



Executive Committee

Information Item IV-B

September 24, 2020

**Framework for Transit Equity:
Customer Outreach, Communications and
Engagement**

Washington Metropolitan Area Transit Authority
Board Action/Information Summary

Action Information

MEAD Number:
202204

Resolution:
 Yes No

TITLE:

Customer Communications, Outreach and Engagement

PRESENTATION SUMMARY:

Overview of customer communications and outreach methods currently employed by Metro to engage customers and communities around major projects, policy decisions, service and fares, and other vital transit information.

PURPOSE:

Provide information about Metro's existing customer engagement framework to inform the Board's ongoing discussions around transit equity.

DESCRIPTION:

This presentation outlines the various methods employed by Metro to communicate with customers and describes levels of engagement, with a focus on:

- Customer Service Contact Center
- Digital engagement via wmata.com and social media channels
- Metro's Public Participation Plan

Based on the current framework for engagement, the presentation lays out a few topics for ongoing discussion related to:

- Community engagement
- Accessibility of communications
- Title VI and transportation equity
- Post-COVID adaptations

Key Highlights:

- Metro engages customers through a variety of channels, including the Customer Service Contact Center, wmata.com, social media channels, surveys and focus groups, and through comprehensive communications plans surrounding all planned projects and policies as guided by Metro's Public Participation Plan (PPP).
- The Contact Center handled 630,000 contacts via phone, email, Twitter and live chat in 2019.

- Metro engages customers on social media and the Authority's website, which has 1.1 million visitors each month.
- Over the past 10 years, the Contact Center has seen a 41% decrease in telephone contact while emails increased by 45%. Since 2017, the new digital channels have experienced tremendous growth - Live Chat engagements have grown 180% and Twitter engagements by 10% over a three-year period.
- The PPP is part of Metro's Board-approved Title VI Program. It lays out the process and strategies to engage minority, low-income, and Limited English Proficient (LEP) populations on decisions ranging from service and fare changes to capital projects and planning studies.
- Since implementation of Metro's first PPP in 2015, more than 100 projects have followed the PPP - including 60 in the past three years - with thousands of engagement activities conducted to provide equitable outreach, gain community feedback, and inform customers about projects and policies.

Background and History:

Contact Center

The Customer Service (CSVC) Contact Center is a multi-channel customer communication operation composed of approximately 50 employees who engage customers and deliver responsive transit service and information through Live Chat, Twitter, email, written mail, and phone. The Center also runs Metro's Lost & Found operations.

The Contact Center has a unified management team that oversees four distinct units:

1. Customer Information (responds via phone)
2. Customer Relations (responds via email and phone)
3. Social Engagement (responds via Twitter/live chat)
4. Lost & Found (responds via email and phone)

The Contact Center handled 630,000 contacts via phone, email, Twitter, and live chat in 2019.

The Center's operation is augmented by an Integrated Voice Response (IVR) system that annually provides hundreds of thousands of telephone customers with self-serve transit information without ever speaking to a live agent. Customers using the IVR are most interested in basic transit fare/schedule information which is readily available to them by telephone.

Digital Channels

Metro provides vital information for the community on its website – wmata.com – which has 1.1 million visits each month as the primary gateway for information. The top reasons for visits to wmata.com are trip planning and real-time train arrivals. The Contact Center's live chat is also available via wmata.com.

Metro is also actively engaged with customers on social media channels, including YouTube, Facebook, Instagram, and Twitter. Those channels continue to grow with more than 5,600 YouTube followers (up 28% compared to last year), 19,000 Facebook followers (up 19%), 11,700 Instagram followers (up 167%), and 439,000 combined followers across four Twitter handles (up 2%).

The vast majority of Metrorail and Metrobus customers have smartphones. According to the 2018 bus passenger survey, 94% of bus customers have a smartphone. And a recent survey of Metrorail customers with registered SmarTrip cards found 95% have a smartphone. The predominant use of smartphones is also apparent in the use of mobile devices to access the Metro website - 65% of visits to wmata.com are using mobile devices and 35% using desktop computers.

