

A Guidebook on New Software Adoption for Small Transit Agencies

Apr 14, 2021



Today's Webinar

Guidebook background



How to best use the Guidebook



Software adoption stumbling blocks



Questions and answers

About N-CATT



Mission to provide small-urban, rural and tribal transit agencies with practical, replicable resources that help them apply technological solutions and innovations

Technical assistance center funded through a cooperative agreement with the Federal Transit Administration (FTA)

Operated by the Community Transportation Association of America (CTAA)

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Why *this* topic

Selection and procurement of complex software is increasingly common

Expectations that multiple software platforms work together is more prevalent

Technical assistance is often difficult to find

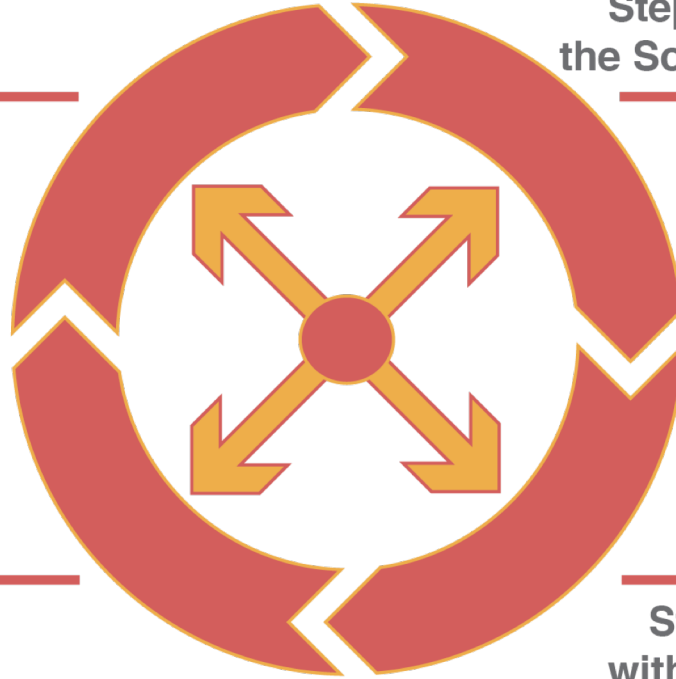


How to Best Use the Guidebook

Following the structure

**Step 1: Set the
Software Scope**

**Step 2: Collaborate with
the Software Stakeholders**



**Step 4: Support
the Software**

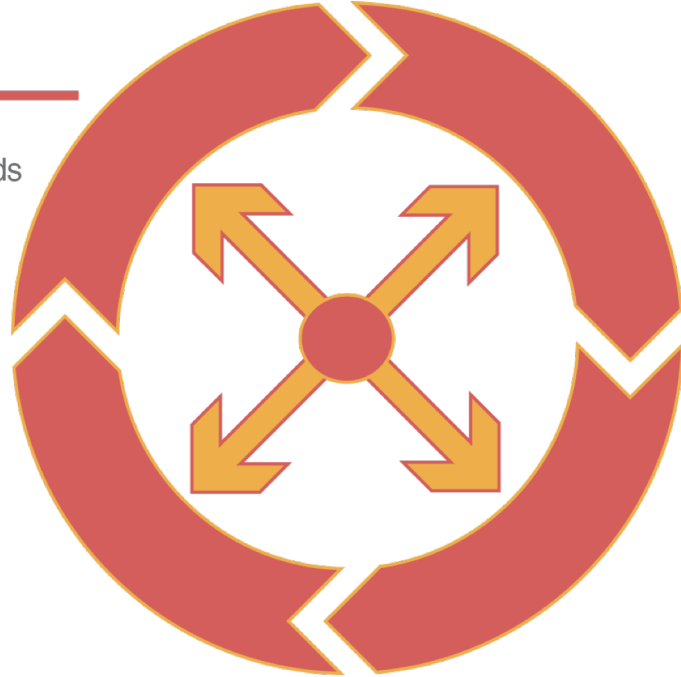
**Step 3: Move Forward
with a Software Product**

