

# Route Optimization Initiative

*New System. New Routes. New Way.*

## CASE STUDY



JACKSONVILLE  
TRANSPORTATION  
AUTHORITY



Route Optimization Initiative

# CASE STUDY

---

## TABLE OF CONTENTS

Abstract	1
Situation Overview	2
The Perfect Storm	3
Breaking Down Silos	4
The Anatomy of the ROI	6
Action Jaxsons	8
Launch Day Playbook	10
Mission Accomplished	12
Lessons Learned	13



# ABSTRACT

The Jacksonville Transportation Authority (JTA) was established in 1955 as the Jacksonville Expressway Authority. It officially became the JTA in 1971, when the expressway authority merged with several private bus companies. From the onset, the JTA has played a critical role in Jacksonville's growth and economic development. Jacksonville, named after America's 7th U.S. president, Andrew Jackson, has the largest population in Florida. The city also has the largest land mass in the country with a total of 874 square miles. The JTA builds roads and bridges and provides public transit to a vast area of more than 500 neighborhoods that includes Downtown Jacksonville, the Northside, Westside, and Southside communities, and the Jacksonville Beaches. While the military is the largest employer in Jacksonville contributing about \$6 billion annually to the economy, the Port of Jacksonville and four Fortune 500 companies are also major economic contributors of jobs and dollars to the region. Add to that backdrop the tourism industry and institutions of higher learning such as the University of North Florida, Jacksonville University, Edward Waters College and Florida State College at Jacksonville.

As cities throughout America began to regain their footing after the worst recession in modern history, the potential for the JTA to take public transportation to the next level, attract new customers, and improve the experience for existing ones was ripe. Jacksonville, like many southern cities that saw rapid growth during the last half of the century, was built largely around

auto-oriented development. Low-density suburban development, coupled with dispersed employment centers, had major consequences: a struggling downtown, increasingly congested roadways with few options for expansion, and an ineffective transit system that prevented disadvantaged residents in lower income areas from accessing jobs.

The years of economic recovery offered a unique opportunity to cities like Jacksonville. The boom in information technology captured the minds of a new generation of Millennials less interested in auto ownership and more interested in living in an active city with cool urban neighborhoods and access to public transportation options.

Cities began to increasingly see public transit as a key economic development strategy. Jacksonville had to change to compete, but 21st Century commuting patterns and lifestyles strained an aging system. Long, circuitous routes and lengthy waits for a bus of up to an hour or 90 minutes would not attract new riders and certainly would not be attractive to a younger generation of potential riders.

Under the leadership of a new CEO, JTA took a major step forward in developing a world class transit system by implementing the Route Optimization Initiative (ROI) in December 2014. It was an ambitious and courageous undertaking by a transit authority of any scope or size in North America.





## SITUATION OVERVIEW

The year 2013 would become the year when vision collided with an intense focus on implementing change. The transformation started in October 2012, when the JTA Board of Directors hired Nathaniel P. Ford Sr. to be the Authority's new Chief Executive Officer. Ford, the former CEO of the San Francisco Municipal Transportation Agency (SFMTA) and the Metropolitan Atlanta Rapid Transit Authority (MARTA), welcomed the opportunity to join a midsize organization with amazing potential for growth and innovation. He likened the experience to buying a house on a solid foundation that had ample room for expansion and customization. Ford began his career at the JTA by doing his due diligence. He conducted his own top-to-bottom review of the organization before he officially moved into the C-suite in December 2012. Ford also spent time with the outgoing CEO, met with Board members individually and collectively, and talked with employees to assess the Authority's internal and external performance.

Prior to hiring Ford, the Board had launched its own assessment of the JTA by hiring an independent consultant, TransTech, to review the overall operations.

The findings of the assessments, both TransTech and CEO Ford's own assessment, revealed there were several areas that needed improvement ranging from outdated technology to staffing issues, customer service, internal and external communications and a standard on-time performance measurement of bus operations to accurately determine how the system was doing.

“The economic vitality of Jacksonville and Northeast Florida depends on a robust, world-class transportation network. We immediately recognized that while the JTA's road and highway programs met this standard, our transit network did not. ROI was an aggressive strategy to fix this. Our community deserved better today, not tomorrow.”

- Nathaniel P. Ford, Sr., CEO



# THE PERFECT STORM

The assessment primed the JTA Board for change and they trusted Ford to be the change agent the Authority needed. Ford, in turn, stoked the Board's confidence by being transparent about all aspects of the changes his administration would propose that paved the road for the ROI implementation.

