and how they were encompassed in the curriculum:

TABLE 3 - COMBINING RECOMMENDED TOPICS  
TO ESTABLISH CURRICULUM COMPONENTS

<u>Curriculum Component</u>	<u>Recommended Topic Included</u>
Public Transit Today	(Introductory overview)
Role of the Board	{ Planning Policy vs Management Board/ Staff Relations evaluation
Marketing	{ Marketing/Communications with the General Public, Service, Rates and Fares
Funding	Funding
Communications (Preventing Roadblocks)	{ Communication Among Board Members Communication Among Board/ Staff Human Relations of Working Together Board Operations
Communication with other Public Officials	Same
Case Study	Service, Rates, Fares; Understanding Transit
Transit Boards in the Real World: A Simulation	Most of the topics involved

**B. Program Development**

**1. Phase 5 - Determine Training Methodology**

Recognition of the intended audience as adult learners (see assumptions) dictated instructional variety and avoidance of a total lecture format. Content and previous workshop evaluations emphasized the importance of a stress on interaction and discussion. A further consideration as to



methodology was the skill and training strengths of presentors. Finally, it was deemed important that training methodology be varied through the proposed 12-15 hour training format.

To assure that a lecture format not be the exclusive methodology, three of eight topics were created in group process and/or participatory training format. These are: Communications With Other Public Officials—a panel; Case Study—a small group activity; and Transit Boards in the Real World: A Simulation—a total group role playing simulation. In addition both the Role of the Board and Communication components contain optional simulation and/or process type learning resources.

The Program Coordinator's Guide (accompanying the manual) outlines recommended methodology developed for components of the program.

## 2. Phase 6 - Assign To Writer/Presentors

Three criteria were established for selection and assignment of writer/presentors for the writing and field test of the manual:

- . A mixture of qualified academics and experienced practitioners should be chosen for variety and credibility.
- . Some material to be presented by persons other than the writers of the unit. (to test usefulness of the unit by other than the unit writer)
- . Evidence of clear and effective writing skills was to be a guide in selection of writers; similarly evidence of effective speaking and training skills was to be the guide for presentors.

Utilizing these criteria a number of contacts were made with university colleagues, transportation scholars and transit practitioners. These led to the participation of the following as writer/presentors: (brief vitae included as Appendix D).

TABLE 4 - PARTICIPANTS IN CURRICULUM DEVELOPMENT  
AND THEIR ROLES

<u>Participant</u>	<u>Curriculum Topic(s)</u>	<u>Role(s)</u>
<b>Wendell Cox</b>		
Transit consultant, commissioner of Los Angeles County Transportation Commission, 1977-84	Public Transit Today: Setting the Scene	Writer/presenter
	Making Ends Meet (Funding): The Cost Side	Writer/presenter
	The Transit Board in the Real World: A Hypothetical Case Study	Writer/presenter
	Case Study: Transit Service in Downtown Gotham	Writer/presenter
<b>Dr. Harriet B. Harral</b>		
Adjunct faculty at University of North Florida, frequent organizational communication consultant and consultant to boards of directors	Preventing Roadblocks: Communication on the Transit Board	Writer/presenter
<b>James M. Holec, Jr.</b>		
Director of Office of Government Services, Price-Waterhouse, Inc., Washington, formerly senior manager with Peat, Marwick, Mitchell & Co., and frequent transit finance consultant	Making Ends Meet (Funding): The Revenue Side	Writer/presenter

TABLE 4 - continued

<u>Participant</u>	<u>Curriculum Topic(s)</u>	<u>Role(s)</u>
James S. Nations  Member and former chairman of the Bi-State Development Transit Agency (St. Louis)	The Role of the Board	Presentor
Dr. Steven K. Paulson  Professor of Management, University of North Florida, author, researcher, participant in previous UNF/UMTA Transit Board Training	The Role of the Board	Writer
Dr. Jay A. Smith, Jr.  Dean, College of Business Administration, North Texas State University, former director UNF Transportation Center, creator of UNF/UMTA transit board training activities	Marketing	Writer/presenter

### 3. Phase 7 - Prepare Training Manual (draft)

The project goal, assumptions and curriculum scope were reviewed with identified writer/presentors during February and March. Writing of manual units was done individually with revision editing, and production done by project directors at the UNF. From February to April, production of a draft manual in loose leaf form was completed for use at the pilot workshop scheduled for May 1-3, 1985.

## C. Program Testing and Evaluation

### 1. Phase 8 - Conduct Field Test/Evaluation

As a part of the development of the final curriculum manual, the project incorporated a pilot workshop to test several aspects of the training program. The curriculum content, the proposed format, and the training methodologies developed in the initial phases of the grant were evaluated as well as the assumptions developed in the initial phases of the project.

The pilot agenda found in Appendix E was designed to incorporate presentation of the curriculum areas in a pattern designed to support established adult learning theory. A mixture of methodologies including group discussions, case study process, audio/visual presentation, lectures, panel discussion and simulation were paced throughout the pilot program. The program incorporated 12 hours of content presentation. Activities were included to encourage the participants to interact with one another as well as with the consultants during both the work sessions and social activities.

The training program was designed for 20 to 30 participants from a variety of boards throughout the nation. Twenty-two participants attended the pilot program held May 1-3, 1985, in Jacksonville, Florida.

#### a. Selection of Participants

The survey questionnaires sent to transit boards across the nation in November 1984, provided space for respondents to indicate their interest in the pilot program. Of the 142 survey respondents, 75 expressed an interest in attending the workshop.

This group was used as the source from which to develop the 20-30 participants for the pilot program. The following criteria, listed in order of priority, were used to initiate the selection of participants: (1) one person per transit board, (2) number of years served as a transit board member, and (3) a balanced

geographical mix. A need to have both experienced and inexperienced transit board members at the pilot to evaluate the curriculum and program resulted in the inclusion of individuals with a range of years of transit board memberships.

The potential participants were contacted via telephone to improve ability to communicate the nature of the project and the purposes of the pilot program. Through such calls and following letters, each participant was apprised of the content of the program and the UNF's need to have each participant undertake an evaluative role throughout the pilot.

As a result of contacting the transit boards represented by the original 75 respondents, 25 board members accepted the invitation to participate. Of these, 22 people attended the pilot. This group represented 21 different transit boards from 14 states with experience ranging from 3 months to 13 years. Appendix F contains the pilot program participant list.

#### b. Evaluation

As indicated, the pilot was designed to test several aspects of the manual and program format. The evaluation process was developed to specifically address these designated areas. Two evaluation instruments were used and are attached as Appendix G. All evaluations were conducted anonymously and the importance of critical evaluation to project improvement was stressed. Participants were encouraged prior to and during the program to be open and specific with their comments.

The first instrument was designed for participant evaluation of each individual workshop session. These were distributed, completed and collected immediately following each workshop session. With this evaluation tool, participants were asked to rank the strength of their agreement with four statements on a five-point Likert scale ranging from strongly disagree to strongly agree. The four statements can be separated into two categories: 1) content, and 2) presentation of the material. In addition, open ended questions and an opportunity for comments regarding other reactions to the session were provided.

The second instrument was used for participant evaluation of the entire program. This instrument was distributed, completed and collected at the close of the program. A five-point Likert scale was again used to gauge participants' levels of agreement from strongly disagree to strongly agree on six statements.

Additional open-ended questions regarding numerous areas were included in this evaluation format. Summaries of the statistical analysis of evaluations by session and for the overall program are also provided in Appendix G.

The evaluations reflected a high level of participant agreement with the interest level of the subject areas presented in the curriculum. All individual sessions received a rating of 74% or higher in the agree/strongly agree area with funding receiving 89% and the review of the transit situation today receiving a rating of 95.5%

The participants reflected a high level of agreement in the applicability of the content to their functioning as transit board members. The subject area of funding received the highest rating in this category.

In analyzing the evaluations for each session, the information regarding the presentation of material was considered in terms of the methodology utilized, recognizing that the individual style and personality of the presenter influenced the respondents' ratings. Analysis of both evaluation instruments reflects participant concurrence with the pacing of both subject material and presentation methodology.

#### c. Summary of Evaluations

Participant evaluations of the pilot workshop were strongly positive. Some differences in perception of the usefulness of various session topics was noted. But, overall evaluations of the workshop suggested little change and were even more positive than those for individual sessions.