Public Participation Plan

Metro has a Public Participation Plan (PPP) that details the process and strategies used to engage minority, low-income, and Limited English Proficient (LEP) populations on decisions ranging from service and fare changes to capital projects and planning studies. The PPP is a required element of Metro's Title VI Program, submitted to FTA as part of Metro's Title VI Program every three years, or as otherwise directed by FTA, pursuant to FTA Circular 4702.1B. The PPP outlines the methods Metro uses to reach people who speak 26 languages in the region and represent all racial and ethnic minorities in the communities we serve. In particular, the PPP follows Metro's Language Access Plan (which also is a part of Metro's Title VI Program), which identifies the top languages spoken in the area so that targeted communications and translations can be provided as needed.

The PPP was first approved by the Board in 2014, was updated and approved again in 2017 as part of WMATA's Title VI Program, and is now before the Board as part of the 2020 update to WMATA's Title VI Program.

In 2013 and 2014, as Metro undertook the creation of its first Public Participation Plan, an 18-month long "Speak Up! It's Your Ride" public outreach campaign was conducted to aid in the development of the plan. The campaign included 24 outreach events, the distribution of 4,000 postcards, a public survey, outreach and focus groups with community-based organizations (CBOs) to better understand how and where communities can best be reached. Speak Up! reached a representative sample of the area's population and Metro's ridership, collecting the communication and feedback preferences from 3,513 survey respondents, of which 69 percent were minorities, 28 percent were low-income, and 10 percent were LEP.

The PPP has grown over the past six years due to an increase in initiatives and capital projects. Metro applies the PPP framework to all Authority project communications and outreach efforts. The Obama Administration's FTA pointed to WMATA's comprehensive approach as a model plan that includes detailed guidelines for executing inclusive, consistent, collaborative, and responsive public outreach.

Customer Research

Engagement with customers is enhanced by targeted surveys of customers who are

impacted by planned projects or policy decisions, system-wide research, and focus groups. In total, the Office of Customer Research (RESR) team surveyed 74,231 customers in 2019.

To inform Metro's policy decisions and the development of products, services and communications that address the needs of the public, RESR surveys rail, bus and paratransit customers on a continuous basis. These rolling surveys include:

1. Customer Satisfaction Measurement Survey (3,104 respondents per year)
2. MetroAccess Customer Satisfaction Survey (1,596 respondents per year)
3. Customer Service Call Center Survey (12,636 respondents per year)

In addition to these long-term tracking surveys, RESR also conducts many ad hoc surveys to inform day-to-day business decisions that impact customers. These surveys are conducted online; however, in-person outreach teams use tablets and paper surveys to collect responses at events and in-system.

In 2019, these surveys included, but are not limited to:

- Surveys to inform the distribution of free shuttle buses for rail customers affected by the Summer 2019 Platform Improvement Project (5,617 respondents)
- Surveys to measure Metro's performance in mitigating the 2019 shutdown of stations south of National Airport (2,880 respondents)
- Surveys of Metrorail and Metrobus customers to inform the 2021 Budget process decision-making (15,959 respondents)
- Survey of VA residents who live near the Silver Line to inform the Silver Line Phase 2 launch (1,000 respondents)
- Survey of Metrorail and Metrobus riders to measure the incidence of verbal and physical harassment on Metro property (1,000 respondents)
- Survey of SmartBenefits customers to inform the design of the new SmartBenefits self-service portal (93 respondents)
- Survey of Metrorail customers to inform redesign plans for five stations: Archives, L'Enfant, Metro Center, McPherson Square, and Smithsonian (2,359 respondents)
- Surveys of Park & Ride customers to inform Metro's plans to commercialize rail stations (1,077 respondents)

RESR also conducted several focus groups with Metro customers to inform matters like the design of future Metrobuses, customers' safety concerns when riding Metrorail and Metrobus, and the launch of new mobile products.

Moreover, in February 2019, RESR completed the 2018-2019 Metrobus Passenger Survey, a large-scale effort that captures information on customers' jurisdiction of residence, their demographic information, and their travel behavior (26,910 responses)

collected via onboard intercept surveys).

Discussion:

Over the last 10 years, the Contact Center has observed a shift in customer behavior as it relates to how customers contact Metro, and consistency in the reasons why customers contact Metro.