Known as a visionary and strategic planner, Ford first made sure he had the right people in place to do the work that would be required by restructuring his Executive Leadership Team (ELT). The JTA hired C. Robinson Associates, which specializes in organizational development, to lead the restructuring. Internal Candidates were asked to conduct self-assessments to determine if they possessed the characteristics that JTA leaders needed to transform the organization from good to great.

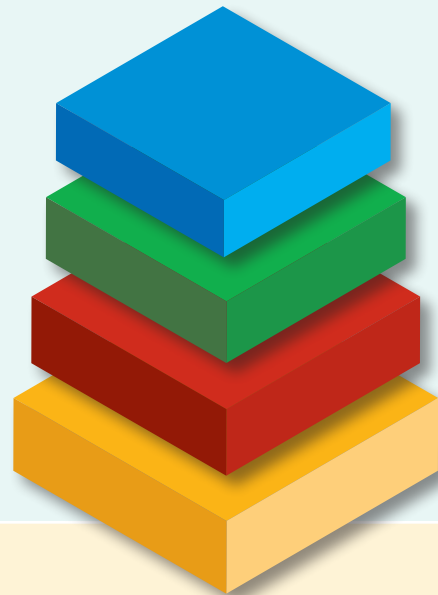
The traits were:

- Good communicator
- Change agent
- Critical thinker
- High energy
- Accountable
- Engaged
- Team player
- Inspirational
- Customer focused
- Courageous
- Innovative
- Strategic thinker



Encouraging candidates to make an introspective evaluation before they applied for a posted position added dignity to the downsizing. The process also brought out people who were excited and open-minded about the challenge ahead, even though no one had an idea then that they ultimately would completely redesign the JTA's route transit system for the first time in 30 years.

By May 2013, five months to the day after Ford came to the Authority, his administration accomplished its first major feat by reducing the layers of management to facilitate clearer lines of communication and greater accountability among his leadership team. The restructuring also changed the culture at the JTA by promoting collaboration between departments and managers. Strategic system plans were coordinated with route planning, engineers and planners worked together, managers owned projects from conception to completion, and an External Affairs Department was created to enhance public outreach and the JTA brand.



“Outstanding CEO leadership and assembling the right executive team with an unparalleled commitment to provide excellent transportation solutions for the Northeast Florida region made the route optimization initiative successful.”

- Conchita Robinson, Consultant

# BREAKING DOWN SILOS

With a clean slate of executives and managers appropriately seated, the new administration made certain everyone on board shared the JTA's goals to:

- Improve customer service
- Grow ridership among choice customers including Millennials, Baby Boomers and retirees; and
- Position the JTA to be a regional transportation provider in Northeast Florida

Accomplishing any of those goals required an objective assessment of how the Authority performed its largest, most visible role: providing reliable and effective bus service to customers - 87 percent of whom rode the system because they had no other means of transportation to get to work, school or health care.

JTA was already moving forward toward implementing the First Coast Flyer Bus Rapid Transit (BRT) program. Moreover, a new Northeast Florida Regional Transportation Commission had been created with JTA's active involvement and support, making imminent a conversation about JTA's role in a regional transit system. Recognizing the critical path ahead, the CEO asked his new Vice President of Long Range

Planning and System Development, Brad Thoburn, to evaluate the effectiveness of the local bus service.

An objective assessment of the current system showed JTA bus service was not attracting the number of customers it could, particularly given the level of investment.

Certain issues were readily evident: For the past 30 years, incremental changes to the system ignored major shifts in employment and populations centers. While responding to individual customer concerns, the system lost its focus on the larger community. Thirty years of tweaks had spread JTA resources and left Jacksonville citizens with long circuitous routes and unacceptable waits between buses. JTA needed to make major changes to the system.

While some issues were obvious, JTA needed to more deeply assess the system and restructure routes prior to launching the First Coast Flyer (BRT) to support JTA's case to be the lead regional transit provider. With strong Board support and CEO directive, JTA's planning staff began down the path of what would become the most comprehensive route overhaul in the Authority's recent history.



*In November 2014, the JTA broke ground on the First Coast Flyer (BRT) Downtown Corridor. US Department of Transportation Secretary Anthony Foxx attended the kickoff of the high-quality, high-capacity transit service in Jacksonville.*



## Testing the new Framework

As the need loomed for a major route restructure, the CEO raised fundamental concerns about day-to-day operations relating to system reliability and on-time performance. Analyzing the JTA's on-time performance was difficult because no standard measurement existed to determine how often buses arrived or departed within five minutes of the scheduled time.