How to Best Use the Guidebook

Following the structure

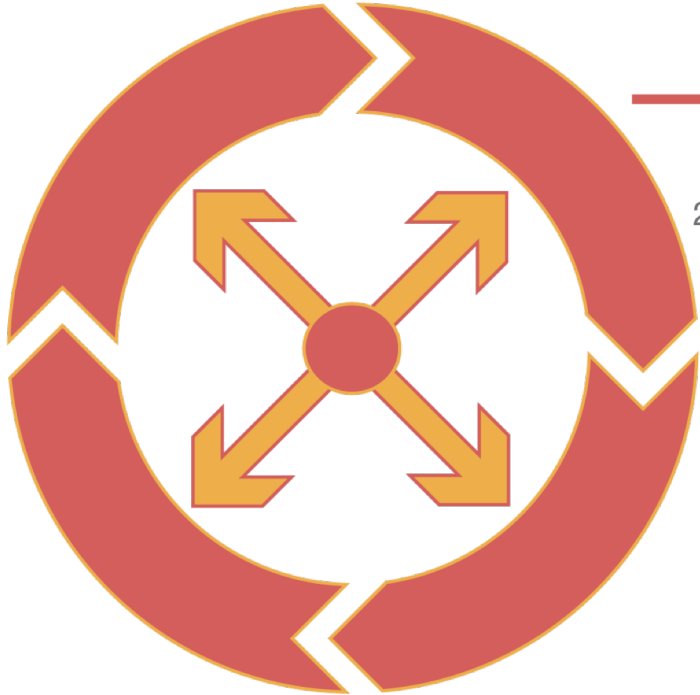
Step 1: Set the Software Scope

- 1a. Clarify the software's purpose
- 1b. Identify general software connectivity needs
- 1c. Anticipate resources



How to Best Use the Guidebook

Following the structure

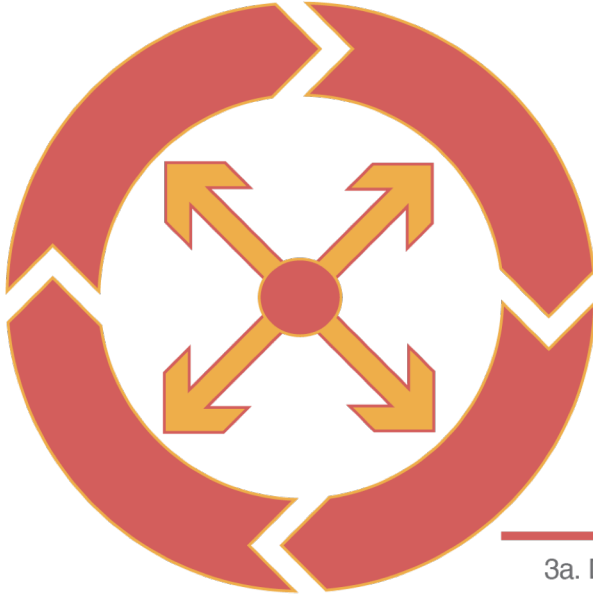


Step 2: Collaborate with the Software Stakeholders

- 2a. Create a stakeholder map
- 2b. Identify key topics for each stakeholder group
- 2c. Create a tailored information-gathering process to integrate stakeholder findings

How to Best Use the Guidebook

Following the structure



Step 3: Move Forward with a Software Product

- 3a. Determine What Type of Software Your Agency Needs
- 3b. Understand Your Available Software Choices
- 3c. Determine Whether to Obtain a SaaS System or a Licensed Software Product
 - 3d. Determine Your Core Requirements for the Software
 - 3e. Develop the Request for Proposals
- 3f. Evaluate the Proposals and Select the Most Appropriate Software Product
 - 3g. Begin the Software Implementation Process

How to Best Use the Guidebook

Following the structure



Step 4: Support the Software

- 4a. Plan for one-time software setup and training
- 4b. Prepare for ongoing support needs
- 4c. Consider additional support as the software scope expands