Notably, the responses of participants with differing lengths of transit board experience did not vary significantly. In other words, the responses of newer and more experienced board members to the various evaluative questions were essentially the same. Informal feedback received at lunch, coffee, cocktails, etc. was likewise consistently positive and complimentary.

Thus, in summary the extensive effort to evaluate participant response to the pilot workshop produced results both flattering and frustrating. By any measure the positive evaluations had to be interpreted as indications the curriculum, training methodologies, and workshop faculty were appropriate to the needs of the national sample of transit board members who attended and evaluated the workshop.

At the same time, the evaluation efforts provided the project directors little guidance as they sought to improve the program based on the pilot workshop. The project directors subjectively felt the need for a variety of changes. Several were initiated following the pilot workshop and are incorporated in the final publication. These changes and revisions are described in the following unit of this report.

## 2. Phase 9 - Publish Training Manual

Following the pilot test and evaluation, revisions began on the training manual in preparation for final publication. To assure adequate time for revisions a no-cost extension was sought and received from UMTA extending publication date to August 31, 1985.

Revisions were of two types, additional material to be written and added, and revisions of existing material.

### a. New Material

- (1) Building on knowledge gained in the Pilot a Program Coordinators Guide was written to assist organizations sponsoring transit board training and development programs. In this unit each component of the program is reviewed as to objectives, needed presenter/resource individuals, format and/or process, and time frame. A sample program agenda—based on the pilot—was included.
- (2) An annotated index of additional sources of transit information was developed to provide a guide to further learning and training for transit board members.
- (3) A case study was written of a transit board undertaking changes in board organization to better address its policy role. This unit supplements the program component The Role of the Board.
- (4) An introduction section was written to trace the origin of the manual and its purpose.
- (5) An acknowledgment section was written to recognize those who participate in development of the manual.
- (6) An outline was written to guide the panel discussion on communicating with other public officials.

b. Revisions of existing material

- (1) Extensive re-writing was undertaken of the Role of the Board and Marketing units based on informal expressions that they were not sufficiently clear to all participants and presentors in the pilot.
- (2) Each writer was asked to review the unit he authored for minor changes prior to publication.
- (3) A professional technical editor was engaged to review and edit all manual copy for consistent style and grammatical form.

III. Conclusions

Following are a series of conclusions the project directors believe are supported by the work conducted in this project and reviewed in this report:

- A. No existing body of field research adequately documents the behaviors which lead to effective performance by transit board members or transit boards.
- B. Literature regarding corporate and non-profit boards of directors appears relevant to public transit boards. However, there is significant disagreement among scholars and practitioners as to the extent of differences and similarities among the types of boards, and a resulting lack of clarity as to the extent of applicability of this literature.
- C. There is relatively high but not total agreement among expert practitioners (as represented by the Curriculum Advisory Committee) on the topics which are important to effective performance by public transit board members. A significant disagreement exists over the relative importance of topics highly specific to the transit industry in contrast to topics broadly relevant to the performance of all types of boards.
- D. As indicated by a national sample, there appears to be high agreement among public transit board members regarding topics they consider important to their performance as effective board members.
- E. No single topic or topics dominated those a national sample of public transit board members reported to be important to effective performance. More than 70 percent of respondents identified eleven topics as "important" or "extremely important."
- F. Topics which a national sample of public transit board members believe are important to their effective performance include both topics very specific to transit activity (e.g., funding, service, rates and fares, etc.) and broader, generic topics (e.g., communi-



- cation, distinguishing policy roles from management roles, etc.)
- G. The number of topics which a national sample of transit board members believe important to their effective performance is vast and difficult to fully encompass in the limited instructional time established for this program.
  - H. The curriculum developed for this project—based heavily in the needs reported by a national sample of public transit board members—received strongly favorable evaluation by a second national sample who participated in a pilot workshop.
  - I. Both response to the national survey and evaluation of the pilot workshop indicate a strong desire by public transit board members for training and development programming.
  - J. The program developed in this project meets many documented needs of public transit board members, but can not fulfill their total expressed need in either breadth or depth.
  - K. The size of the training group utilized in the pilot program (and recommended for the program) was an effective and manageable training unit.
  - L. The instructional methods used in the pilot workshop and recommended in the training manual were judged appropriate by participants in the pilot workshop.
  - M. Differences in length of service on public transit boards did not reveal consistent differences in topics believed to be important to effective board performance or in evaluation of topics presented in the pilot program.
  - N. Both formal and informal feedback indicated that transit board members feel a need for specialized training in a variety of topics and for development programs beyond a basic program such as the one resulting from this project.

#### IV. Recommendations

The following are recommendations of the project directors which we believe are documented and justified by work carried in the project and by its conclusions.

- A. Recommendations regarding circulation and use of the Transit Board Development Program
  - 1. The Transit Board Development manual should be made widely available to public transit boards.
  - 2. Transit boards and educational organizations should be granted authority to reproduce the manual to conduct transit board training and development programs.

3. In training usage the manual should be utilized in loose leaf binding to permit updating and local supplementation.
  4. Whenever possible the Transit Board Development Program should be utilized in whole, either as a single program of 12-15 hours, or in a series of training sessions totaling 12-15 hours.
  5. The Transit Board Development Program should whenever possible be conducted for a participant group involving members of several boards, perhaps in a state or regional format. Such a delivery approach will both use resources effectively and add the values of shared experience and discussion of common problems among members of different transit boards.
- B. Recommendations for further research and training or development programs for public transit boards.
1. Field research should be conducted to document those board member and transit board behavior patterns which result in effective policy making.
  2. Additional training or development programming should be established for public transit boards. When present or similar programs are broadly available more in-depth programming should be created for more experienced board members as well as more specialized programming on single topics.

APPENDIX A

BOARDS, BOARDS OF DIRECTORS,  
PUBLIC AGENCY AND TRANSIT BOARDS  
A SELECTIVE BIBLIOGRAPHY

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Some Implications for Board Training  
(source)

Transit Boards

... should be responsible for goals and objectives not involved in daily problems (11)

Training courses in overall planning and operation of transit needed...(11)

Training ... should emphasize the unique role of the board of a special-purpose government body (11)

Instruction should include (a) financial reliance of the public authority and (b) special forms of taxation (11)

Instruction in laws and regulations for special purpose agencies...would be useful (11)

Roles of board and manager must be well defined to avoid conflict (11)

Public Agency Boards

executives in public agencies not accustomed to working effectively with boards (6)

where boards stick to traditional role of rubber-stamping they are looked upon with favor (by executives)...encounters difficulties when violate... tradition that "professional knows best" (6)

public agency board has more difficult task than corporate board (because it represents citizens) (6)

little effort usually devoted to preparing for board meetings and presenting materials (6)

objectives of public agency not as clear as corporation (6)

political battles with other government agencies frequently occur (6)

corporate (business) boards often chosen because of expertise in field of the business...public agency boards are not (6)

service on boards of two agencies (simultaneously) can produce conflict of interest (6)

modest degree of tension between board and executive is normal...but everything possible should be done to minimize (6)

most common and potentially effective channel of communication with public is newspaper (6)

public hearings provide unique opportunity for communication with the public (6)

Board communication with staff (other than executive) are necessary but most operate under agreed upon rules (6)

Board members have a responsibility to be constructively critical (6)

### Corporate Boards (for profit)

...board Members stand in the place of owners..as representatives not agents (5)

...authority of board may be necessary to conduct the business of the corporation (5)

many have large number of inside (employee) directors (5)

purpose: to comply with law; help the CEO; act as trustees for the owners (4)

Two schools of thought on role (1) broad policy, (2) everything (4)

job of the board one of the least studied in the entire spectrum of industrial activities (4)

subject of improving the board should be placed on the agenda of the board (4)

board members should attend seminars, read and bring in authorities to improve effectiveness and modify board practice on the basis of feedback from these (4)

primary purpose is to select capable management...once in place to give support and assistance (6)

### Non-Profit Boards

Good board: inspires, and leads; sees staff as partner; identifies priority needs; cooperates with other agencies and groups; encourages experimentation; searches out sources of information and guidance; organizes itself for optimum production (1)

There are 3 primary communication issues: (1) inter-personal communication between board members, (2) communications between board and staff (3)

communication between board and its publics (2)

to be viable organizations must have on-going training programs (1)

effective training models include: simulation, role-playing (1)

# S.C.R.T.D. LIBRARY

## APPENDIX B

### Evaluation Summary 1983 Transit Board Training University of North Florida

The attached is an excerpt from the evaluation report of the "Effective Policy Making in Transit: the Role of the Board" training program conducted twice in 1983 by UNF. This information provides feedback from the participants regarding key aspects of the two-and-half day program as well as major response to the subject areas. Several suggestions are included which relate to the improvement of the program.