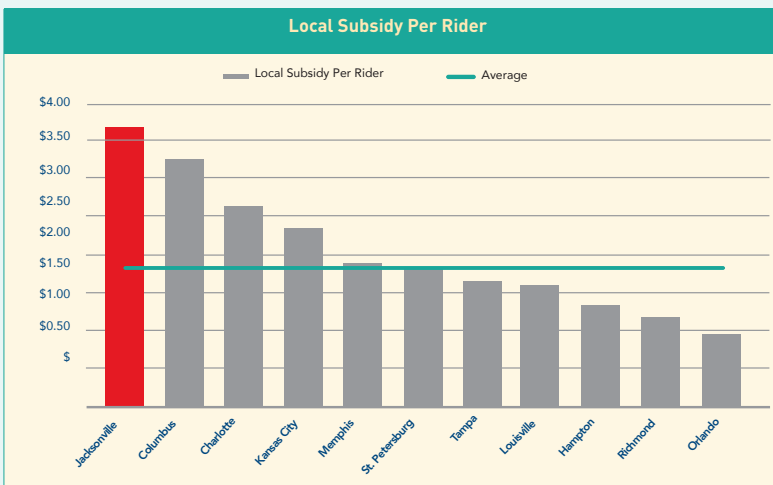
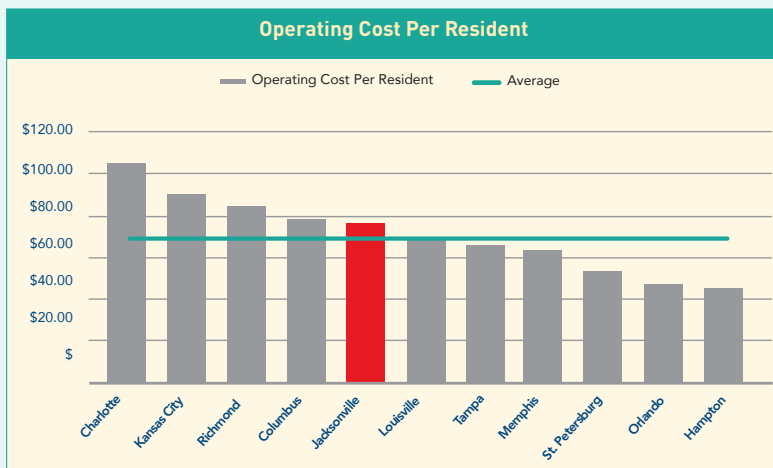
To correct the problem, Ford's team launched an initiative the Authority branded On-time Transit Operations or "OTTO" in October 2013. OTTO not only addressed the fundamental operating issue of service reliability, it tested the framework of the new organizational structure of managing without silos.

While the core work of on-time performance would be led by JTA's new vice president of Transit Operations, Lisa Darnall, its success depended on strong intragency coordination. The administration began by assigning route owners to 12 of the JTA's lowest performing routes. Some of the owners had never worked in Operations before. They analyzed factors that prevented buses from departing and

arriving on time and identified solutions the entire team could benefit from. Conversely, when a route performed well, that information was also shared. The collaborative system fostered open communications and a shared purpose and mission among JTA staff. It also made the administration painfully aware that its on-time performance was only 60 percent, almost 20 percentage points below industry standard.

*“Decades of tweaks and minor adjustments failed to address the changing needs of our customers and resulted in significant inefficiencies. ROI gave the planning team a chance to develop a system that really maximized JTA's positive impact on the Jacksonville community.”*

**- Brad Thoburn, VP, System Planning**



# THE ANATOMY OF THE ROI

While OTTO helped improve bus departure and arrival times, the JTA planning team led by Carl Weckenmann, Senior Manager of System Planning, dug deep into assessing the route structure to develop the framework for a completely new system.