How to Best Use the Guidebook

Guidebook user types



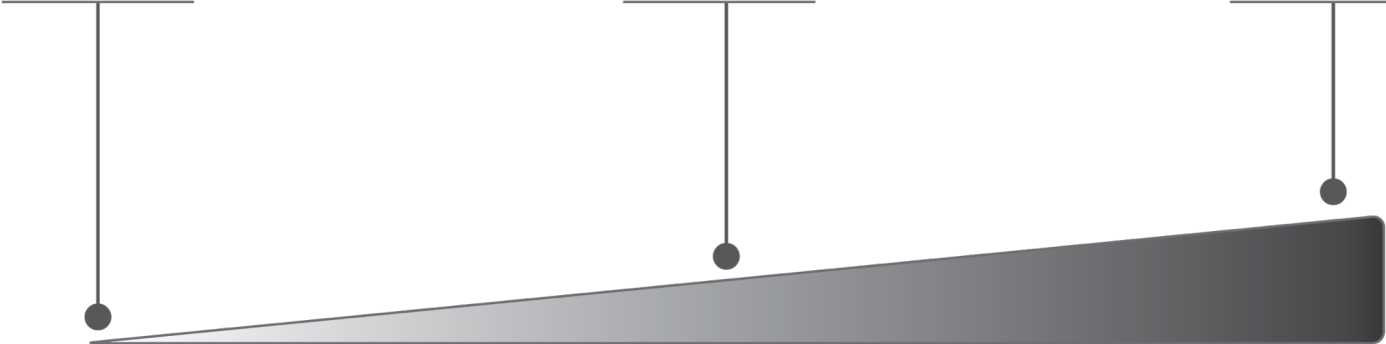
Totally unfamiliar with the topic



Somewhat familiar with the topic

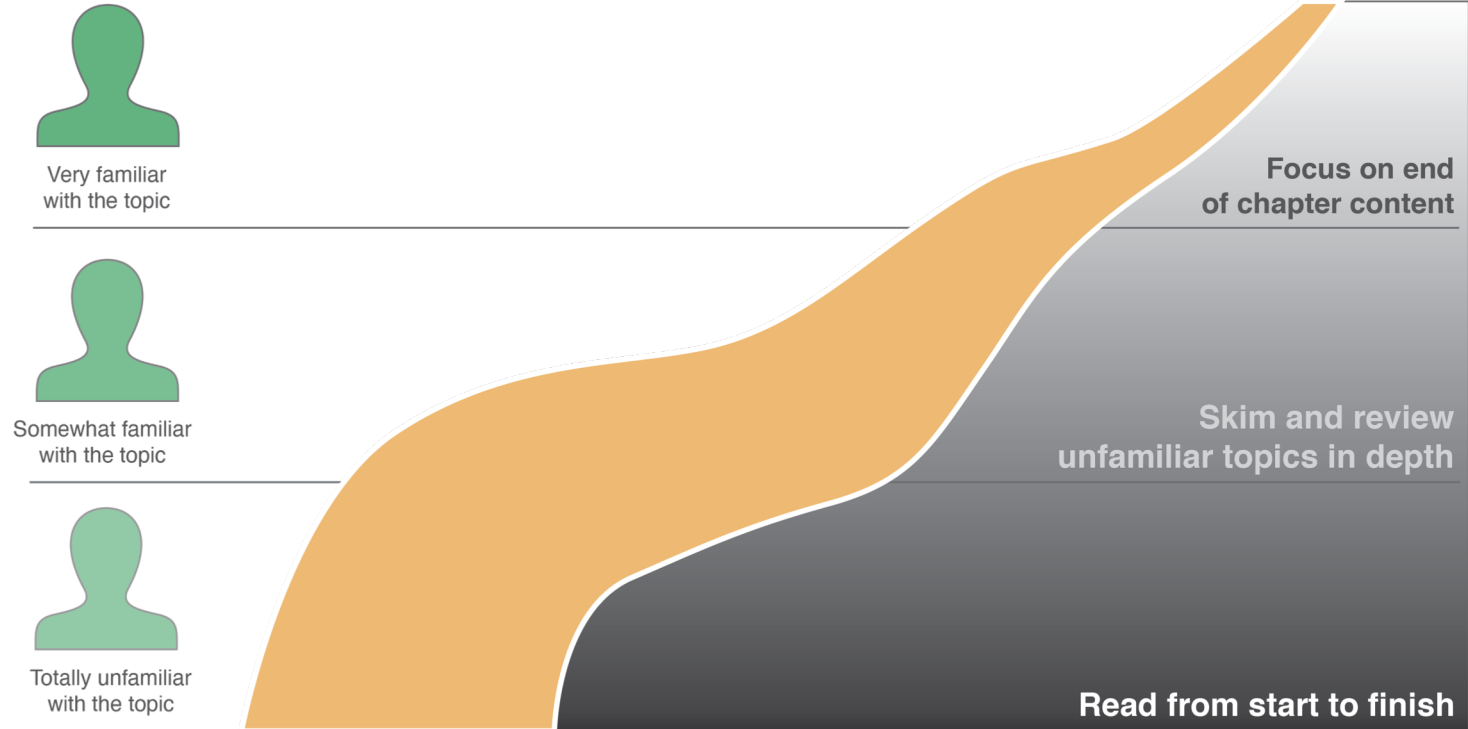


Very familiar with the topic



How to Best Use the Guidebook

Guidebook user path suggestions



How to Best Use the Guidebook

Key takeaways

Key Takeaways

- Clarify the software's purpose by connecting the transit agency's needs with the corresponding software type or types. For situations when it is unclear which software type is needed, apply the methods provided in the N-CATT white paper, a "Framework for Making Successful Technology Decisions," to explore an agency's technology portfolio more broadly.
- Identify general connectivity needs by listing all of the existing and future planned software that will have a relationship, even a loose one, with the new software type or types. The details of the connections are not needed during Step 1, only the understanding that some sort of connection should exist.
- Anticipate resources to apply to software adoption by creating an inventory of all an agency's potential resources, within the agency and from partner organizations.

Chapter/Step 1

Chapter/Step 2

Key Takeaways

- Create a stakeholder map by listing the managers and procurers, users, and influencers of the new software, including the organizations and known roles/individuals at the organizations. Hold brainstorming sessions with colleagues or partners to fill the gaps if some contacts are missing initially.
- Identify key topics for each stakeholder group by reviewing Steps 1, 3, and 4 and pinpointing which topics would be of most importance to each group.
- Create a tailored information-gathering process, and integrate stakeholder findings back into Steps 1, 3, and 4 to close the loop between information gathering and decision-making.

How to Best Use the Guidebook

Illustrative projects

Illustrative Project



