

# **2000 STRATEGIC PLAN UPDATE**

## **TRANSPORTATION RESEARCH BOARD**

### **HIGH-OCCUPANCY VEHICLE SYSTEMS COMMITTEE A3A06**

**Strategic Planning Committee**

**December 2000**

# HOV SYSTEMS COMMITTEE A3A06

## I. STRATEGIC PLANNING DEFINITION

STRATEGIC PLANNING is the act of developing policies, choosing actions, and allocating resources to achieve desired objectives within the context of anticipated local, regional, state, national, and international conditions. This STRATEGIC PLAN is intended to be future-oriented and continuous. Its policies, actions, and resource allocations should be regularly evaluated in light of changes in areas of strategic influence.

## II. GOALS OF HOV SYSTEMS COMMITTEE

The HOV Systems Committee has four primary goals, as illustrated in **Figure 1**. These goals focus the attention of the Committee on emerging and ongoing issues related to the planning, design, operation, and marketing of HOV facilities and programs.

The four primary goals of the Committee are as follows:

- **Exchange Emerging Information on HOV Systems-** The Committee seeks to provide timely information on key issues affecting HOV systems. This is accomplished through ongoing newsletters, web page, reports, and biannual HOV System Conferences.
- **Document HOV Experiences-** The Committee encourages the documentation of HOV experiences in North America and abroad.
- **Develop HOV Consistency-** The Committee serves as a source of consistent definitions and guidelines relating to HOV systems.
- **Implement Research Program-** The Committee supports an active research program aimed at improving the state-of-the-practice in HOV systems planning, operation, design, and marketing.

In order to accomplish these goals, the Committee has established a strategic plan that guides the ongoing activities of the Committee.

## III. STRATEGIC PLAN DISCUSSION

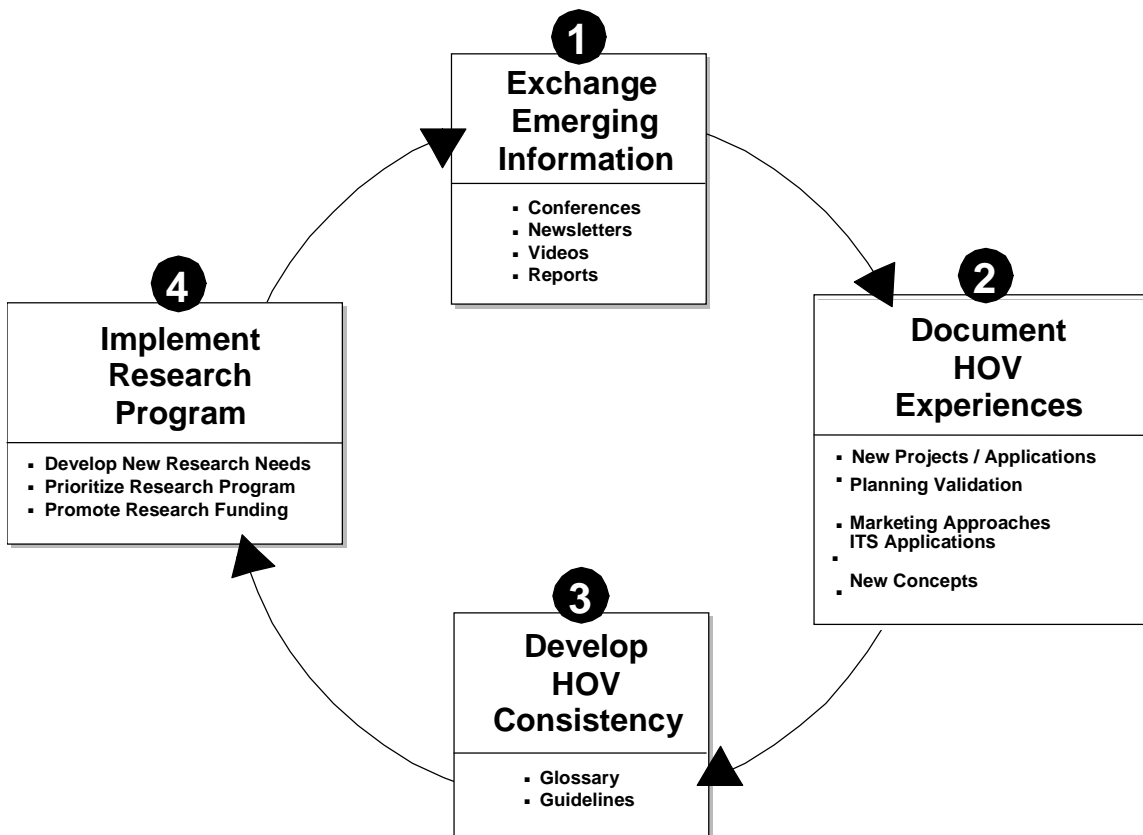
The strategic plan for the Committee provides a clear set of priorities to be undertaken over the next two years. These priorities include internal matters, over which the Committee has direct control, as well as external matters that directly affect the success of the Committee. One example of an external matter might be funding policies and legislation for HOV projects. The Committee does not control such funding, but a change in HOV policies would obviously affect the Committee's objectives.