Participants at both the July and August programs were given an opportunity to evaluate the overall training program. They were asked the following questions:

- (1) How many transit programs of this type have you attended?
- (2) How would you compare this program with other such programs you have attended?
- (3) Would you recommend this program to other transit board members?
- (4) What aspects of this program did you like best and least? Why?
- (5) What suggestions do you have for improving this program?
- (6) If you could select two of these sessions to be presented in conjunction with an APTA meeting, which would they be? Why?

Although the responses are difficult to group, some effort will be made to draw generalities from the individual responses.

The predominant response to question 1 was "none." A few of the participants had been to two or more (one listed eight), but most had not. This was true of both the July group as well as the August group. Of those who had been to other transit programs (11), all but one rated the Jacksonville program as considerably better or somewhat better than those previously attended. Only one indicated about average for this question. When asked to explain their assessment, participants commented that the program was well planned, the material was better, the content was excellent, the faculty was well chosen and excellent, and that isolation was a good idea. All respondents indicated that they would recommend this program to other transit board members.

Responses to the question about what the participant liked best and least reveal the widespread interest among the participants. The sessions on "Types, Levels, and Sources of Funding," "Marketing Strategies and Competitive Services," and "Transit Board Member Simulation" were the most frequently listed as "liked best." However, two or more participants also listed "Employee Considerations," "interacting with other board members," "the UNF staff and the organization of the program," "Productivity and Performance Criteria," and "Role of Transit." The only frequently mentioned area which was liked best was the hotel accommodations.

There were many suggestions for improving this program. Several focused on the hotel, but some others included: extend the sessions to five days and add time for small group interaction and discussions and more breaks; regionalize the training sessions so that more board members could attend and try to shorten them to one long day; plan an annual workshop; have more minority involvement; bring in a general manager for topical discussions; have field trips.



The two sessions most frequently selected to be presented in conjunction with an APTA meeting were "Types, Levels, and Sources of Funding" and "Marketing Strategies and Competitive Services." A close third was the simulation exercise. Not surprisingly, many other sessions were mentioned, but those three stood out. In general, participants felt that the information presented in the funding session was both innovative and useful, while the information presented in the marketing session was valuable to successful transit operations. The simulation served many functions, i.e. promoting interaction, crystallizing viewpoints, sensitizing board members, exposing organizational strengths and weaknesses, as well as being enjoyable.

Recommendations:

It is clear from the evaluations that the training program was viewed as valuable and worthwhile by the participants. For many, it was the first of its kind they had ever attended. A great deal of information was presented. Probably of equal importance, many ideas were exchanged and the beginnings of a network were established among transit authority board members.

Future training sessions will be most effective, in our opinion, if:

- (1) The participants are from a broad geographic area. This helps establish an information network from which different perspectives can be shared. Participants seem to be less inhibited when they do not have to consider the effects of their remarks/attitudes on fellow board members at the same property.
- (2) Participants should be similar in terms of total years of experience on transit authority boards. This helps insure that topics, speakers and materials are at a consistent level. To encourage both a large number of participants and meaningful participant experience, we feel that participants should have one to two years of transit authority board experience. This will allow them to have some familiarity with board operations and issues. Also, their interaction with program consultants should serve to renew their enthusiasm and extend their knowledge necessary for the remainder of their first and, possibly, subsequent terms. Finally, it is felt that this will generate the largest number of attendees.

APPENDIX C

STUDY OF MEMBERS OF AMERICA'S TRANSIT BOARDS

We will very much appreciate your assistance in this study. Your responses will be of great value to members of transit boards throughout America. For most of the questions, your answers can be given simply by checking the appropriate box or boxes. Please disregard the numbers before the boxes--they are for tabulation purposes only. THANK YOU.

1. First, would you please check the number of years you have served in the capacity of a transit board member?

1  Less than 2 years                      2  2 to less than 5 years                      3  5 years or more

2. Are you the chairman of the transit board on which you now serve?

1  Yes    2  No

3. Below is a list of areas of possible interest to transit board members in fulfilling their board responsibilities. For EACH one, will you please check how important you feel it is to your being an effective board member? (Please check one box for each area)

	<u>Of little or no importance</u>	<u>Somewhat important</u>	<u>Of average importance</u>	<u>Very important</u>	<u>Extremely important</u>
<u>Legal liabilities and obligations of board members</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>History, structure and role of transit boards</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Planning: approaches to predicting the future of transit, short- and long-term</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Funding and financing transit: types, sources and systems of funding</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Identifying and understanding community power structures</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Marketing transit systems: developing strategies, dealing with competitive services</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Service, routes and fares</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Labor relations; collective bargaining and contract negotiation</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Setting standards and evaluating projects and systems</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Understanding transit: types and sources of information helpful in decision-making</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

4. Thinking now of the board itself -- how important do you feel it is for a board member to be knowledgeable in EACH of the following areas? (Please check one box for each area)

	<u>Of little or no importance</u>	<u>Somewhat important</u>	<u>Of average importance</u>	<u>Very important</u>	<u>Extremely important</u>
The human relations of working together to get decisions made and the job done	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Communications</u> among members of the board	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Board operations:</u> committees, members, etc. Who does what? How does it fit together?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Measuring performance</u> of boards and board members; developing performance standards	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

5. And in terms of board-staff relationships -- how important do you think it is for a board member to be knowledgeable in EACH of the following areas? (Again, please check one box for each listing)

	<u>Of little or no importance</u>	<u>Somewhat important</u>	<u>Of average importance</u>	<u>Very important</u>	<u>Extremely important</u>
<u>Communication</u> between board and staff	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Building and maintaining effective board-staff relations</u>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Policy-making and management:</u> what is properly the work of the board and of the staff?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<u>Evaluating staff</u> productivity and performance	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

6. Several aspects of "outside" communications are listed below. How important do you feel it is for a board member to be skilled in EACH of these to effectively carry out board responsibilities? (Please check one box for each listing)

	<u>Of little or no importance</u>	<u>Somewhat important</u>	<u>Of average importance</u>	<u>Very important</u>	<u>Extremely important</u>
<u>COMMUNICATIONS WITH:</u>					
Media (newspapers, TV, radio)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
The general public	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Community organizations	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Local government officials	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Labor	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

7. In addition to the areas listed in this questionnaire, would you please write in any others which you feel are of significant importance to transit board members in carrying out their responsibilities?

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AND NOW, purely for purposes of cross-tabulating, will you please answer a few questions about your transit system and about yourself?

8. Approximately what is the total population of the area that is served by your transit system? (Please check)

- |   |  |
|---|--|
| <input type="checkbox"/> 1 Less than 50,000 | <input type="checkbox"/> 4 250,000-499,999   |
| <input type="checkbox"/> 2 50,000-99,999    | <input type="checkbox"/> 5 500,000-999,999   |
| <input type="checkbox"/> 3 100,000-249,999  | <input type="checkbox"/> 6 1,000,000 or more |

9. Approximately how many buses are there in your transit system? (Please check)

- |  |  |
|--|--|
| <input type="checkbox"/> 1 None          | <input type="checkbox"/> 4 100-249     |
| <input type="checkbox"/> 2 Fewer than 50 | <input type="checkbox"/> 5 250-499     |
| <input type="checkbox"/> 3 50-99         | <input type="checkbox"/> 6 500 or more |

10. Besides buses, what transit or related responsibilities does your transit system have? (Please check as many as apply)

- |   |  |
|---|--|
| <input type="checkbox"/> 1 Rapid transit (fixed rail) | <input type="checkbox"/> 3 Car or van pools                |
| <input type="checkbox"/> 2 Jitneys                    | <input type="checkbox"/> 4 Other _____<br>(Please specify) |

- 11a. Do you now serve, or have you ever served, as a member of any other board? (Please check ONE box)