LYNX is the transit agency for central Florida, serving counties including Orange, Seminole, and Osceola as well as limited service to Polk County. Orlando is included in the LYNX service area (estimated population of 287,442), as are municipalities such as Apopka (estimated population of 53,447), Oviedo (estimated population of 41,860), Sanford (estimated population of 61,448), and St. Cloud (estimated population of 54,579).¹⁰ LYNX has a unique story behind a number of its software platforms, from the standpoint of connectivity between the platforms as well as innovative ways of anticipating resources. LYNX has platforms that support trip planning, trip booking/scheduling, and trip payment.

The first app made available to the public, in March 2016, is an online trip booking platform called **WebAccess** for LYNX's Americans with Disabilities Act (ADA) paratransit service, **Access LYNX**. One online booking platform supports central Florida users of both the ADA paratransit service and the Florida-based **Transportation Disadvantaged** program, a "coordinated state-wide effort which groups riders together for a shared ride service. Transportation services are available in all 67 Florida counties for those who are eligible and have no access to transportation. Federal, State and Local agencies join together to provide necessary transportation to medical

¹⁰United States Census Bureau. Quick Facts. Available at: <https://www.census.gov/quickfacts/> as of February 10, 2021.

INTRODUCING THE NEW LYNX PAWPASS MOBILE PAY APP!

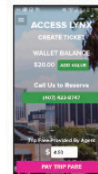
HOW TO GET STARTED:



1. Download PawPass in App Store or Google Play.
2. Create account.
3. Enter ACCESS LYNX ID to request approval.
4. Register credit or debit card. Add value to your virtual wallet.
5. Select "ACCESS LYNX" to purchase fare.



6. Enter fare amount for trip.
7. Select fare for trip.
8. Show driver active ticket.



HOP ON THE BUS AND ENJOY YOUR RIDE!

Customers also may access their accounts through golynx.com/trippapps or lynxpawpass.com to conduct self-service transactions.

How to Best Use the Guidebook Worksheets

Step 2: Collaborate with the Software Stakeholders

2a. Create a Stakeholder Map

Note: A stakeholder map can be a list of a graphical sketch that identifies connections (e.g., cases where the "procurer/manager" stakeholders are the same as the "user" stakeholders). Feel free to sketch on a separate sheet of paper if that is preferred to the list option below.