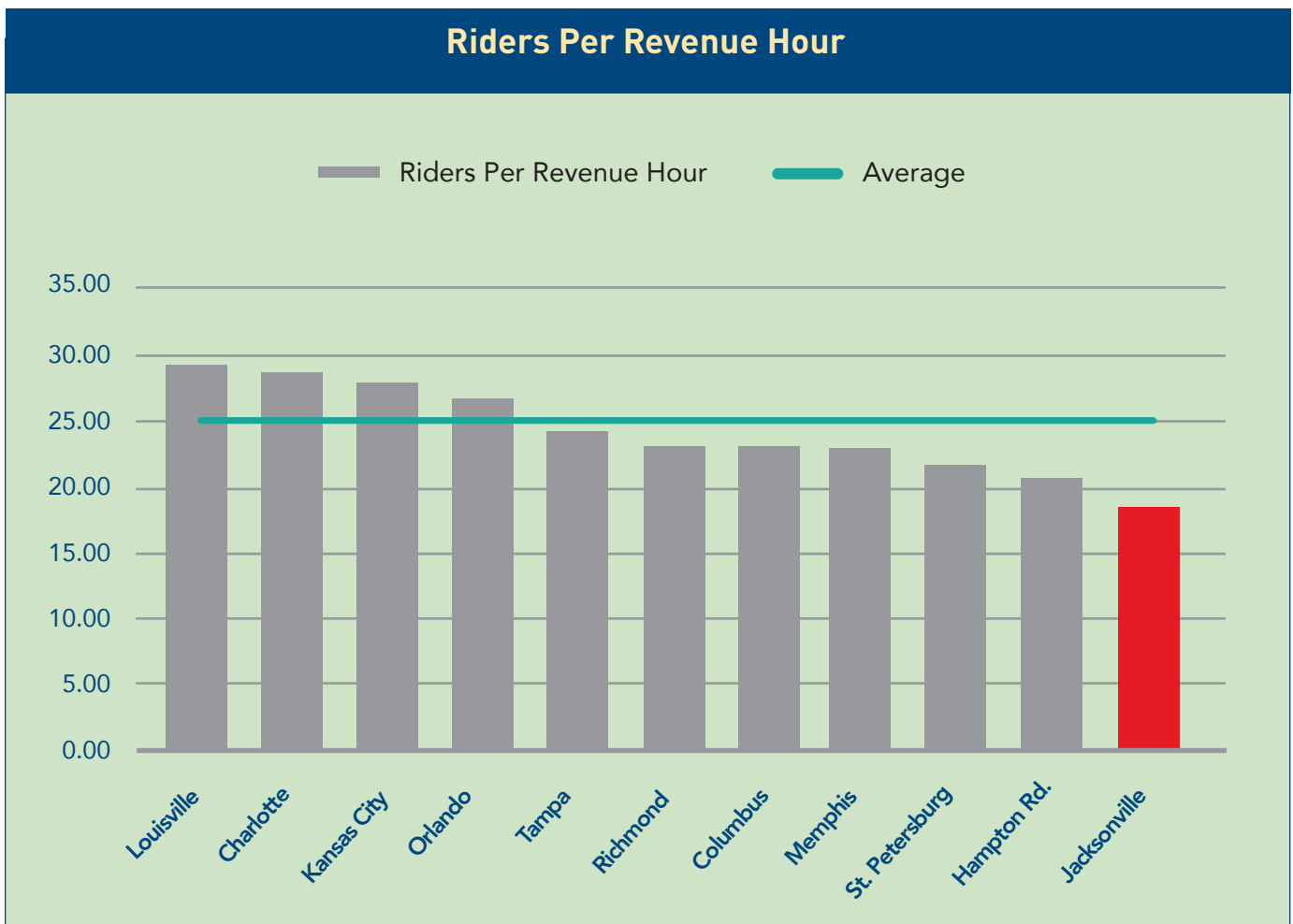
To succeed, it was clear that any new system plan needed a strong case to necessitate the changes backed by sound data to support it. Fortunately, JTA's planning staff had access to a recent origin and destination study that tracked the patterns of customers using the system. In addition, new demographic data from the 2010 Census and several years of customer satisfaction surveys provided more background data needed to develop a sound plan.

JTA engaged the consulting team of England, Thims and Miller and Parsons Brinckerhoff to conduct comprehensive operational and peer system analyses. RS&H was hired to assist with program implementation.

What was learned from the more in depth review was truly revealing. JTA leadership already knew the Authority lagged in drawing new customers; however, the analysis went beyond confirming their suspicions.

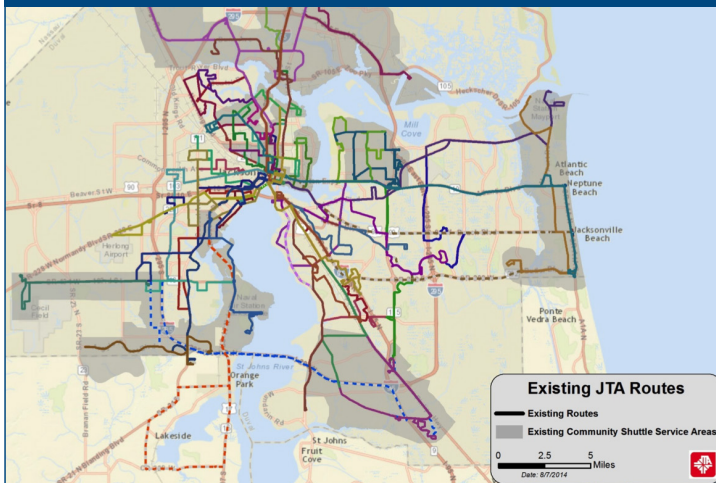
Some of the key findings were:

- JTA's investment in transit (measured in transit investment per capita) was comparable to its peers as was its service efficiency (measured as cost per vehicle mile), but JTA was last among its peers in riders per revenue mile - a key indicator in determining service effectiveness.
- The JTA system as a whole averaged less than 20 riders per passenger mile - which is often an indicator that the route should be discontinued.
- JTA's best performing routes did not keep up with the average routes of top performing peers.

