

ITS PCB Peer Exchange Guidelines

Background

The Peer Exchange Program provides short-term technical assistance to agencies facing ITS planning, procurement, deployment, and operational challenges. The program is an important tool for transferring ITS knowledge, resources, and experiences among public agencies involved in the transportation system. The Peer Exchange Program is sponsored by the ITS Professional Capacity Building Program, U.S Department of Transportation.

Eligibility to Apply for ITS PCB Peer Exchange Assistance.

List of allowable PEER APPLICANTS for the Peer Exchange Program:

- State and local Departments of Transportation
- Transit agencies
- Metropolitan and Statewide Planning organizations
- Emergency and public safety organizations
- Motor carrier offices
- Other* (*Please list Agency)

Peer Exchange Technical Assistance Delivery Formats.

The most frequent forms of peer support eligible:

- Referrals to an experienced peer or technical expert for **support by telephone and email.**
- **Technical Assistance** from a knowledgeable PEER EXPERT. Examples include:
 - A Peer Expert visits Peer Applicant agency to engage in face-to-face problem solving.
 - Peer Applicant travels to an agency to observe and learn from an agency peer who has developed solutions addressing the challenges identified by the applicant.
- **Training workshops** instructed by an experienced peer or technical expert (on-site, webinar-based, or video conferencing).
 - A Peer Expert identifies your ITS challenge as a critical issue faced by many agencies and proposes a webinar on the topic (transferring knowledge to a wider audience).
- **Facilitated peer exchange.** Peer Applicant seeking a peer exchange/peer expert to support an event, such as a conference or venue that seeks a broader audience.

Deliverables Expected for Accepting Peer Exchange Funds.

As the recipient of the peer exchange, the Peer Applicant will be expected to submit an Event Evaluation (See criteria below) that provides us with your assessment of the quality and effectiveness of the peer exchange.

Additionally, the Peer Applicant will be expected, if requested by the Peer Exchange Program organizers, to support and participate in a [Talking Technology and Transportation](#) (T3) webinar, where lessons learned can be shared with the larger ITS community. Support from Peer Exchange organizers will be provided to all parties involved in the Peer Exchange to produce T3 webinar.

Definitions Related to Peer Exchange Activities.

- PEER APPLICANT is an individual, organization, or other entity seeking ITS support, technical knowledge or solutions from another peer.
- AGENCY PEER EXPERT is an individual or group of individuals who provides technical

assistance to the Peer Applicant based on the agency's experiences implementing an ITS solution for which the Peer Applicant is seeking support.

- PEER EXPERT is an individual selected based on his/her stated expertise in a particular area pertaining to ITS and the deployment process who provides expertise to a Peer Applicant.
- HOST AGENCY is the agency or entity that employs the Peer Expert(s) that the applicant is seeking ITS support, technical knowledge or solutions.
- PEER EXCHANGE PROGRAM ORGANIZERS refers to the U.S. DOT's ITS Joint Program Office (JPO) Professional Capacity Building (PCB) Program Team which operates the ITS PCB Peer Exchange and facilitates the approval of Peer Applicant requests; travel approvals, logistics, funding, and reimbursements; selects Peer Experts in cooperation with the ITS JPO PCB Program and other PCB Program partners (i.e., ITS America) and agencies implementing ITS Programs, as necessary; and manages reporting processes and requirements related to peer exchanges.
- EVENT EVALUATION When you participate in the Program as a Peer Applicant, you agree to provide the Program with an Event Evaluation upon completion of the peer exchange. The Event Evaluation and other materials generated by the peer exchange may be used as a basis for future Talking Technology and Transportation webinars, lessons learned, FAQ documents, or other learning resources, unless previously negotiated by the applicant, expert and ITS PCB Peer Exchange Organizers.

APPLICATION PROCESS

Upon completion of the online application; the ITS PCB Peer Exchange Organizers will contact the Peer Applicants and begin the formal application process. The statements below are included in that process and are provided here for information purposes only.