With the increasing self-service digital choices (such as MetroAlerts, wmata.com mobile enhancements, social media, and mobile transit apps), customers increasingly choose to engage digitally.

This has been observed at the Contact Center over the past six years, as telephone contact decreased by 41% and emails increased by 45%. Since 2017, the new digital channels have experienced tremendous growth - Live Chat engagements have grown by 180% and Twitter engagements by 10% over a three-year period.

Our customer analysis also shows that mode of travel (bus v. rail) and age are keenly associated with how customers communicate. Metrobus customers and seniors rely heavily on telephone contact, while younger, more tech-savvy rail customers use Twitter and Live Chat to engage with us.

The trend toward digital communications is consistent with our findings that the vast majority of Metrorail and Metrobus customers have smartphones.

The primary reasons for customer contact remain largely unchanged – and focus on trip planning and fare and schedule information. In 2019, trip planning inquiries represented 92% of all Contact Center activity. Only 8% of engagements were to report an issue, make a suggestion, or offer a commendation. The top issues are:

1. Service concerns
2. Employees complaints
3. Maintenance issues

In response to customers' second top issue – employee rudeness – we are launching a new Customer Service Training Program for all customer-facing employees. The program is a first of its kind, in two important ways:

1. It sets a singular Metro standard as it relates to delivering customer service
2. It represents a unified approach to customer service for both bus and rail employees

Rolling out of the new All-Star Pride standard of customer service was delayed by the pandemic and will resume in the Fall.

Finally, the Public Participation Plan (PPP) facilitates inclusive engagement with our customers. Since implementation of Metro's first PPP in 2015, more than 100 projects have followed the PPP - including 60 in the past three years - with thousands of engagement activities conducted to provide equitable outreach, gain community feedback, and inform customers about projects and policies. Through the Office of Equal

Opportunity, community organizations have been engaged to further enhance our reach. The PPP sets performance measures that track whether the agency is reaching desired outcomes.

The demographics of our customers differ on bus and rail, and targeted communications and outreach campaigns ensure we reach representative communities. The table provides some customer demographic comparison across modes:

	ALL MODES	BUS	RAIL
MINORITY	58%	81%	45%
LOW-INCOME	25%	46%	13%
LIMITED ENGLISH PROFICIENCY	13%	27%	5%

Some of the customer communications and outreach methods employed as part of the PPP include:

- Social media posts and website content
- Targeted marketing, including geo-targeted digital ads, NextDoor community listserv, minority and multi-lingual newspapers
- Signage at rail stations, bus stops and project sites
- In-person events, including “pop-ups” at rail stations, transit centers, and bus stops; bus “ride-a-longs;” public hearings (Compact-required), open houses, community meetings, and focus groups; multi-lingual outreach teams that provide support in up to seven languages
- Customer surveys in English and Spanish, with paper surveys and tablets used at in-person events to allow customers to participate in surveys on site
- Direct email to stakeholders and community-based organizations (CBOs)

Person-to-person outreach in the community is important for engaging minority, low-income and LEP populations. From January 2018 until March 2020 (pre-COVID-19), 26 projects included in-person outreach as part of their communications plans. These projects included:

- Gathering public input on budget proposals and service proposals
- Notifying customers about temporary service impacts or station closures
- Assisting customers in stations during major events
- Educating customers and encouraging feedback on planning studies

This summer, two significant outreach efforts involving in-person teams were undertaken:

1. In-person outreach teams staffed seven stations on the Orange and Silver Lines to inform customers ahead of the summer shutdown for the Platform Improvement Project. Once the shutdown began, multi-lingual teams provided customer service for the shuttle bus operation. More than 111,000 customer interactions were noted, with 20% in languages other than English (Spanish, Korean and Amharic)
2. Metro’s track work plan carried out this summer involved rolling, week-long shutdowns of stations. To alert customers to the closures and travel alternatives,

outreach teams staffed 14 stations ahead of the closures. The teams employed new protective measures to ensure their health and the health of Metro customers. Despite historically low ridership due to the pandemic, approximately 50,000 customer interactions were recorded, including 10,400 interactions in Spanish, Amharic, Korean and Portuguese.