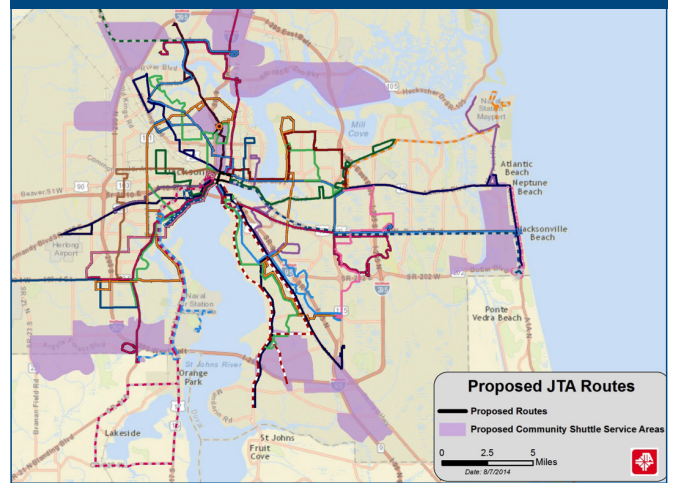




## Existing Routes



## Proposed Routes



### JTA's local bus service had major flaws that led to this performance:

- Service frequency was extremely poor with only two routes running at 30 minute intervals
- Service span catered to a 9 to 5 workforce when people needed early, late and weekend service to get to and from work
- Mainline routes had long waits and exhaustive rides
- Poor coordination between routes often meant that routes often competed with each other instead of complementing them
- Poor coordination also resulted in inconvenient transfers with additionally long waits

### JTA's customers had some useful insights as well:

- Customers frequently complained that all routes forced them Downtown even if they were trying to get to another location in the same section of the city
- Many riders wished they had access to technology that would tell them when the next bus would arrive

- Many buses were practically empty while others had standing room only, meaning JTA was doing a poor job of allocating resources

Armed with this information, the planning team proceeded to develop the ROI plan. They were given a unique but daunting opportunity. The Executive Leadership Team asked them to build a system from scratch and develop a plan to implement.

The team drafted a framework for a new system, built the routes and designed schedules to implement the new framework. At each step, the public, key stakeholders, and the ELT gave input to help refine the plan.

While the framework was under development, a critical issue faced the team: Should the new system be phased-in gradually or implemented at one time? After much consideration and discussion, a decision was made to make a wholesale change all at once; to do anything less would be tantamount to another piecemeal change and implementation of subsequent phases could be delayed.



“Our No. 1 goal is to provide exceptional customer service, not only through the design of our system, but through new technologies for our customers.”

- Lisa Darnall, VP, Transit Operations

## ACTION JAXSONS

During the 18-month period from the initial system assessment to the launch of ROI, everyone at the JTA had a role to play and the entire staff knew it was the CEO's top priority. A consultant, C Robinson Associates, Inc., was hired to manage and oversee the process and to provide the CEO with regular updates on the progress.

Ford kept the plan transparent and on the front burner of the JTA Board, stakeholders, elected officials, business and civic groups and employees by utilizing every opportunity to talk about ROI, explain what it would do and how it fit into the JTA's larger plan to bring bus rapid transit and compressed natural gas buses to Jacksonville. He also used those occasions to listen and hear concerns about JTA's service and scheduling issues to find ways the ROI could help address them. Members of the ELT gave similar presentations to their colleagues in organizations such as TEAMFL, Leadership Jacksonville, United Way and Rotary clubs.

Meanwhile, the JTA's External Affairs team, led by Vice President Jacquie Gibbs, held an unprecedented

number of public hearings and community meetings to educate and inform the public about the changes underway and to receive their input about the impact the changes might have. Using maps of the bus system that showed proposed routes, the JTA was able to demonstrate that the changes were made based on cost per passenger, cost per mile, peak boarding times and other data. The outreach effort gained strong support from key political, business and community leaders who understood the value of an efficient public transit system. Ford's background and experience in other major systems was critical in gaining support as well.

At the same time, the JTA launched the Real-Time Passenger Information Initiative (RTPI) that provided customers with information on when the next bus would arrive so they could better plan their trips. The overwhelming success of the RTPI pilot, based on feedback from focus groups, underscored the need to implement the RTPI system wide. However, the benefit of tracking the next bus would pale in comparison if customers had to endure unnecessarily long rides once they boarded.



