



## STRATEGIC PLAN UPDATE

Recommendations from the Task Force

June 2015

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### Background

Commute.org, formerly known as the Peninsula Traffic Congestion Relief Alliance, is San Mateo County's Transportation Demand Management agency. The agency was formed in 2000 by the merger of two agencies that performed similar tasks in different parts of the county. Structured as a joint powers agency (JPA), Commute.org is governed by its 18 members – 17 cities and towns as well as the County of San Mateo.

Transportation Demand Management, or TDM, is a general term for strategies and policies that reduce demand for motor vehicle travel, particularly in single occupancy vehicles. TDM programs can address a wide range of externalities associated with driving, including congestion, poor air quality, less livable communities, reduced public health, reduced environmental health, and GHG emissions. Commute.org's TDM programs focus on reducing travel demand in San Mateo County particularly at peak commute hours.

Commute.org developed and adopted its first comprehensive strategic plan in 2009. The plan defined the agency's relationship and responsibilities to its members, funders, and partners. The plan also established metrics to measure program performance. The original strategic plan was a "five-year plan" that has been used as a guiding document from 2010 through the present.

In 2014, the Commute.org board of directors authorized the formation of a Task Force to review the strategic plan. The Task Force was comprised of board members, supervisory committee members, and representatives from the agency's funders. The Task Force reviewed the existing plan and determined that an update rather than a rewrite was the best alternative, and that the updated plan be presented for adoption by the end of the current fiscal year.

This document outlines the updated version of Commute.org's Strategic Plan. The core elements of the original plan are retained with updates being made as described in this document. The intent is to produce a "living" document that will serve as a guide to the agency's program of work for future years. The Task Force recommends that the strategic plan continue to be reviewed and updated on an ongoing basis.

## Objectives

Commute.org's primary objective is to reduce single occupant vehicle (SOV) commute-related travel to, from and through San Mateo County. The results of reducing commute-related SOV trips in San Mateo County are:

- Reduction in congestion on San Mateo County highways and surface streets
- Reduction in greenhouse gas emissions
- Attraction and retention of employers to San Mateo County (economic vitality)
- Improved quality of life for the residents of San Mateo County and surrounding communities

While non-commute SOV trips contribute to congestion and poor air quality, the agency does not have the resources to focus on reducing those trips. The agency supports all SOV trip reduction efforts and commits to partnering with other agencies on overall trip reduction efforts.

The goal for all Commute.org programs will be a reduction in the percentage of commute-related SOV travel to, through, or within San Mateo County. Not every program will have an easily measured SOV reduction goal; however, each program or opportunity should lead to SOV reduction.

In addition to SOV reduction, the agency has several subordinate objectives:

- Be recognized as San Mateo County's best resource for expert commute-related planning, programs, and tools
- Provide transportation demand management programs and incentives to JPA members, employers, and organizations in San Mateo County that help to encourage mode shifts away from the drive-alone option
- Support programs and technology that make it more convenient for anyone, anywhere, at any time, to have a competitive option to driving alone
- Operate in a transparent, cost-effective manner that reflects positively on the agency's members, funders, and partners
- Earn predictable, long-term commitments from funding partners that allow the agency to make investments in programs and staff
- Encourage non-member cities and towns (Menlo Park, Woodside and Portola Valley) to join the JPA, thereby completing and strengthening the alliance within San Mateo County

## Agency Tagline

The agency's tagline was updated in 2010 to its current version, which is: *Working Together To Improve Our San Mateo County Commute*. The statement clearly defines the agency's role as a county-wide body that focuses on commute-related issues. The word "Together" was originally included in the tagline to reference the breadth of the JPA structure, which is a differentiating strength of the agency. Now that the agency uses "Commute.org" as its name and has dropped "The Alliance" moniker, it will be incumbent on the agency to make clear in its performance that it truly is acting as an alliance of its members.

The Task Force discussed minor modifications to the tagline, but ultimately decided to keep it as-is for the time being. If, in the future, Commute.org expands beyond San Mateo County or takes on a different role in regional TDM programming, then the tagline will need to be updated to reflect the broadened scope.