The Committee's strategic plan sets guidelines within which the various activities of the Committee (both current and proposed) can be assessed. Major objectives of the Plan are:

- The STRATEGIC PLAN ties into the scope of the Committee.

- The STRATEGIC PLAN includes performance measures as a way of measuring achievements.
- The STRATEGIC PLAN defines and addresses matters that are external to the organization.
- The STRATEGIC PLAN is designed to recognize the skills, capabilities, and other limitations of the Committee.
- The STRATEGIC PLAN addresses matters of national concern that involve HOVs.
- The STRATEGIC PLAN identifies target dates as to when certain elements are expected to be achieved.
- The STRATEGIC PLAN incorporates a five-year outlook for research activities along with a two-year action plan.
- The STRATEGIC PLAN is being programmed to be updated bi-annually.

**Committee A3A06 Activity Cycle**



In order to efficiently address these needs, the Committee is organized around four subcommittees that address the following:

Information Development and Dissemination

*Description:* The Information Development and Dissemination subcommittee is responsible for making sure that timely HOV information is available for use by transportation professionals and public officials.

*Goal:* Ensure timely dissemination of information through the use of the biannual HOV conference, TRB annual meeting sessions, newsletters, and research.

*Priorities:*

#### Research, Planning, Design and Operations

*Description:* The Research, Planning, Design and Operations subcommittee is responsible for ensuring that the committee's priorities are achieved in the areas of HOV research, planning, design, and operations.

*Goal:* Prepare an ongoing research program with partner organizations, and support task force activities relating to HOV planning, design, and operations.

*Priorities:*

#### Marketing and Outreach

*Description:* The Marketing and Outreach subcommittee is responsible for preparing timely marketing information that supports the use of HOV systems.

*Goal:* Prepare ongoing marketing information related to HOV systems, in cooperation with partner organizations, and support task force activities relating to HOV marketing.

*Priorities:*

#### Strategic Planning

*Description:* The Strategic Planning subcommittee is responsible for preparing and maintaining the Committee's strategic plan.

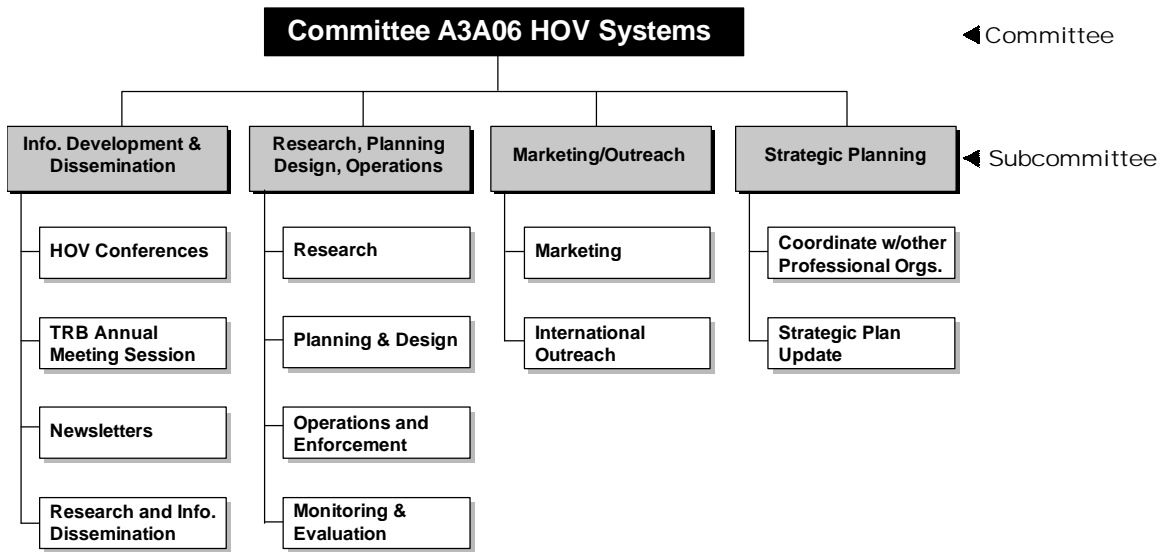
*Goal:* Prepare an update to the Committee's strategic plan at least every two years and coordinate with other professional organizations regarding the strategic direction of HOV systems.