## 94-Day Countdown

By August 2014, Ford's administration had completed the finishing touches on the route restructuring plans and presented it to the JTA Board for a vote. Approval was unanimous, thanks to the gargantuan job the CEO and ELT did of keeping Board members involved at every stage of the process - from early assessments of the JTA's performance, to the peer analysis, the plan itself, the internal and external communications strategy, community outreach and the game plan for Launch Day on December 1, 2014.

The administration was meticulous in its planning, knowing that nothing could go wrong with such a mammoth initiative that was moving at the speed of light rail.

Members of the management team look back on the trips that took them to Alabama to meet with the company that produced the JTA's new bus stop signage to ensure that the signs were on time and within budget, and say they would do it all again. They also welcomed the joint meetings they had with presidents and CEOs of technology companies to make sure everyone was knowledgeable about the entire ROI process, not just the role they would play.

Recognizing that training operators to drive the new routes was as important as educating the public about how to ride the new system, the JTA employed an innovative training program. Retired Operations team members were brought in who knew the history of the system, had credibility with employees

and possessed the institutional knowledge the new leadership team might not have had to train staff. The JTA also made sure all demographics were reflected in the trainers including the elderly, young people, Blacks and Hispanics and people with special needs.

Meanwhile, well prepared outreach teams hit the streets of Jacksonville in a coordinated blitz to educate and inform customers and stakeholders about the upcoming system changes.

As the countdown to launch day neared, Ford's administration also collaborated with law enforcement to notify them of stops where JTA hours of operation were extending and made sure the offices of local elected officials received regular updates to share with constituents.

“Our strategy for informing and educating the public and customer service representatives about the Route Optimization Initiative was simple. Tell them again, and again, and again. And then tell them some more.”