## Transportation Landscape Changes

San Mateo County benefits by being part of Silicon Valley and being home to some of the world's most important technology and bio-technology companies. The county often serves as a petri dish for advancements in transportation-related technology and employer-sponsored commute alternatives. The changes that have taken place in the transportation sector since the original Strategic Plan was adopted are phenomenal. To put it in perspective, below are some of the things that have been introduced in San Mateo County since 2009:

- Ride-Hailing services like Uber, Lyft and Sidecar
- Ride-Sharing services like Carma, Tripda and Carzac
- Transportation-related apps like RideScout, Rider, Moovit and Transit
- Bay Area Bikeshare
- Widespread adoption of electric vehicles
- Electric vehicle charging stations in public, commercial, and retail locations
- RidePal (shared ride private coach service for commuters)
- Fleets of private buses providing employer-sponsored transportation
- Numerous online ridematching services
- Carsharing services like Car2Go, Getaround, DriveNow
- Google Maps with integrated GTFS data, linking almost all public transportation routes

Commute.org has integrated many of these services into its program offerings and employer support services over the years and needs to be ready and willing to do the same with the changes that will occur in the future. While we cannot predict what the future will bring, we can build an agency that is prepared to embrace the changes and use them to help us achieve our objectives. It is likely that autonomous cars will be a part of San Mateo County's transportation landscape by the next time that Commute.org does an update to the Strategic Plan.

## Technology

The application of technology to issues faced by employers and commuters is the single most important change in the TDM industry since the original Strategic Plan was adopted in 2009. It is not just the proliferation of smartphones and transit apps, but also the entirely different way that TDM agencies are able to interact with their constituents that has changed our industry. For example, social media was in its nascent stage in 2009. Now social media is a proven, yet constantly evolving, method for promoting, educating, and interacting with our target audiences.

Technology also allows a small organization like Commute.org to have a much greater reach. Leveraging limited program funding through smart and efficient uses of technology is critical to the agency's success now and will become even more important in the future. Each and every Commute.org program needs to incorporate technology that is proven, cost-effective, and scalable.

It is also critical that the agency use technology to measure and evaluate program performance in ways that have not been done in the past. Tools such as Google Analytics and GPS data analysis can and should be incorporated into the feedback process to guide agency staff on program improvement. The agency will take advantage of new technology to gauge performance more quickly and more frequently.

Commute.org has also been invited to participate in an emerging technology project led by Joint Venture Silicon Valley (JVSV). The project is based on the concept of Mobility as a Service (MaaS), which is a transport service model in which a customer's major commuting and traveling needs are met over one interface and are offered by service providers. The goal of the project is to form a regional MaaS public-private partnership that will develop and pilot new TDM tools focused on measurably increasing mobility, convenience, and productivity while reducing stress, congestion, and GHG emissions. The MaaS project is likely to be a multi-year, multi-phase effort that will have specific projects to be defined in Commute.org's annual programs of work.

The newly redesigned Commute.org website is the agency's vehicle for connecting commuters with technology. The site has been designed with flexibility in mind so that new technology can be incorporated rapidly and with minimal effort. The mobile version of the site will likely see the strongest growth in users. The desktop and mobile versions will include a tool that allows shuttle riders to track the status of their shuttle in real-time thereby increasing the commuter's productivity and reducing the demand on agency staff. Also, as MaaS evolves, the Commute.org website will become a trusted source for the tools that make it more convenient for anyone in the region to have a competitive option to driving alone.

## Agency Funding

Commute.org receives funding from various sources, none of which are dedicated or guaranteed. The City/County Area Governments of San Mateo County (C/CAG) and the San Mateo County Transportation Authority (TA) have traditionally provided approximately 60 percent of the agency's operating revenue. The Bay Area Air Quality Management District (BAAQMD) has provided approximately 35 percent of the operating revenue with their Transportation Fund for Clean Air (TFCA) grants, which are also managed by C/CAG. The Metropolitan Transportation Commission (MTC) has funded the agency with grant funds equaling 5 percent of the operating budget.

The C/CAG and TA funding is subject to annual fluctuations and must be approved by the boards of each agency. The BAAQMD funding is also subject to annual fluctuation and requires two separate board authorizations (BAAQMD and C/CAG respectively).