- 1 Yes, I NOW serve on other board(s)  
 2 Yes, I USED TO serve on other board(s), but do NOT NOW serve  
 3 No, I have never served on any other board

- b. If you answered "yes" to 11a, will you please check the types of other board(s) on which you now serve or used to serve? (Please check as many as apply)

- |  |   |
|--|---|
| <input type="checkbox"/> 1 Other public agency board | <input type="checkbox"/> 3 For profit corporation               |
| <input type="checkbox"/> 2 Non-profit organization   | <input type="checkbox"/> 4 Other _____<br>(Please specify type) |

12. What is your approximate age?

- |                                     |                                    |  |
|-------------------------------------|------------------------------------|--|
| <input type="checkbox"/> 1 Under 35 | <input type="checkbox"/> 3 45 - 54 | <input type="checkbox"/> 5 65 or older |
| <input type="checkbox"/> 2 35 - 44  | <input type="checkbox"/> 4 55 - 64 |  |

13. Please check whether you are: <sup>1</sup> Male <sup>2</sup> Female

14. What is the highest level of education you achieved? (Please check only ONE box)

- <sup>1</sup> Graduate degree
- <sup>2</sup> College degree
- <sup>3</sup> Attended college, no degree
- <sup>4</sup> High school diploma
- <sup>5</sup> No high school diploma

.....

AND LAST, BUT VERY IMPORTANT -- Part of this project will consist of a two-and-a-half day pilot of the program once it is developed. This pilot course will involve 30 transit board members from across the country, and is being planned for May 1985, in Jacksonville, Florida. There will be no workshop fee for those attending, with lodging and meals provided in a local hotel. Attendees or their transit boards will be expected to pay for transportation to and from Jacksonville.

Do you wish to be considered for participation in this pilot workshop?  
(Please be assured that this does not commit you in any way. It will simply enable us to contact you for a final decision by April, 1985.)

- <sup>1</sup> Yes -- Please print your name, address and phone number in the space provided
- <sup>2</sup> No -- No need to sign your name

Name \_\_\_\_\_

Transit board \_\_\_\_\_

Address \_\_\_\_\_

Phone (include area code) \_\_\_\_\_

MANY THANKS FOR YOUR HELP IN THIS STUDY



# UNIVERSITY OF NORTH FLORIDA

4567 ST. JOHNS BLUFF ROAD, S. JACKSONVILLE, FLORIDA 32216

COLLEGE OF EDUCATION AND HUMAN SERVICES  
OFFICE OF THE DEAN  
904-646-2520

November 30, 1984

May we have your help?

The University of North Florida is working under a grant from the Urban Mass Transit Authority (UMTA) to develop a program designed to assist transit board members in carrying out their board responsibilities.

If the program is to be of significant help, it must concentrate on those areas of real importance to board members. Thus, as a part of this program, we are conducting a study to determine the relative importance of various areas of concern to board members in fulfilling their responsibilities.

Enclosed are three copies of the questionnaire, each accompanied by a covering letter explaining the purpose of the study and by a postage-paid return envelope addressed to the university.

Will you please help us by doing two things?.....

- First, would you personally please fill out and return one of the questionnaires in the envelope provided? Your responses as Board Chairman will be of immense value to the project.
- Second, would you please enlist the cooperation of one of your most experienced board members and one of your least experienced members in filling out the other two questionnaires? Their questionnaires, too, may be mailed directly to the university.

Your participation in the project will be a real contribution to the transit boards throughout the nation since we hope that all of them will benefit by the program resulting from this study. Your promptness in completion of these questionnaires will be of great importance.

Thank you very much for your help.

Sincerely,

George W. Corrick  
Project Director

GWC:mmc



# UNIVERSITY OF NORTH FLORIDA

4567 ST. JOHNS BLUFF ROAD, S. JACKSONVILLE, FLORIDA 32216

COLLEGE OF EDUCATION AND HUMAN SERVICES  
OFFICE OF THE DEAN  
904-646-2520

November 30, 1984

Dear Transit Board Member:

May we ask a favor?

Under a grant from the Urban Mass Transit Authority (UMTA), the University of North Florida is working on a project designed to help transit board members more effectively and efficiently carry out their board responsibilities. As you know, these responsibilities are extremely varied, requiring a number of diverse personal skills and knowledge of transit operation and information.

The object of the joint UMTA-UNF project is to develop a program that will provide board members with a working knowledge in the areas of responsibility that are of prime importance to them.

In determining the scope and content of the program it is essential that we have input from board members themselves. Since you are directly involved in board responsibilities on a continuing basis, you are one of the people best qualified to judge the relative importance of the various areas with which you must deal.

Will you please help us by taking a few minutes of your time to fill out the enclosed questionnaire? Even if you feel that you personally would not benefit from such a program, your responses will make a real contribution to other board members throughout the nation.

For your information, the plan is to make the program available both as a workshop to be held in various locations across the country and as a manual for Transit Boards' own workshop/seminars.

A postage-paid envelope is enclosed for your convenience in replying. Your promptness in completing this questionnaire will be of great assistance.

Many thanks for your cooperation.

Sincerely,

  
George W. Corrick  
Director

GWC:mmc

A Quick Look at the Survey  
of America's Transit Boards

	<u>VERY/EXTREMELY IMPORTANT</u>	<u>PERCENTAGE</u>	<u>SOMEWHAT, LITTLE OR NO IMPORTANCE</u>
TRANSIT SPECIFIC	Legal	62%	15%
	History	25	37
	Planning	81	5
	Funding	95	0
	Power Structures	55	14
	Marketing	64	7
	Service, etc	75	7
	Labor Relations	62	7
	Stos/Evaluating Projects	61	18
	Understanding Transit	65	7
GENERIC	Human Relations	74%	4%
	Comm. among Members	87	2
	Board Operations	67	8
	Measuring Board Performance	40	24
	Comm.-Board/Staff	84%	4%
	Board/Staff Relations	83	3
	Policy vs Management	81	2
	Evaluating Staff	71	6
	Comm./media	42%	19%
	Comm./general public	71	7
	Comm. organization	56	8
	Local Government	82	1
	Labor	52	13



Highest Responses

Transit Specific Topics

Funding - 95%  
Planning - 81%  
Service, rates, fares - 75%

---

70%

Understanding Transit - 65%  
Marketing - 64%  
Labor - 62%  
Legal - 62%  
Stds/Eval. - 61%

---

60%

Power structures - 55%  
History of Boards/Transit - 25%

"Generic" Topics

Communication among Board Members - 87%  
Communication among Board/staff - 84%  
Board/Staff Relations - 83%  
Comm. w/other local Gov't officials - 82%  
Policy vs Management - 81%  
Human Relations of working together - 74%  
Communication w/general public - 71%  
Evaluating staff - 71%

---

70%

Board operations - 67%

---

60%

Communications w/community Orgs. - 56%  
Communications w/Labor - 52%  
Communications w/Media - 42%  
Measuring Board Performance - 40%

## Profile

### Time on Board

Less than 2 years	- 22%
2 to 5 years	- 29%
5 years and up	- 49%

### Chairman

no	- 63%
yes	- 37%

### Area Served

Less than 100,000	- 18%
100,000 to 49,999	- 42%
250,000 to 999,999	- 13%
1 million or more	- 8%

### System Size (buses)

Fewer than 50	- 40%
50 to 99	- 27%
100 to 249	- 23%
more	- 9%

### Other Responsibilities

Rapid Transit	- 5%
Jitney	- 5%
Car/Van pools	- 32%
other	- 61% (?)

### Serve/or served on other boards

yes, now	- 68%
use to (not now)	- 20%
no, never	- 12%

Type of other boards served on

other public agency - 55%  
Non-profit - 51%  
For-profit - 23%  
other - 15%

Age

under 35 - 7  
35 - 44 - 18  
45 - 54 - 26  
55 - 64 - 28  
65 + - 21

Sex

male - 84%  
female - 16%

Education

Graduate degree - 33  
college degree - 36  
college/no degree - 17  
High School only - 11  
Less than H.S. - 3

APPENDIX D

**Biographical Data  
Workshop Consultants**

WENDELL COX  
Transit Consultant

Mr. Wendell Cox has recently become a full time transit consultant after service as a commissioner with the Los Angeles County Transportation Commission from 1977 through 1984.