- Jacquie Gibbs, VP, External Affairs



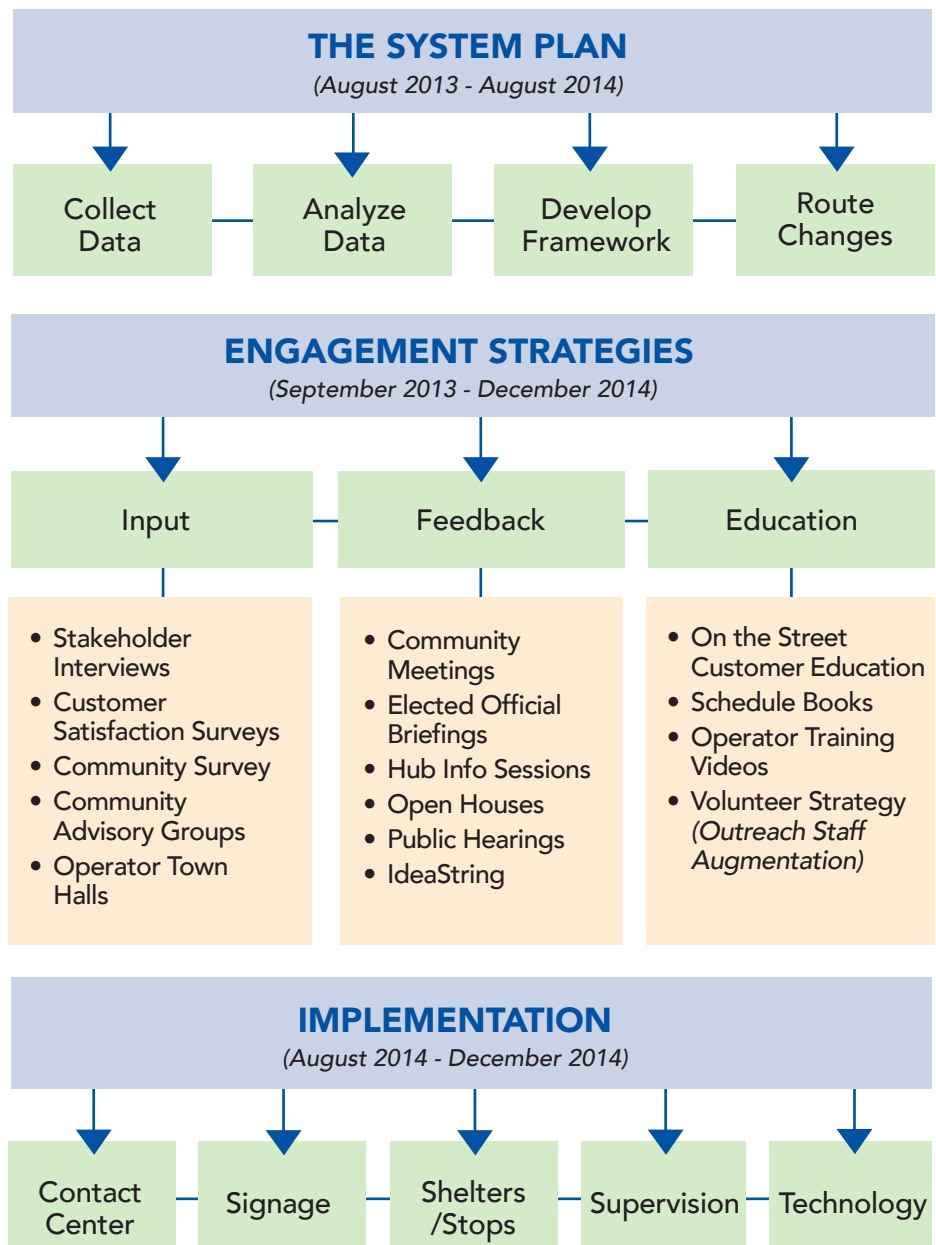


# LAUNCH DAY PLAYBOOK

Like an army preparing for a stealth operation that had to be swift and precise, the JTA readied its troops for the December 1, 2014 launch. The big day, by no accident, coincided with the move of the JTA headquarters from its Myrtle Street campus to a temporary location in Downtown Jacksonville, a move necessary to prepare for a permanent relocation to the future Jacksonville Regional Transportation Center (JRTC).

If anyone questioned the impact of the transformational leadership of 2013, they didn't anymore. The traits Ford sought in JTA leaders would reverberate with the ELT and department managers tasked with running the Authority's day-to-day operations while simultaneously overhauling the decades old system. Characteristics like high-energy, engaged, customer focused, innovative and strategic thinker took on new meaning.

Perhaps, that explains the camaraderie JTA staff exhibited when they took to their trucks, two-by-two, in the wee hours of December 1 to remove bags that hid nearly 2,900 new bus stop signs from public view until buses began rolling at the crack of dawn. Or the excitement and sense of pride that permeated from the JTA boardroom turned Command Central, where the CEO and ELT received periodic updates throughout Day One on the progress of the launch.



(August 2014 - December 2014)



## Executive Steering Committee

### Intra-Agency Coordinating Committee (Cross Functional)

Major Tasks, Primary & Supporting Owners, Required Completion Dates & Budget.

Audience Matrix, Media Plan, Outreach Team, Customized Tools and Collateral

- Operator Training  
(Classroom, Training Videos and On the Road)
- Authority-wide Training
- Town Hall Meetings
- Staff Rally
- CEO Video Messages
- Restructured Customer Service & Operations to Improve Service Management & Delivery

- Service Delivery Managers
- Customer Experience Coordinators
- New Operator Uniforms
- Bus Branding

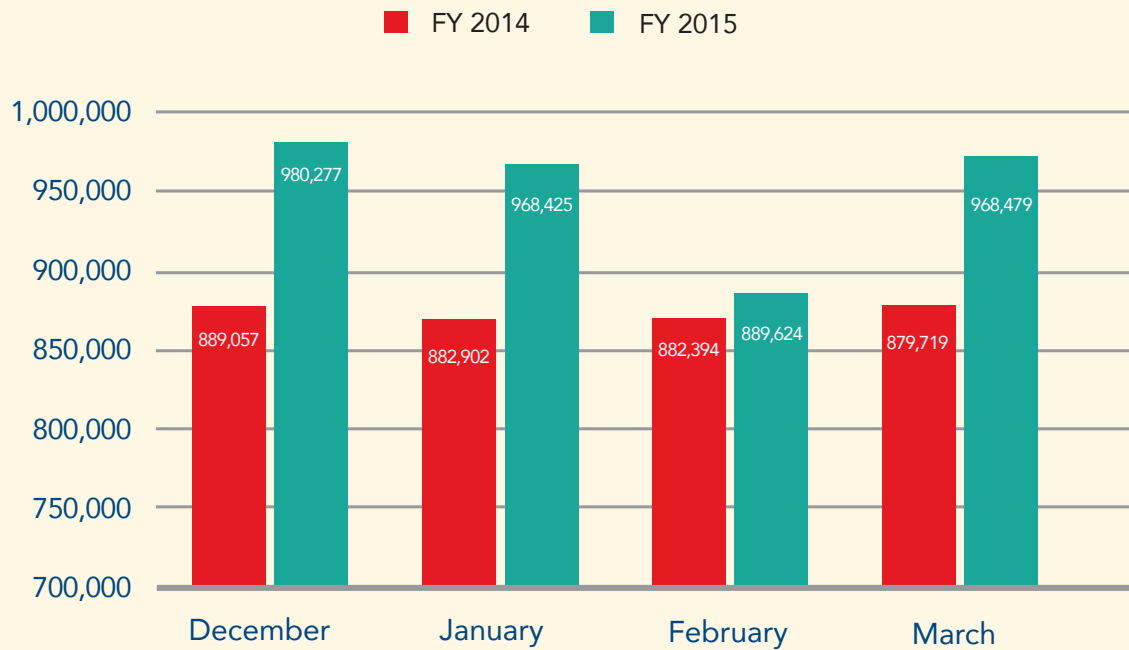
- 128 ADA Compliant New Bus Stops
- Late Night Service
- Tabletop Exercise
- Installation of 2,900 New Signs
- New Bus Stops & Pads
- JSO Partnership