MTC's funding also gets distributed first to C/CAG and then to Commute.org. This funding (historically \$70,000/year) is being eliminated after FY2016/2017. MTC is eliminating the "Delegated County" program and is shifting those funds to their One Bay Area Grants (OBAG) program. The agencies that receive OBAG funds will determine what funding, if any, to provide to the agencies that were previously funded through the Delegated County program.

The shuttle program has different funding sources. Commute.org participates in a biannual call for projects where the TA and C/CAG funding is available to qualified shuttle sponsors. Commute.org, on behalf of JPA member cities, property managers, single employers, transit operators, or consortiums of employers, applies for funding of shuttle routes. The grant funds provide up to 75 percent of the operating costs of the shuttle service provider. The sponsors are required to fund the remaining portion of the costs. To date, Commute.org's costs to manage the shuttle program have been covered by the agency's general funding and have not been deducted from the shuttle grant funds or the consortium contributions. This model may change in the future as the shuttle program continues to evolve.

Funding and cash flow have long been concerns of the agency's board of directors. Receiving predictable, multi-year funding commitments from Commute.org's funding partners would allow the agency to make better long-term planning decisions. Multi-year agreements would also reduce the costs of annual grant cycles. The agency's board and staff will work with the funding partners to develop a mechanism that provides long-term funding along with assurances that the programs being funded are meeting the funders' requirements.

## Metrics

The Strategic Plan incorporated goals into each of the activities defined in the Program Area section. While the goals were useful for some of the activities, many proved to be too difficult to measure or unsuitable given the changing dynamics of the county during the economic recovery. For that reason, the updated plan will include new metrics that allow for dynamic

goal setting that will be more in line with the objectives of the agency and its funders. The Program of Work documents, approved annually by the board, will specify targets while also detailing historical performance.

The original Strategic Plan called for triennial “Commuter Profile” surveys. That has been the single source for measuring “mode shifts” (SOV reduction performance) in the county. Given that the overall objective of the agency is to reduce the percentage of commute-related trips in single occupant vehicles, it is imperative that the agency develop a mechanism to gather data on that metric more frequently. The update stipulates that measurements should be performed on an annual or quarterly basis.

## Program Areas

The Strategic Plan grouped agency activities into four program areas:

- Program Area 1: Working with Employers to Develop and Manage Innovative Partnerships to Reduce Peak Period Commute Trips
- Program Area 2: Working with Commuters to Explore and Utilize Alternative Transportation for Peak Period Commute Trips
- Program Area 3: Working with Public and Private Partners to Collaboratively Develop New Resources and Tools to Expand Transportation Alternatives
- Program Area 4: Strengthening the Organizational Capacity of the Agency to Achieve its Goals

The updated plan splits Program Area 1 into two program areas: Employer Services and Shuttle Program. Each of the other program areas are streamlined to reflect the operating structure that exists in 2015. Brief descriptions of the updated program areas and recommended performance metrics are shown below.

### *Employer Support Services*

Commuter.org works with employers of all sizes and types including private companies, non-profits, schools, and government agencies. The Employer Outreach Team provides no-cost consulting and support services for employers’ transportation coordinators, HR departments and facilities managers. The team’s core work involves providing employers with the information needed to adopt and sustain employee participation in commute alternative programs, such as taking public transit, carpooling, vanpooling, biking and telecommuting.

Working directly with employers allows the agency to leverage those relationships to reach a great number of commuters through a single channel.

With over 4,000 employers in San Mateo County, the Outreach Team also needs to incorporate technology and social media into their arsenal in order to reach as many employers as possible.

The updated Strategic Plan describes the development of self-service toolkits, online training, and peer-to-peer matching services that will allow a small team to expand their reach.

While it is important for the agency to work with as many employers as possible, there is a benefit to having the staff focus their outreach efforts on the larger employers since they represent a greater number of commuters. The updated plan also describes a “top down” approach to new employer engagement.