*Actions:*

- Finalize strategic plan update by November 2000.

As shown in **Figure 2**, there are several task forces/ad hoc action committees working on emerging HOV issues within each subcommittee. The subcommittees and task forces are the focal point of the committee activities and strength.

The Committee will need to continually evaluate the Committee's strengths and weaknesses in regard to the STRATEGIC PLAN. Does it need additional skills for the Committee to achieve its goals? Are there other resources that will be needed, and can they be obtained within the TRB committee structure? Does the STRATEGIC PLAN needs reflect the limitations of a voluntary organization?



Key Committee Issues

- Arterial Street HOV Applications
- Managed Lane Applications
- ITS Strategies for HOV Systems
- Role of Transit
- Approaches to Monitor and Evaluate HOV
- Innovative HOV Systems Award
- HOV Issues Paper

## IV. STRATEGIC PLAN ELEMENTS - COMMITTEE A3A06

The updated strategic plan includes several priorities that have emerged during the late 1990's. In order to differentiate the priorities that face the entire committee from those that are oriented to task force activities, the strategic plan elements have been divided into two sections. Together, these elements constitute an ambitious set of priorities for the Committee to achieve during the 2000-2005 period. Each of these elements has been assigned to a specific subcommittee to facilitate timely completion.

### 1. Overall Committee Priorities

Several priorities affect the overall operation and focus of the Committee, as identified in elements A through E.

#### A. Strengthen and increase communication and information sharing on HOV systems through newsletters, HOV conferences, TRB annual meeting sessions, and other mechanisms (Information Development and Dissemination)

*Purpose:* Enhance the knowledge and level of understanding of HOV systems, including their role as important components of regional transportation plans.

*Actions:*

- Review and develop technical sessions and papers for TRB annual meeting sessions, HOV conferences, and related meetings

- Prepare a regular newsletter describing recent events in HOV system development
- Actively participate in information-sharing workshops and conferences on HOV systems developed by other organizations

*Time frame:* Ongoing

**B. Identify major research needs associated with the development, implementation and operation of HOV facilities (Research, Planning, Design and Operations)**

*Purpose:* Identify existing research activities, to identify future research needs, to monitor research activities, to publicize results, and to identify and match funding resources with priority research activities.

*Actions:*

- Refine the research plan adopted by the Committee in 1998 with a focus on preparing research problem statements and identifying potential funding sources and agencies and/or individuals interested in conducting the research.
- Actively work with other organizations to prioritize and fund needed HOV research activities.

*Time frame:* Completion of Updated Research Program by TRB 2001

**C. Conduct a comprehensive assessment of the HOV technical and policy issues that have been identified nationally over the past five years (Information Development and Dissemination)**

*Purpose:* Examine the benefits and costs of HOV facilities related to technical and policy issues that have been identified nationally over the past five years (from 1995-2000).

*Actions:*

- Develop a technical “white paper” that discusses the issues associated with HOV Facility Development and Operation.

*Time frame:* Complete a rough draft for review at the 2000 mid-year meeting of the Committee with a goal of having a final version for presentation at the 2001 TRB meeting. Continue as an on-going activity.

**D. Review Name and Function of HOV Systems Committee (Marketing and Outreach)**

*Purpose:* Reexamine the role and function of the HOV Systems Committee within TRB and the transportation profession. Identify the need, if any, for a change in the Committee’s focus and/or name.

*Actions:*

- Review current committee purpose and responsibilities
- Identify alternative committee names and/or responsibilities
- Prepare recommendation on committee role and name

*Time Frame:* Prepare recommendation by committee at TRB 2001

## **E. Update the STRATEGIC PLAN (Strategic Planning)**

*Purpose:* To assure that the STRATEGIC PLAN is current and that schedules and objectives are being achieved.