- System-Wide Deployment of Real-Time Passenger Information
- Technology Vendor Coordination
- TransPortal Trip Planner
- New Computerized Scheduling
- Central Recording System

Pre Launch Activities:	Launch Day:	Post Launch Day:
Last Ride Campaign, Shelter Maps Installation, Sign Bag Removal and Upload CRS Database Community outreach	Command Center, Feet on the Ground Teams	Data Collection, Analysis, Reporting, Operator Feedback Sessions



## Total Ridership



## NEW SYSTEM. NEW ROUTES. NEW WAY. MISSION ACCOMPLISHED

If OTTO was a taste of what the JTA could become with improved service, the Route Optimization Initiative was a buffet with a smorgasbord of enhancements that totally overhauled the JTA's transit system. Since the December 2014 launch, ridership has grown by six percent. The JTA's ultimate goal is to increase ridership to include choice customers.

The comprehensive Route Optimization Initiative has already improved customer service and positioned the JTA to be a regional transportation leader in Northeast Florida. At a one-time cost of \$2.1 million in operating and capital funds, the ROI also enabled the JTA to:

- Remove 30 percent of bus stops to reduce travel time between stops
- Install 128 new ADA compliant stops
- Increase the number of routes with 30-minute frequency from 2 to 20
- Install 10 routes with 15-minute frequency, a first in JTA's history
- Double routes operating after 11 p.m. from 11 to 22
- Increase routes operating after midnight from 3 to 16
- Speed up weekend service to run more frequently

- Increase route supervision, system branding, safety and security and adopted new protocol for naming routes
- Adopt a new, more professional dress code for operators
- Install nearly 2,900 new bus stop signs
- Implement the Real-Time Passenger Information system-wide
- Solidify concept of teamwork among JTA staff





# ROI BEST PRACTICES & LESSONS LEARNED



## **Think Big. Be Bold. Be Courageous.**

- Launch the initiative in one phase. A gradual phase-in can increase confusion and delay system-wide implementation.
- Consider a total system transformation by including in your plan enhanced branding, shelters and amenities, route supervision, customer service approach, route names, technology such as Next Bus, and safety and security.

## **Prepare for Push Back From Customers & Stakeholders**

- Big changes are typically met with resistance.
- Governing boards and elected officials will back you if you define what you are doing up front.
- Support education with performance data and peer analysis.
- Data and sound planning aligned with well-defined goals and objectives will help prevent appeasing the squeaky wheel and diluting the plan.

## **Position Your Team**

- Clear the deck and make it understood this is the CEO's top priority.
- Executive level ownership and responsibility is critical.
- Develop a cross-functional leadership team to ensure all hands on deck and intragency coordination.

## **Make Operators & Supervisors a Key Resource**

- They know the system, the customer and will be your front line ambassadors to help develop and sell the plan.
- Post-launch operator workshops will help you develop system refinements quickly, address safety issues and respond to customer concerns.
- Get vendors, especially technology providers, on board by engaging their executives. They need to know how important this project is to the organization.

## **Commit to Marketing, Outreach & Education**

- Don't skimp on budget or activities; it can make or break your initiative.
- Be innovative with collateral and saturate the market until the plan is on top of customers' minds.
- Develop a dedicated part-time education and outreach team that includes retired operators and supervisors.

## **Sweat the Small Stuff**

- Plan for worst case scenarios.
- Determine the best launch time based on ridership trends, holidays, elections, weather, collective bargaining agreements, etc.
- The "best value" bid may be better than the low bid since time and quality are critical.



JACKSONVILLE  
TRANSPORTATION  
AUTHORITY

121 W. Forsyth Street, Suite 200  
Jacksonville, Florida 32202  
Office: (904) 630.3181  
[www.jtafla.com](http://www.jtafla.com)

The ROI Case Study was strategically developed and designed by:  
**Jones Worley Communications**  
[www.jonesworley.com](http://www.jonesworley.com)