In addition, Metro’s communications team has started using the NextDoor community platform to provide hyperlocal information to customers and residents. The platform provides access to more than 780,000 NextDoor members across Metro’s entire service area. On NextDoor, Metro can send messages to the entire area; to targeted communities within a certain radius of a station or other address; or to specific neighborhoods. A few examples of how we’ve used NextDoor include:

- COVID-19 service changes across the entire service area
- Public Hearing Notifications for local projects (Grosvenor Parking Garage & New Carrollton Joint Development)
- Major construction updates targeting impacted communities (Platform Improvement Project & Summer Track Work)

FUNDING IMPACT:

n/a	
Project Manager:	Lynn Bowersox
Project Department/Office:	Department of Customer Service, Communications and Marketing (CSCM)

TIMELINE:

Previous Actions	<p>2014 – Metro’s first Public Participation Plan is approved by the Board of Directors</p> <p>2017 – Updated 2017-2020 PPP is approved by the Board as part of Metro’s Title VI Program</p>
Anticipated actions after presentation	September 2020 – Metro’s 2020-2023 PPP to be reviewed by the Board of Directors as part of Metro’s Title VI Program

RECOMMENDATION:

No recommendation is required for an information item.

Customer Communications, Outreach and Engagement

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09/24/2020

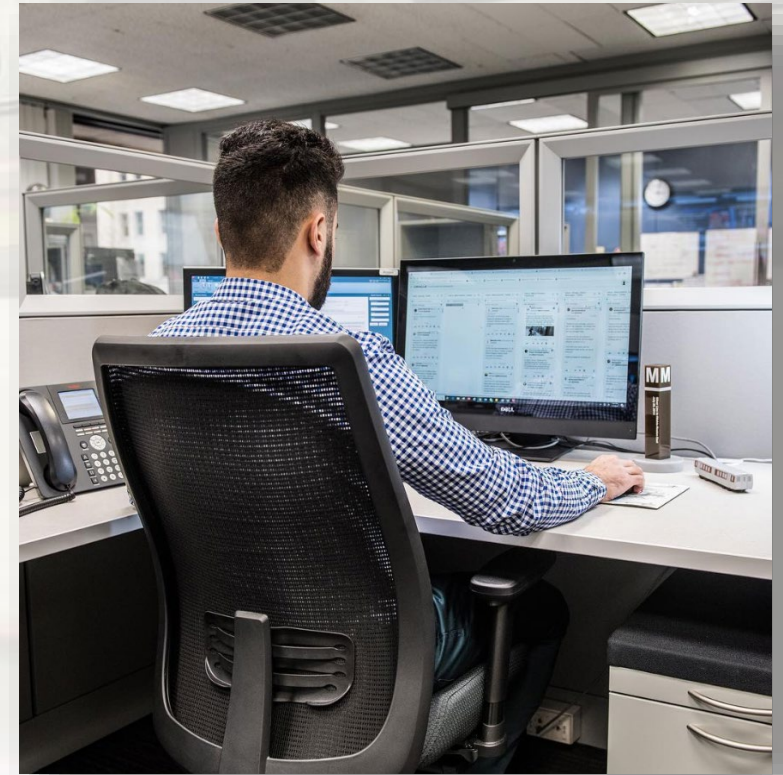


Purpose

- At Board's request, provide overview of customer engagement
- Discuss customer engagement methods, specifically related to:
 - Customer Service (CSVC) Contact Center, and
 - Metro's Public Participation Plan (PPP), approved by the Board as part of Metro's Title VI Program
- Review policy issues for discussion

Customer Service Contact Center

- Approx. 50 employees engage customers through live chat, Twitter, email and phone
- 630,000 contacts (phone, email, chat) in 2019
- Unified management team oversees four units:
 - Customer Information (responds via phone)
 - Customer Relations (responds via email & phone)
 - Social Engagement (responds via Twitter/live chat)
 - Lost & Found (responds via email & phone)
- Integrated Voice Response (IVR) system annually provides hundreds of thousands of telephone customers with self-serve transit information.
- Language Line