*Time frame:* Bi-Annually

## **2. Task Force/Ad Hoc Action Groups**

The following strategic priorities (elements F through M) relate to high-priority task force activities that have emerged over the past year. These priorities were identified at the June 1999 Mid-year meeting of the Committee and will serve as the focus of technical activities during the next two years. The Task Forces are intended to operate for a limited time to address specific 'hot topics' in HOV Systems.

### **Document Arterial Street Applications of HOV facilities (Research, Planning, Design and Operations)**

*Purpose:* Examine the role of arterial street HOV facilities within an overall HOV system.

*Actions:*

- Prepare inventory of arterial HOV facilities
- Develop contacts with local traffic and transit officials
- Prepare synthesis of current practices, including documentation of analysis methods and impacts

*Time Frame:* Prepare draft discussion paper by TRB 2001

*Lead:* Tom Mulligan

### **Document 'Managed Lane' applications to HOV facilities (Research, Planning, Design and Operations)**

*Purpose:* Document the pros and cons of managed lanes, including situations under which HOV facilities could effectively operate as managed lanes.

*Actions:*

- Research recent experiences with managed lanes
- Prepare discussion paper focused on appropriate applications of a managed lane approach to HOV facilities

*Time frame:* Develop a draft of an initial strategy for discussion at the 2000 mid-year meeting of the Committee. Complete version for presentation at the 2001 TRB meeting.

*Lead:* Chuck Fuhs

## **H. Document benefits of Integrated HOV Systems (Research, Planning, Design and Operations)**

*Purpose:* Emphasize the importance of integrating HOV facilities and programs into systems

*Actions:*

- Compile case study examples of HOV systems and document
- Define performance measures appropriate for analyzing systems
- Prepare white paper on the benefits and need for HOV systems

*Time Frame:* Develop an outline for the white paper and compile list of case studies by TRB 2001.

*Lead:*

## **I. Identify role of ITS strategies within HOV systems (Research, Planning, Design and Operations)**

*Purpose:* Demonstrate how advanced technologies can assist in the success of HOV facilities

*Actions:*

- Document advanced technologies that can affect the success of HOV facilities
- Prepare case study examples of ITS applications to HOV facilities and supporting programs (e.g. enforcement, traffic management, TDM)
- Participate in joint committee and organization activities relating to ITS
- Prepare best practices papers documenting lessons learned with ITS applications to HOV facilities
- Include within training materials

*Time Frame:* Prepare strategic approach by TRB 2001

*Lead:*

## **J. Examine Bus Rapid Transit (BRT) Applications to HOV systems (Research, Planning, Design and Operations)**

*Purpose:* Identify the relationships between transit, carpooling, and vanpooling within an HOV system. Identify the specific role and needs of transit.

*Actions:*

- Document examples of transit applications in HOV systems. Include bus rapid transit applications,
- Conduct outreach with partner organizations, including APTA
- Sponsor joint sessions with bus transit systems
- Prepare white papers documenting transit relationships with HOV systems

*Time Frame:* Prepare strategic approach by TRB 2001

*Lead:* Bill Finger, Ed Marks

## **K. Document Environmental Benefits and Impacts of HOV facilities** (Research, Planning, Design and Operations)

*Purpose:* Emphasize the role of HOV facilities in promoting cleaner environments and support of other demand management strategies.

*Actions:*

- Prepare inventory of environmental analyses conducted on HOV facilities
- Document evaluation tools used to examine environmental impacts of HOV facilities and systems
- Prepare discussion paper addressing environmental benefits and impacts, including air quality, trip length, and land use effects

*Time Frame:* Prepare draft discussion paper by TRB 2001

*Lead:* George Human, Ed Marks

## **L. Develop Approaches to monitor and evaluate HOV facilities** (Research, Planning, Design and Operations)

*Purpose:* Emphasize the importance of monitoring and evaluating new and ongoing HOV facilities.

*Actions:*

- Prepare inventory of evaluation studies conducted on HOV facilities. Compile best practices on a CD-ROM
- Prepare guidelines for monitoring and evaluating HOV facilities, including data requirements, resource needs, and formats

*Time Frame:* Prepare draft discussion paper by TRB 2001

*Lead:* Kevin Hoboian

## **K. Develop Innovative HOV Systems Award** (Marketing and Outreach)

*Purpose:* Sponsor an annual award for innovation in implementing HOV facilities and programs.

*Actions:*

- Prepare guidelines for one or more awards
- Identify award candidates
- Prepare outreach program for marketing the award

*Time Frame:* Present first award(s) at TRB 2001 or 2002 HOV Systems conference

*Lead:* Luisa Paiewonsky, Heidi Stamm