PROGRAM TRAVEL FUNDING SUPPORT:

Travel funding is provided by the ITS PCB Peer Exchange through ITS JPO PCB Program. The maximum dollar amount allowed for travel is \$5,000 per peer event or \$2,500 per individual. Time/labor and other expenses are not reimbursable under the ITS PCB Peer Exchange. Travel by Peer Applicants and Peer Experts must comply with Federal Travel Regulations (FTR). Travel expenses that do not comply with the FTR will not be reimbursed. ITS PCB Peer Exchange Organizers will provide travel guidance to Applicants and Peer Experts prior to a peer event.

PROPRIETARY INFORMATION

Any data or information containing business, commercial or financial information or that embodies trade secrets developed at private expense that is provided by an applicant or Peer Expert under this Agreement. Proprietary information includes, but is not limited to, any information disclosed and identified (in written format) as confidential information by the agency, its employees, agents, representatives and consultants to the Peer, such as: the Peer Expert or Agency's business, including processes and services; capabilities of the business; marketing and planning programs; product specifications, plans, and drawings; financial, operational, and technical data; and any other information that could be subject to intellectual property rights.

GENERAL PROVISIONS and DISCLAIMERS

- Peer Experts provide professional advice, experience-based knowledge, and lessons learned to broaden understanding of the issues involved in the applicant's particular challenges. In accepting the input, the Peer Applicant and their agency agree to assume responsibility for ensuring the reasonableness and soundness of the advice received by the Peer Expert(s) thus not holding either the U.S. DOT, the ITS PCB Peer Exchange Organizers, any Identifying Partners or agencies such as ITS America or the Peer Expert responsible for outcomes following

the peer applicant and their agency's decision to act upon the advice given.

- Participation in the Program is not subject to any assignment. Any attempted or actual assignment shall be void.
- The agreement entered constitutes the entire agreement between the parties concerning the subject matter hereof and supersedes any prior understanding, written agreement, or oral agreement relative to said matter.
- All activities pursuant the Agreement entered between Peer Applicants and Peer Experts shall comply with all laws and regulations prohibiting discrimination on the grounds of race, color, creed, national origin, handicap, religion, gender, and marital status in providing for facilities and service to the public.
- Peer Applicant is not an employee, office, agent, or independent contractor of the Federal Government, and has no authority to act on behalf of the Federal Government. Peer Applicant is liable for his/her conduct at all times, and shall hold the Federal Government harmless for any negligent or willful acts or omissions of the Host Agency, his or her employees, officers, agents, directors, invitees, contractors, or consultants that may cause harm to the Peer Applicant, Peer Experts, Host Agencies, other Peer participants, or to the Program.
- While on the premises of the Host Agency, the Peer Applicant(s) shall comply with all safety and security requirements at the Host's facility. Further, the Host Agency shall take all reasonable steps and precautions to prevent any accident and to preserve the life and well-being of the Peer Applicant, the Host Agency's personnel, and the general public.
- All Peer Experts are required to abide by a set of rules when engaging with you. During a peer exchange, peer participants are bound by the U.S. Department of Transportation's Conflict of Interest Policy. Under these regulations, a Peer Expert is not allowed to market services to the Peer Applicant beyond the technical expertise they deliver in the peer exchange.

Event Evaluation Process

Follow Up Email

This email is generated by the ITS PCB Peer Exchange organizers at the U.S. DOT.

According to our calendar, you recently completed an ITS Peer Exchange event. Now that the event is over, we would like to ask you a few questions about what you learned and how you may apply what you learned to your job and in your agency.

Please fill out a Final Report for the event and submit within 15 business days. We thank you ahead of time for your cooperation.

Follow Up Report Form

ITS Peer Exchange Event Final Report

We appreciate your response to these questions. Your answers to these questions help us evaluate the effectiveness of the program. The ITS PCB Peer Exchange Organizers will provide support in completing the Final Report and subsequent resources.

The following fields are required:

1. List the main activities that took place during the event.
2. What was the value of the event for you, in terms of ITS knowledge gained and/or other benefits?
3. How do you expect your agency will benefit from the knowledge you gained?

Optional:

4. How will you share the knowledge you gained with peers in your agency or in your professional network?
5. Feel free to provide any other feedback:

ITS Peer Exchange Final Report (Based on Event Format)

Event - Peer Applicant travels to an agency to observe and learn from an agency expert who has developed solutions addressing the challenges identified by the applicant.