How Customers Contact Us

- Six-year trends:
 - Total contacts down 41%
 - Emails up 45%
- Since 2017, digital channels experienced tremendous growth:
 - Live Chat engagements up 180%
 - Twitter engagements up 10%
- Communications preference tied to mode of travel and customer age:
 - Metrobus customers and seniors rely heavily on telephone
 - Younger customers and Metrorail riders use Twitter and Live Chat

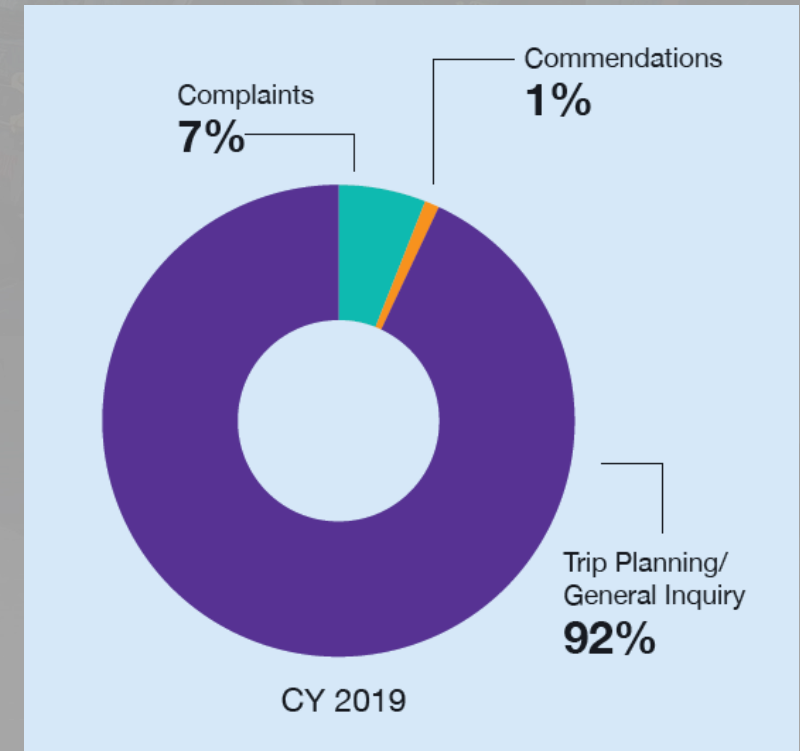
2019 Contact Center Report



Why Customers Contact Us

- 1.1 million visits to wmata.com every month as the primary gateway for info – top reasons for visits are trip planning and real-time train arrivals
- Similarly, trip planning inquiries represented 92% of all Contact Center activity in 2019
- 8% of engagements in 2019 were to report an issue, to make a suggestion, or to offer a commendation
- The top customer complaints:
 - Service concerns
 - Employees complaints
 - Maintenance issues

2019 Contact Center Activity



Total contacts received =
627,320

Increased Engagement on Social Channels



4 twitter accounts:

- @wmata
- @metrorailinfo
- @metrobusinfo
- @metrotransitpd

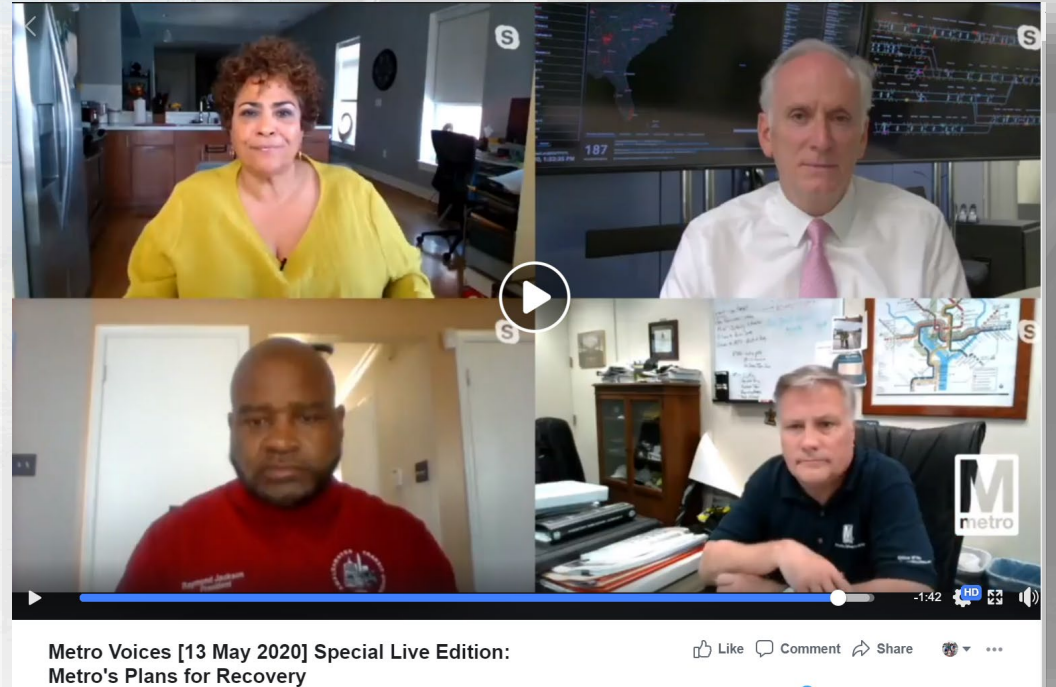
439,000 combined followers



instagram.com/metroforward
11,700 followers



facebook.com/metroforward
19,000 followers



youtube.com/metroforward
5,637 followers



PPP Overview

- Required by FTA Circular 4702.1B as part of Title VI Program
- Lays out Metro's strategies to engage minority, low-income, and limited and no-English proficient (LEP/NEP) populations with public outreach
- First approved by Board in 2014; updated and approved in 2017 as part of Title VI Program
- PPP Guiding Principles:
 - Inclusive
 - Collaborative
 - Responsive
 - Consistent



Project-based Outreach

■ What triggers the PPP?

- Studies & Pilots
- Amenities, Environmental & Infrastructure Changes
- Service Changes
- Policy Alternatives & Fare Changes
- Public Information & Notification

■ PPP best practices:

- To involve Title VI populations, go where they are
- Make it convenient to attend events
- Translate materials and use graphics
- Tailor event formats to the preferences of groups whose input is sought
- Acknowledge and use input



Communications & Outreach Methods

- Social media, website
- Targeted marketing
 - Geo-targeted digital ads
 - NextDoor community listserv
 - Minority and multi-lingual newspapers
- Signage at rail stations, bus stops and project sites
- Customer surveys in English and Spanish
- In-person events
 - Pop-ups at rail stations, transit centers, and bus stops; bus “ride-a-longs”
 - Public hearings (Compact-required), open houses, community meetings, focus groups
 - Multi-lingual outreach teams can provide support in seven languages
 - Paper surveys and tablets at events allow customers to participate in surveys on site
- Direct email to stakeholders and community-based organizations (CBOs)



Accessibility Requirements

- PPP requires that all communications plans include tactics to ensure impacted customers and community members have access to the information they need and the ability to participate
- Tactics guided by:
 - Metro's Language Access Plan for individuals with limited and no-English proficiency (LEP/NEP)
 - Americans with Disabilities Act (ADA) requirements for individuals with disabilities and senior citizens



2020-2023 PPP

- Third edition has been reorganized (and streamlined):
 - **Chapter 1: Principles of Metro's Public Participation** now includes key findings and evaluation information previously in other areas of the plan
 - **Chapter 2: Guidelines for Public Communication & Outreach** has been adjusted to follow the Project Management Institute (PMI) process that many internal and external project managers use
 - **Chapter 3: 2017-2020 PPP in Review** summarizes the work done over the last three years around public communications and outreach and highlights initiatives like the Equity Working Group



Topics for Ongoing Discussion

Community Engagement

How can Metro build meaningful relationships with organizations supporting equity communities?

Accessibility

What is needed to improve communications for LEP/NEP, visually impaired, and other accessibility groups?

Title VI & Transportation Equity

What role does the PPP and communications play in supporting transportation equity?

Post-Covid Adaptations

How are virtual meetings and other COVID-19 precautions impacting customer communications and engagement?