Mr. Cox has been active on the national transit scene participating as a member and/or adviser to various transit organizations including: the National Academy of Sciences, Urban Mass Transportation Administration (UMTA), the U.S. Department of Transportation, and the American Public Transit Association (APTA). He received his MBA from Pepperdine University after earning his undergraduate degree in Political Science from the California State University, Los Angeles.

DR. HARRIET B. HARRAL  
Director of Training and Staff Development  
City of Jacksonville

As Administrative Aide to Jacksonville Mayor Jake Godbold, Dr. Harral coordinates and directs managerial and general employee development training programs for local government.

Dr. Harral holds the Ph.D. in Communications Theory degree from the University of Colorado. She is an organizational communication consultant to many organizations. Dr. Harral has conducted training for a number of professional and non-profit boards of directors. In addition, she is an adjunct professor of communication at the University of North Florida.

JAMES M. HOLEC, JR.  
Director of Office of Government Services  
Price Water-House, Inc.

Before assuming his present position, Mr. Holec was a senior manager with Peat, Marwick, Mitchell & Co. He developed and managed Peat Marwick's feasibility consulting activities for the urban transit industry. In addition, Mr. Holec has provided financial planning services to the Los Angeles County Transportation Commission's capital development program.

Mr. Holec holds a B.S. in Industrial Engineering, and M.A. in Economics, and formal graduate certification in Urban Transportation. He has consulted in the transportation industry for ten years in areas of specialization which included: Urban Transportation Management and Finance, Transit Performance Evaluation, and Transportation Policy and Program Evaluation.

JAMES S. NATIONS  
Branch Manager, Information Systems, AT&T  
St. Louis, Missouri

Mr. Nations received his MBA from Washington University and completed his undergraduate work at Southern Illinois University. He is serving his second five year term as Commissioner with the Bi State Development Transit Agency. He previously served as Chairman of the Bi State Transit Board and is the current Chairman of the Transportation Committee.

Mr. Nations serves on many planning boards including: the East-West Gateway Coordinating Board, Fairview Heights Economic Development Commission, the St. Clair County Building Commission and was an Alderman with Fairview Heights during the city's original formation in 1969.

DR. JAY A. SMITH, JR.  
Dean of the College of Business Administration  
North Texas State University

Dr. Smith has served as a faculty member and director of Transportation and Logistics Departments at the University of North Florida, Southern Illinois University, and the University of Maryland.

In addition to extensive consulting experience with both government and private industry, Dr. Smith has been a principal investigator for funded research projects in the fields of transportation, economic development, transit unions and management, and transportation education. He has served on numerous boards including the Transportation Research Board of the National Academy of Sciences and as a gubernatorial appointment to represent Florida on the Multi-State Transportation Board.

APPENDIX E

Pilot Workshop

Transit Board Development  
Program

May 1-3, 1985

Sheraton-St. Johns Place  
Jacksonville, Florida

Wednesday, May 1

4-6 p.m. Registration - Main Lobby

6 p.m. Cocktail Reception - Lounge (Dockside Room)

7 p.m. Dinner - Dockside Room

Welcome and Introductions

Dr. Curtis L. McCray, President  
University of North Florida

Dr. George W. Corrick, Director  
UNF/UMTA Board Development Program

Public Transit Today:  
Setting the Scene

Wendell Cox  
Transit Consultant  
Former Commissioner  
Los Angeles County Transportation  
Commission

Thursday, May 2 - Tug Room

Breakfast on your own

8:30 a.m. Workshop Overview

Dr. Corrick

8:45 a.m. The Role of the Board

James S. Nations  
Former Chairman  
Bi State Development Agency  
St. Louis, Missouri

10:00 a.m. Break

10:45 a.m. Preventing Roadblocks:  
Communication on the  
Transit Board

Dr. Harriet Harral  
Communications Consultant  
Adjunct Faculty  
University of North Florida

Noon Lunch - Riverwalk

1:00 p.m. Marketing: Customers,  
Needs and Responses

Dr. Jay Smith, Dean  
College of Business Administration  
North Texas State University

2:00 p.m. Break

2:15 p.m. Making Ends Meet: James M. Holec, Jr., Director  
Office of Government Services  
The Revenue Side Price-Waterhouse, Inc.  
The Cost Side Wendell Cox

3:30 p.m. Case Study Workshop Staff/Wendell Cox

Dinner on your own

Friday, May 3 - Tug Room

8:00 a.m. Buffet Breakfast

Panel: Communicating With Other Public Officials  
Moderator: Dr. Andrew A. Robinson, Vice Chairman  
Jacksonville Transportation Authority  
William O. Birchfield  
Former Chairman  
Jacksonville Transportation Authority  
Don McClure  
Chief Administrative Officer  
City of Jacksonville  
James C. Rinaman, Jr.  
Former Member  
Jacksonville Transportation Authority  
Robert Schellenberg  
Jacksonville City Councilman

9:30 a.m. Transit Boards in the Real World: A Simulation  
Wendell Cox  
(group participation)

11:00 a.m. Summary, wrap-up and Evaluation of Workshop

11:30 a.m. Workshop Adjourns Workshop Staff

APPENDIX F

University of North Florida  
Transit Board Development Program

May 1 - 3, 1985

Participants

Mr. Walter Auger, Chairman  
Greater Bridgeport Transit District  
525 Water Street  
Bridgeport, Conn. 06604

Phone (203) 377-2000

Ms. Shelda J. Beener  
Metropolitan Transit Authority  
of Black Hawk County  
809 Maplewood Drive, #102  
Cedar Falls, Iowa 50613

Phone (319) 296-2320

Mr. Timothy Birnie  
P.O. Box 630  
Birnie Bus Service, Inc.  
Rome, NY 13440

Phone (315) 336-3950

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Altoona Metro Transit  
3301 5th Avenue  
Altoona, PA 16602

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Chattanooga Area Regional Transit  
Authority  
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Richfield, Minn. 55423

Phone (612) 349-7400

Mr. N. Armen Debejian  
Utica Transit Authority  
130 Melrose Avenue  
Utica, NY 13501

Phone (315) 797-1121

Mr. Bernard G. Gilluame  
Pinellas Suncoast Transit Authority  
11331-80 Avenue North  
Seminole, FL 33542

Phone (813) 397-3363

Mr. Sean Guard  
C-Tran  
P.O. Box 2529  
Vancouver, WA 98668-2529

Phone (206) 835-2155

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APPENDIX G  
University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

1. Please evaluate this session by indicating your level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree."

	1	2	3	4	5
a) The material in this session interested me.					
b) The material in this session will assist me in my functioning as a transit board member.					
c) The presentation of the material in this session was clear and understandable.					
d) The consultant for this session was knowledgeable and well-prepared.					

2. I have attended seminars regarding this subject before.

\_\_\_\_\_ yes          \_\_\_\_\_ no

Comments:

3. I think this session went well because...

4. I have the following suggestions for improving this session...

5. My years of transit board experience are: (circle one)

1 2 3 4 5 6 7 8 9 10

University of North Florida

Transit Board Development Program

May 1-2, 1985

Overall Program Evaluation

1. Please evaluate this program by indicating your level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree."

	1	2	3	4	5
a) Generally, I found the speakers were well informed on the topics.					
b) I thought the speakers were well aware of the listener's level of knowledge and frame of reference.					
c) Generally, I felt the speakers communicated the messages in an effective manner.					
d) In general, I was satisfied with this program.					
e) I would recommend this program to others.					
f) The facilities (meeting rooms, etc.) for this program were adequate.					

2. For me, the pace at which the instructors covered the material during the program was:

- a) Very slow                      b) Somewhat slow                      c) Just about right  
 d) Somewhat fast                      e) Very fast

3. Was group size satisfactory for the method of conducting the program?
- a) Yes, most of the time                      b) No, group was too large
- c) No, group was too small                      d) It didn't make any difference

4. Overall, do you think the various topics were covered adequately?

Yes \_\_\_\_\_ No \_\_\_\_\_

Which topics should have been covered more in-depth?