(Note: An assumption is that the Peer Expert will be an agency peer who transfers knowledge by demonstrating or describing a best practice used in his/her agency.

Peer Applicant:

1. Provide a 1 – 2 paragraph recap of the event and the approach taken to respond to the problem?
2. What did you learn?
3. How will knowledge you gained from the event impact on your ITS project? What might change or be different – in your own approach or your agency's approach to ITS undertakings – now that you have participated in the peer exchange?
4. What additional resources (online or classroom courses, workshops, webinars, social media

tools) and/or what additional subject matter would add to you or your team's capabilities to perform your ITS-related job duties?

5. Feel free to provide any additional feedback.

Peer Expert

1. Provide a 1 – 2 paragraph descriptions of the ITS problem faced by the agency and your approach to helping the agency address it.
2. What actions or next steps did you suggest?
3. Do you believe this problem was unique to the visiting agency or more widespread? If yes, in your opinion, what is the best approach to transfer knowledge about the topic to other agencies?
4. Do you have any suggestions for ways to improve peer exchanges?
5. Feel free to provide any additional feedback.

Event – A Peer Expert visits Peer Applicant agency to engage in face-to-face problem solving.

(Note: An assumption is that the Expert in this event will be a consultant or public sector expert who transfers knowledge through intense, short-term focus on the ITS problem.)

Peer Applicant:

1. Provide a 1 – 2 paragraph recap of the event and the approach taken to respond to the problem?
2. What did you learn?
3. How will knowledge you gained from the event impact on your ITS project? What might change or be different – in your own approach or your agency's approach to ITS undertakings – now that you have participated in the peer exchange?
4. What additional resources (online or classroom courses, workshops, webinars, social media tools) and/or what additional subject matter would add to you or your team's capabilities to perform your ITS-related job duties?
5. Feel free to provide any additional feedback.

Peer Expert

1. Provide a 1 – 2 paragraph description of the ITS problem faced by the agency and your approach to helping the agency address it.
2. What actions or next steps did you recommend?
3. Was sending a peer expert that most effective way of addressing the agency's problem?
4. Do you believe this problem was unique to the agency or more widespread?
5. Do you have any suggestions for ways to improve peer exchanges?
6. Feel free to provide any additional feedback.

Event - Referrals to an experienced peer or technical expert for support by telephone and email.

Peer Applicant

1. Provide a 1 – 2 paragraph recap of the event and the approach taken to respond to the problem?
2. What did you learn?

3. How will knowledge you gained from the event impact on your ITS project? What might change or be different – in your own approach or your agency's approach to ITS undertakings – now that you have participated in the peer exchange?
4. What additional resources (online or classroom courses, workshops, webinars, social media tools) and/or what additional subject matter would add to you or your team's capabilities to perform your ITS-related job duties?
5. Feel free to provide any additional feedback.

Peer Expert

1. Provide a 1 – 2 paragraph description of the ITS problem faced by the agency and your approach to helping the agency address it.
2. What actions or next steps did you recommend?
3. Was sending a peer expert that most effective way of addressing the agency's problem?
4. Do you believe this problem was unique to the agency or more widespread?
5. Do you have any suggestions for ways to improve peer exchanges?
6. Feel free to provide any additional feedback.

Event - Facilitated peer exchange. Peer Applicant seeking a peer exchange/peer expert to support an event, such as a conference or venue that seeks a broader audience.

Peer Applicant

1. Give your opinion on the learning value of the presentation. Did it address its original intent?
2. Do you see a need to deliver this topic to a wider audience through a webinar?
3. Do you have any suggestions for ways to improve peer exchanges?
4. Feel free to provide any additional feedback.

Peer Expert

1. Approximately how many people attended the presentation?
2. Characterize the questions asked during the presentation?
3. What did you gain from presenting? Did you learn about similar best practices or lessons learned?
4. Feel free to provide any additional feedback.

Event Training workshops instructed by an experienced peer or technical expert (on-site, webinar-based, or video conferencing).

No questions. Feedback from webinar is sufficient.