11. List the "manager and procurer" stakeholders. Include as much detail as you have available such as the name of the individual, their role or title, and the affiliated organization.

12. For the "user" stakeholders, first list the user groups for category identification (e.g., members of the public, agency organizational departments, and others). Then, provide any additional details you have available (e.g., specific members of the public such as app users with visual impairments, specific staff members within the agency's organizational departments, and others).

13. List the "influencer" stakeholders. Include as much detail as you have available such as the name of the individual, their role or title, and the affiliated organization.

2b. Identify Key Topics for Each Stakeholder Group

14. List the key topics for the various "manager and procurer" stakeholders.

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19. Describe the planned meetings and events that would take place for the "influencer" stakeholders. Elaborate on how the findings from the events would be integrated into the software adoption process during Steps 3 and 4 (potentially Step 1 also, if applicable).

Step 3: Move Forward with a Software Product

3a. Determine What Type of Software Your Agency Needs

20. Add any additional detail not already included in item 2.

3b. Understand Your Available Software Choices

21. What commercial off-the-shelf software (COTS) products are available that match the software type, or software types, that your agency needs? List the software companies and their products that seem to be a good fit.

3c. Determine Whether to Obtain a SaaS System or a Licensed Software Product

Note: Refer to "Software Product Purchasing Options" for guidance.

22. Does your agency prefer to have a SaaS system or a licensed software product?

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Software Adoption Stumbling Blocks

Stakeholder Input = Optional Task

Common Misconception:

If the person/group in charge of selection/procurement understands what is needed, they can handle it.

Course Correction:

Spending time on stakeholder collaboration will increase the likelihood that the software is used and appreciated.

How the Guidebook Can Help:

Chapter 2 describes the potential stakeholder types along with how to gain and incorporate input.



Software Adoption Stumbling Blocks

Software Adoption = Selection / Procurement



Common Misconception:

Once we select/procure the software, job (mostly) done.

Course Correction:

Early work will help clarify the software scope and stakeholder needs. Later work will help with set-up, maintenance, and updates.

How the Guidebook Can Help:

Each chapter explains these topics for the full process.

Software Adoption Stumbling Blocks

Muddling Through

Common Misconception:

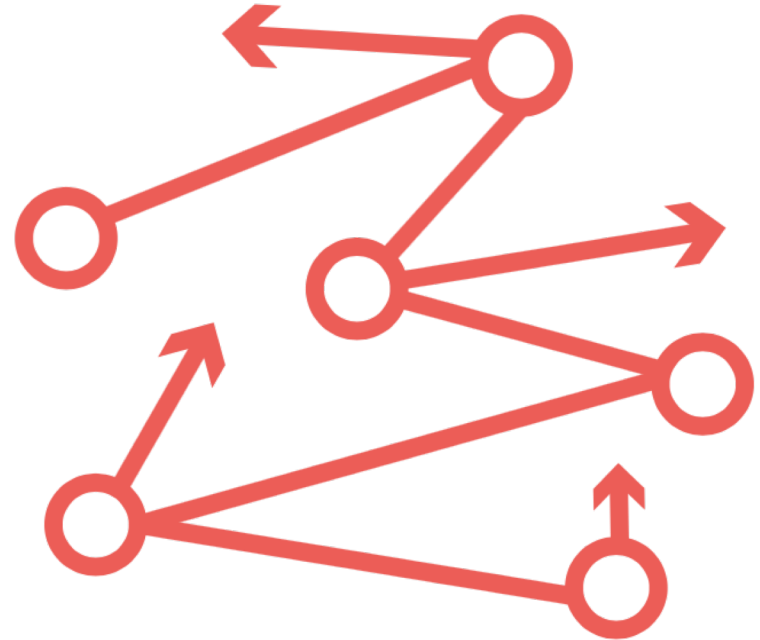
We'll figure it out as we go.

Course Correction:

It helps to be aware of what you don't know early on, and get the answers before there is a software commitment.

How the Guidebook Can Help:

The thoroughness of the Guidebook will help you identify critical unknowns.



Questions and Answers



Stay in Touch



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