5. Do you think the sequencing of topics was conducive to the overall learning process?

6. Please list topics you feel should have been included in the program.

7. Other comments.

University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

Public Transit Today: Setting the Scene  
Wendell Cox

22 Participants      22 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree."

	1	2	3	4	5
a) The material in this session interested me.	-0-	-0-	1 or 4.5%	10 or 45.5%	11 or 50%
b) The material in this session will assist me in my functioning as a transit board member.	-0-	-0-	7 or 32%	9 or 41%	6 or 27%
c) The presentation of the material in this session was clear and understandable.	-0-	-0-	2 or 9%	7 or 32%	13 or 59%
d) The consultant for this session was knowledgeable and well-prepared.	-0-	-0-	1 or 4.5%	4 or 18%	17 or 77%

\* Percentages have been rounded and may not sum to exactly 100.

2. I have attended seminars regarding this subject before.

  6   yes       16  no

Comments:

- First Board focus at a seminar specifically for transit.

3. I think this session went well because...

- The ice was broken and a stage set for a good deal of interaction in following sessions.
- Very good explanations.
- The audience was enthusiastic and very interested in the subject.
- The speaker was knowledgeable - questions and answers were lively.

Question #3 continued -

- Informative and to the point.
- Provided many views.
- Group response was positive.
- Information provided was well delivered and ties in well.  
Good start.
- 1) Harriett's "get acquainted" exercise was a good intro.
- 2) discussion was very open and the moderator allowed a good exchange of views/information.
- The speaker covered a very complex subject in a short time - a provocative key note.
- Mr. Cox gave an honest overview of the transit funding situation. He also provided facts about the transit system is changing and how that will affect the future.
- Of the ideas put forth and the questions raised and interaction between members of the group.
- It stimulated a good discussion.
- It was well prepared and understandable.
- Of informality of approach, inviting maximum participation.
- Knowledgeable speaker. Welcome-get acquainted activities (social hour and mixer) well done.
- We are all interested in the subject. The presentation hit the main concerns we all have.
- Immediate response - enthusiasm.
- It was a good introduction and good speaker to set tone of conference.
- Of audience participation.

4. I have the following suggestions for improving this session...

- none
- More rap time.
- Possibly break it into 3-4 5-10 minute slots throughout program.
- Less time on introduction of attenders and more time for the speaker/discussion.
- Let him (Mr. Cox) talk more. I enjoyed the question and answer period.
- None - well done.
- By limiting comments from single participants.
- Limit members to time when talking on floor.
- none
- none
- Make it a little shorter.

5. My years of transit board experience are: (circle one)

(years)	0-1	2	3	4	5	6	7	8	9	10+
(response)	9	2	2	1	1	0	1	0	0	6

University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

The Role of the Board

James S. Nations

21 Participants      21 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree".

	1	2	3	4	5
a) The material in this session interested me.	-0-	-0-	4 or 19%	9 or 43%	8 or 38%
b) The material in this session will assist me in my functioning as a transit board member.	-0-	1 or 5%	7 or 33%	4 or 19%	9 or 43%
c) The presentation of the material in this session was clear and understandable.	1 or 5%	1 or 5%	4 or 19%	5 or 24%	10 or 48%
d) The consultant for this session was knowledgeable and well-prepared.	2 or 9.5%	-0-	-0-	5 or 24%	14 or 67%

\* Percentages have been rounded and may not sum to exactly 100.

2. I have attended seminars regarding this subject before.

6 yes      15 no

Comments:

- Information was useful, however emphasis on a more service level of board organization would be better.

3. I think this session went well because. . .

- The speaker was knowledgeable and well prepared.
- The speaker was knowledgeable, well prepared, answered questions, and was able to elicit participation and questions.
- Visual aids were presented.
- It offers many subjects that could be applied to individual sessions.
- Well prepared.
- Well organized.
- Well organized in his material.

Question #3 continued -

- Presenter was well prepared.
- Good delivery. Speaks well.
- Speaker knew subject.
- Kept to schedule.
- The presentation was excellent. It's easy to see why his group is effective -- his information was very helpful.
- We learned how in St. Louis they got their act together.
- The overall idea of providing leadership as a Board instead of just management is valuable.
- High caliber of leader.

4. I have the following suggestions for improving this session...

- I would have liked more examples and suggestions for implementing this leadership style. The presentation was too general - not enough specifics.
- More time explaining the nature and structure and complexity of his agency which I assure is much broader in scope than is the case with most of the attenders.
- Felt it was too closely related to one authority's problems.
- Relate ideas from large board to small board. Find out sizes of systems represented.
- More generic board organization discussion.
- I would have appreciated copies of the slides of components for measuring, etc.
- Also, having a discussion more directly applicable to smaller systems.
- Too verbal - more group discussion needed.
- A little more broad. Not so much related to one systems ways.

5. My years of transit board experience are: (circle one)

(years)	0-1	2	3	4	5	6	7	8	9	10+
(response)	8	2	2	1	1	0	1	0	0	6



University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

Preventing Roadblocks:  
Communication on the Transit Board

Dr. Harriet Harral

21 Participants      21 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree".

	1	2	3	4	5
a) The material in this session interested me.	2 or 9.5%	1 or 5%	2 or 9.5%	5 or 24%	11 or 52%
b) The material in this session will assist me in my functioning as a transit board member.	1 or 5%	2 or 9.5%	6 or 28.5%	5 or 24%	7 or 33%
c) The presentation of the material in this session was clear and understandable.	-0-	2 or 9.5%	3 or 14%	7 or 33%	9 or 43%
d) The consultant for this session was knowledgeable and well-prepared.	-0-	1 or 5%	3 or 14%	8 or 38%	9 or 43%

\* Percentages have been rounded and may not sum to exactly 100.

2. I have attended seminars regarding this subject before.

5 yes      16 no

Comments:

- Have attended seminars on communication but not specifically on transit board/staff.
- I have attended several communications and listening skills workshops.
- I rely on the manager for good communication. In this session, I expected a lot more from Dr. Harral than was received.
- Interesting to see how well my board really works.
- I think the time spent on this session could have been added to the other sessions.

3. I think this session went well because...

- Of the leader.
- No. Think Harriet lost control - sometimes the discussion wasn't on the right subject.
- The topic was interesting.
- Well-prepared. Some useful material in Appendix - evaluation sheets would (be) more useful if transit specific.
- Dr. Harral's personality excels. Continuous board training is of great importance.
- Open discussion.
- No. too verbal (often read to us).
- Speaker knowledgeable and solicited participation.
- Speaker prepared, gave good suggestions, useful material.
- It provided me with a lot of information that I can apply to make our board function with better structure.
- I don't think it was good because we didn't work with a strong committment for developing good communication.
- Good subject. Great interaction.
- Was perhaps unnecessary for most of us who have served on boards for years - know about the importance of committee work.
- Good group questions/comments.

4. I have the following suggestions for improving this session...

- Need to discuss small boards - larger boards.
- Perhaps make more transit oriented which I recognize is not easy.
- Have the questioners done after the session - they were not of benefit to her presentation.
- Yes, would have been much more effective if - role played a communication situation - then panel discussion of role play situation (also group discussion). Expert would go back and make suggestions on how to improve communication. Group could role play given situations and then discuss - would keep group interest!
- Add a little emphasis on how to effectively communicate when constrained by open government laws.
- Try to make subject material more specific to transit.
- Again information on various board sizes, etc. would be helpful.
- There was so much to cover in such a short time. We seemed to jump from one thing to another. Perhaps a lecture format for 1/2 hour or so and then questions and answers would have been better.
- Tell and show those present how to properly communicate. Too long-----.
- Needs to be longer.
- With such a diversity of agencies represented it is difficult to compare experience.

5. My years of transit board experience are: (circle one)

(years)	0-1	2	3	4	5	6	7	8	9	10+	
(response)		8	2	2	1	1	0	1	0	0	6

University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

Marketing: Customers, Needs and Responses

Dr. Jay Smith

21 Participants      19 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree".

	1	2	3	4	5
a) The material in this session interested me.	-0-	-0-	3 or 16%	8 or 42%	8 or 42%
b) The material in this session will assist me in my functioning as a transit board member.	-0-	2 or 10.5%	6 or 31.5%	8 or 42%	3 or 16%
c) The presentation of the material in this session was clear and understandable.	-0-	2 or 10.5%	4 or 21%	8 or 42%	5 or 26%
d) The consultant for this session was knowledgeable and well-prepared.	-0-	1 or 5%	4 or 21%	4 or 21%	10 or 53%

\* Percentages have been rounded and may not sum to exactly 100.

2. I have attended seminars regarding this subject before.

  5   yes       14  no

Comments:

- Nothing in Marketing before.
- But not specific to transit.
- You need to work on your jokes.

3. I think this session went well because...

- Of the expertise of the speaker.
- Informative.
- Session would have been better with more time, however Dr. Smith's expertise provided an informative session.
- This is a subject that needs input from the board on a continuing basis.

Question #3 continued -

- Speaker was well informed.
- Things were presented in a logical, concise manner, in average words.
- Not all that well.
- Yes - some good points (concepts) were brought up.
- No comment.
- He is well versed and a sympathetic type of professor.
- Practical advise.
- Interesting discussion leader.

4. - Too philosophic - but maybe specifics are in printed material.
- More time to provide for group interaction.
  - Need time for questions.
  - None.
  - Dr. Smith is not as familiar with or sympathetic to the run of the mill board members. If I were a university professor I would have benefited more.
  - More involvement of group, less talk by presenter.
  - Keep the verbal presentation on the subject.
  - No tie in with the course heading Marketing.
  - Less verbal.
  - No comment.
  - Give him more time for detail explanation.
  - If the room were not cold.

5. My years of transit board experience are: (circle one)

(years)	0-1	2	3	4	5	6	7	8	9	10+
(response)	7	2	2	1	1	0	1	0	0	5

University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

Making Ends Meet: The Revenue Side

James M. Holec, Jr.

21 Participants      18 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree".

	1	2	3	4	5
a) The material in this session interested me.	-0-	1 or 5.5%	1 or 5.5%	7 or 39%	9 or 50%
b) The material in this session will assist me in my functioning as a transit board member.	1 or 5.5%	2 or 11%	1 or 5.5%	9 or 50%	5 or 28%
c) The presentation of the material in this session was clear and understandable.	2 or 11%	2 or 11%	3 or 17%	6 or 33%	5 or 28%
d) The consultant for this session was knowledgeable and well-prepared.	1 or 5.5%	1 or 5.5%	3 or 17%	5 or 28%	8 or 44%

\* Percentages have been rounded and may not sum to exactly 100.

2. I have attended seminars regarding this subject before.

  3   yes       15  no

Comments:

- Well done.
- Poor speaker.
- Not a good public speaker.

3. I think this session went well because. . .

- Of general participation.
- Of the preparation of the presenter.
- The room was warmer.
- Didn't show how or why the course he was speaking on related.
- Was presented in a rather casual way.
- Relative info. to our problems.

Question #3 continued -

- brief and concise.
- Significant data given - anxious to study it!
- OK - little too verbal - but did have some handouts and audio visual.
- I don't think it did. I didn't get much from Jim's talk. Wendall gave more of what I needed.
- Good participation by all.
- Information was very pertinent.

4. I have the following suggestions for improving this session...

- Needed more time.
- Get a better speaker.
- At this time of the afternoon speaker should have bounce and be alive!
- A more inspired speaker might have interested me more on his subject.
- Possibly some visuals.
- More time!!
- No
- More introduction to what is going to be done. Things seemed disorganized. There wasn't a clear idea of what his point was.
- More time.

5. My years of transit board experience are: (circle one)

(years)	0-1	2	3	4	5	6	7	8	9	10+	No response
(response)	7	2	2	1	1	0	0	0	0	4	<u>1</u>

University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

Making Ends Meet: The Cost Side

Wendell Cox

21 Participants    17 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree".

	1	2	3	4	5
a) The material in this session interested me.	-0-	-0-	3 or 17.5%	4 or 23.5%	10 or 59%
b) The material in this session will assist me in my functioning as a transit board member.	-0-	1 or 6%	3 or 17.5%	7 or 41%	6 or 35%
c) The presentation of the material in this session was clear and understandable.	-0-	1 or 6%	2 or 12%	6 or 35%	8 or 4
d) The consultant for this session was knowledgeable and well-prepared.	-0-	1 or 6%	-0-	7 or 41%	9 or 53%

\* Percentages have been rounded and may not sum to exactly 100.

2. I have attended seminars regarding this subject before.

  3   yes       14  no

Comments:

- Well done.

3. I think this session went well because. . .

- Wendell gave the information I was looking for.
- So well planned.
- A lively presentation.
- His knowledge and delivery.
- Relative info. to our problems.
- Mr. Cox's knowledge of the material and clear presentation.
- Good participation by all.
- OK.

Question #3 continued -

- No comment.
- The financing/cost issues are at the crux of transit operation.
- Of the preparation and expertise of the presenter. Gave good information.

4. I have the following suggestions for improving this session...

- More audience participation.
- Have at least annual sessions with new board members attending.
- Possibly some visuals.
- More time for dialogue.
- None
- No
- No comment.

5. My years of transit board experience are: (circle one)

(years)	0-1	2	3	4	5	6	7	8	9	10+	No response
(response)	7	2	2	0	1	0	1	0	0	3	1



University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

Case Study:

Transit in Downtown Gotham

21 Participants      17 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree".

	1	2	3	4	5
a) The material in this session interested me.	-0-	3 or 17.5%	1 or 6 %	4 or 23.5%	9 or 53%
b) The material in this session will assist me in my functioning as a transit board member.	-0-	3 or 17.5%	3 or 17.5%	4 or 23.5%	7 or 41%
c) The presentation of the material in this session was clear and understandable. **	-0-	3 or 19%	1 or 6%	4 or 25%	8 or 5
d) The consultant for this session was knowledgeable and well-prepared. ***	-0-	1 or 9%	-0-	4 or 36%	6 or 55%

\* Percentages have been rounded and may not sum to exactly 100.

\*\* 1 no response on c above (based on 16 responses).

\*\*\* 6 no responses on d above (based on 11 responses).

2. I have attended seminars regarding this subject before.

4 yes                  13 no

Comments: (none)

3. I think this session went well because...

- Good working group.
- Those participating were very knowledgeable because we all participated in this exercise.
- Group interaction.
- Opportunity for group dynamics.
- Yes.

Question #3 continued -

- The enthusiasm of the entire group.
- Yes, the Best yet.
- It was quickly pulled off - problems clearly stated.
- Group application!
- It allowed us to interact with others to solve a problem. It was an active involvement exercise that raised my energy level.
- Chance to interact with others. Need more of this type of exercise.

4. I have the following suggestions for improving this session...

- None
- More of the same - working sessions are the best!
- No suggestions for improving.
- None

5. (years) 0-1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10+

(response) 6 | 2 | 2 | 1 | 1 | 0 | 1 | 0 | 0 | 4

University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

Panel: Communicating With  
Other Public Officials

21 Participants      19 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree".

	1	2	3	4	5
a) The material in this session interested me.	-0-	1 or 5%	4 or 21%	4 or 21%	10 or 53%
b) The material in this session will assist me in my functioning as a transit board member.	1 or 5%	3 or 16%	6 or 31.5%	5 or 26%	4 or 21%
c) The presentation of the material in this session was clear and understandable.	-0-	1 or 5%	5 or 26%	6 or 31.5%	7 or 37%
d) The consultant for this session was knowledgeable and well-prepared.	-0-	1 or 5.5%	4 or 22%	5 or 28%	8 or 44%

\* Percentages have been rounded and may not sum to exactly 100.

\*\* 1 no response on d (based on 18 responses).

2. I have attended seminars regarding this subject before.

  7   yes        12   no

Comments:

- This was an excellent session with a great mix on the panel.
- Great job!

3. I think this session went well because. . .

- Provided many different views as to how to deal with the media and the importance of communicating.
- It was a good mix.
- Interaction between panel and participants.
- Good exchange of different perspectives by Schellenberg and Birchfield.
- All four men were good speakers, at least I could hear what they said. Schellenberg was best - he spoke a shorter time but wasn't worried about the party line.

Question #3 continued -

- Yes.
- Everyone was involved.
- Enjoyed dialog between Schellenberg and Birchfield - (found McClure to have a superior attitude).

4. I have the following suggestions for improving this session...

- Because of the diversity of transit boards - the session should be the broad subject of communications not just with public officials.
- Keep Mr. McClure home!
- Mayor's Aide did not add much.
- The situation varies too greatly from city to city.
- Pre-written questions for all the group could have had more people involved and avoid any flat stop.
- Make it more exciting - it was dead.
- More emphasis on specific difficulty in communicating - far too general with nothing new suggested.

5. My years of transit board experience are: (circle one)

(years)	0-1	2	3	4	5	6	7	8	9	10+
(responses)	8	2	2	0	2	0	1	0	0	4

University of North Florida  
Evaluation

Transit Board Development Program

May 1-3, 1985

Transit Boards in the Real World: A Simulation

Wendell Cox

21 Participants      17 Evaluations

1. Participants evaluated this session by indicating their level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree".

	1	2	3	4	5
a) The material in this session interested me.	-0-	1 or 6%	1 or 6%	4 or 25%	10 or 63%
b) The material in this session will assist me in my functioning as a transit board member.	-0-	2 or 12.5%	2 or 12.5%	5 or 31%	7 or 44%
c) The presentation of the material in this session was clear and understandable.	-0-	-0-	3 or 19%	5 or 31%	8 or 50%
d) The consultant for this session was knowledgeable and well-prepared.	-0-	-0-	-0-	7 or 44%	9 or 56%

\* Percentages have been rounded and may not sum to exactly 100.

\*\* 1 person - no response on a,b,c, or d (all percentages based on 16 responses).

2. I have attended seminars regarding this subject before.

  5   yes        12   no

Comments:

- Other sessions dealing with group meetings.

3. I think this session went well because. . .

- The audience was.
- Of the advance preparation.
- A super idea. Group was well-chosen and did well.
- Very enjoyable.
- I liked the active involvement.
- In a short period the authority members put on a good show.
- Very well done - need more of this type of exercise.
- All participants are on the front line and deal with these problems.

Question #3 continued -

- Yes.

4. I have the following suggestions for improving this session...

- Staff feedback after session - their observations.
- Make them longer.
- Not sure this exercise needed unless the group is composed of new board members.
- It was fun but not that constructive.
- None
- None
- More rehearsal needed. Too many holes. Put it earlier in program.

5. My years of transit board experience are: (circle one)

(years)	0-1	2	3	4	5	6	7	8	9	10+	No response
(response)	6	2	2	0	1	0	1	0	0	12	2

University of North Florida

Transit Board Development Program

May 1-3 1985

Overall Program Evaluation

21 Participants

20 Evaluations

1. Please evaluate this program by indicating your level of agreement with the following statements using a scale of 1 to 5 with 5 being "Strongly Agree" and 1 being "Strongly Disagree."

	1	2	3	4	5
a) Generally, I found the speakers were well informed on the topics.	-0-	-0-	-0-	7 or 35%	13 or 65%
b) I thought the speakers were well aware of the listener's level of knowledge and frame of reference.	-0-	-0-	3 or 15%	12 or 60%	5 or 25%
c) Generally, I felt the speakers communicated the messages in an effective manner.	-0-	-0-	2 or 10%	14 or 70%	4 or 20%
d) In general, I was satisfied with this program.	-0-	-0-	-0-	5 or 25%	15 or 75%
e) I would recommend this program to others.	-0-	-0-	-0-	5 or 25%	15 or 75%
f) The facilities (meeting rooms, etc.) for this program were adequate.	1 or 5%	2 or 10%	1 or 5%	8 or 40%	8 or 40%

2. For me, the pace at which the instructors covered the material during the program was:

- a) Very slow                      b) Somewhat slow                      c) Just about right  
d) Somewhat fast                      e) Very fast

Responses: a) none    b) 1    c) 19    d) none    e) none

3. Was group size satisfactory for the method of conducting the program?

- a) Yes, most of the time
- b) No, group was too large
- c) No, group was too small
- d) It didn't make any difference

Responses: a) 20    b) none    c) none    d) none

4. Overall, do you think the various topics were covered adequately?

Yes   19              No   0              No response   1  

What topics should have been covered more in-depth?

- Types of financing in other areas.
- Budget info. was confusing because man from Price-Waterhouse switched topics too much.
- Communications.
- With the current funding more time could have been allowed for discussing of innovative answers and approaches to the funding issue. Actual data on funding "success" stories would have been helpful.
- Communications should have been broader. For example, communication between board members and staff.
- The Cost/Revenue session. Budgeting is a high priority and more information on what to do with the financial crunch would be helpful. Expand these sessions.
- Yes for anyone with some experience on a transit board.
- Communication at all levels. This cannot be stressed enough.
- Communication on the Transit Board.
- Finance.
- Communication, which I felt needed to be studied closer.
- Relation of Board with politicians.
- Communication with public officials too general. No objection to panel but I would have preferred having a member of each group to tell us specifically what they need and want.
- Just about right.
- Communications.
- Board liability. Various alternate structures of transit boards.
- More "creative" financing ideas.
- A little more on communications would have been helpful to me. Less Cost/Revenue and should have been less technical, more fundamental or overview.

5. Do you think the sequencing of topics was conducive to the overall learning process?

  17   yes              -0-   no              1   no response

- Overall flow was very good.
- Flowed very well.
- Dr. Harriet Harral should have come either earlier or not at all.
- Would suggest concluding with a future perspective - and perhaps in-pit from the group on what they would like to see - concluding



Question #5 continued -

- exercise fun but not educational for me.
- Very good planning.

6. Please list topics you feel should have been included in the program.

- More in dealing with public - in terms of education - selling our program, etc. Perhaps more suggestions for co-ordination of total transit, looking at various ways to do this -.
- Dealing in a positive constructive manner with public officials.
- Perhaps a small discussion of effective tools/techniques for dealing with the news media in good/bad times.
- More solutions on finances.
- Have discussion of the different problems faced in providing buses vs. light rail vs. rail etc.
- A session exploring more fully the roles of staff vs. board members with presentations by transit staff.
- How to bring up the issue of leadership to the board back home. That is, if our G. M. is leading us, how can I raise the issue of changing the focus of leadership?
- A little of the actual funding process from Federal - State - to transit authority on capital funds - State funds.
- None occur to me at the moment, thinking back will probably bring some to mind.
- I think the ones that were covered were adequate. I wouldn't replace any and to add more would make for a longer program which may be detrimental to the process.
- Felt for the time - it was a good mix.
- Time constraints do not allow inclusion of other topics.
- Process of budget making.
- A lesson in basic politics.
- Reference #4 - Interaction of transit with economic growth actions/policies.
- Personal interaction of board - how to assess and facilitate best working relationship, maximizing individual strengths and minimizing weaknesses.

7. Other comments.

- Your evaluation form - #3 (on individual sessions) makes some assumptions - perhaps should include possibility that it didn't go as well as we would have liked. Overall - impressed with your work. Kept us on track. Great hospitality.
- Some planned activity in the community - i.e. beach party or cook out rather than a dinner. Presenters should stay around after they have given their comments so that we can ask questions in private!!
- Good job.
- I enjoyed and benefitted from this program. Material was generally relevant and covered in a manner which retained attention. However, one or two of the speakers could have been more effective by lecturing less and inviting more group participation.

- The biggest problem I face is with staff that does not understand or appreciate board involvement in setting policy and accountability. Perhaps you should include staff in future training.
- This program has been most helpful for me. I was impressed with the organization of the conference and how we were kept "on target." Much information that I can apply to my local system was provided. You have done a fine job! P.S. I also enjoyed the bus trip. Thank you.
- Format change - day two end 11:30 - 11:45 a.m. Quick tour of city (possibly local transit). (Then) lunch somewhere other than hotel. Possibly use local transit board room for a session. This type of session should be done on a regional level.
- The program and ideas are very useful to any board member and perhaps even to non-members.
- Well organized. Should serve as a model for future programs of this type. Participants should identify the type of system and size at the outset, this would not take long and could be very helpful as the sessions progress.
- Choice and makeup of speakers was terrific.
- Afternoon sessions should have dynamic - alive speakers.
- I felt we learned as much from each other as we did from the course. It was excellent and the staff did make us all feel right at home. Very good job!
- Having been to a number of 3 day intensive sessions on a particular subject this was by far the best one. The work of planning and organization certainly paid off. Many of the speakers and especially Dr. Corrick and Wendell Cox provided both direction, leadership, and inspiration.
- Excellent program - should be repeated.
- Please use my comments in your program.
- A traveling road show in various parts of the country would be good. If there are time and dollar constraints, it could be condensed into a 1 day session.
- Very intense learning situation. Stimulating, but also draining. (Slept early and well 2nd night.)