The Bay Area Commuter Benefits Program is a pilot project that may sunset by 2017. The program requires employers with 50 or more employees in the Bay Area to offer a pre-tax commute benefit program or some other form of employer supported commute benefit. Commute.org has worked with the employers in San Mateo County to register and become compliant with the law. The agency has seen an uptick in employer engagement and a significant rise in employees having more affordable commuting options made available to them as a result of the program. If it were to sunset, then Commute.org might need to take a leading role in getting similar legislation enacted in San Mateo County as well as stepping up to be the administrator of the program if necessary. This possibility should be included in the updated Strategic Plan.

Key metrics for the Employer Support Services program include:

- Employer Status (Active/Maintenance/New/Lost) measurements stratified by employer size
- Employees Represented by Employers in each status category
- Participation rates in various programs (e.g., Emergency Ride Home, Bay Area Commuter Benefits Program) as a percentage of total employers in San Mateo County by size and type

### *Shuttle Program*

The Commute.org shuttle program actually operates as a mini-transit agency that provides first/last mile transportation services during peak commute hours linking commuters and residents to transit stations throughout the county. The Commute.org shuttle program is part of a larger, county-wide shuttle system. The vast majority of Commute.org shuttle passengers are employees who use the service between BART or Caltrain stations and their places of work. Additionally, the shuttles provide “reverse commute” service to residents that live in close proximity to shuttle routes.

Commute.org has traditionally been the lead agency when public and private money are used to fund a shuttle route. Commute.org also manages several routes on behalf of SamTrans and Caltrain where there is no public funding. Additionally, there are several public/private routes in San Mateo County that are managed directly by the private sponsor (e.g., Walmart.com).

In recent years, Commute.org has brought commercial property managers into the shuttle program as route sponsors. This model allows commercial properties to attract tenants by

sponsoring shuttle service to their buildings. This simplifies the consortium management process for the Commute.org shuttle team and provides first/last mile transit service to a new group of employees.

Great strides have been made over the past several years to implement the recommendations that came from the *Shuttle Business Practice Study*. The biennial joint call for projects, new five-year contract for shuttle services, and common branding of all shuttles in the fleet (as of July 1, 2015) puts the shuttle program in a great position to expand to meet the growing demands of first/last mile transit service in San Mateo County. Commute.org has been, and will continue to be, a leader in the shuttle program in San Mateo County.

Key metrics for the shuttle program include:

- On-time performance
- Daily/Monthly/Quarterly/Annual ridership by route
- Rider satisfaction
- Cost per passenger (using public funding as the numerator)
- Public/Private funding ratio

### *Commuter Support Services*

Educating commuters about alternative transportation options and then inspiring and incentivizing them to use them is the objective of this program area. The Commute.org website is the primary vehicle used to disseminate the information and promote the incentives. The updated Strategic Plan describes the use of advertising (online, video, and display), games, and prize-based campaigns to attract and retain the target audience.

- **Direct Communication with Commuters**

The Commute.org website will be re-launched in July 2015 with a new, fresh design. The updated site will also support the inclusion of third-party apps that will provide visitors with the tools they need to help them make non-SOV travel their preferred option when commuting to, from or through San Mateo County.

One of the most important features of the updated site will be the “Where’s my shuttle?” app that will allow shuttle riders to track their shuttles in real-time from their desktop, tablet or smartphone. Inclusion of an interactive transit map and trip planning tool is also planned for the new site.

The Commute.org site currently attracts an average of 10,000 visitors each month, and that number should continue to grow as the agency puts more resources into web-based programming. Additionally, Commute.org’s *Commuter Club* has over 4,000 participants who receive quarterly newsletters and other promotional material.

Metrics include: Website traffic; Commuter Club participation

- **Mode Shift Incentive Programs**

511 Rideshare, which has been the regional coordinator of vanpool programs, will be making major changes to the vanpool program beginning in 2016. It is likely that the Commute.org vanpool incentive program will need to be modified to better align with the regional program. The carpool incentive program is also due for an upgrade. The agency has provided \$60 in gas cards as the incentive for people to form carpools. The agency will replace the gas card incentives with other rewards and will expand the program to try and keep the carpoolers engaged over a longer period of time. The program may also benefit by adding incentives for electric vehicle carpooling, the use of ridesharing apps/services, and ongoing trip logging.

Metrics include: Incentive distributions; Participant retention; GHG emission reductions

- **Try Transit Incentive Program**

For more than a decade, Commute.org has been promoting the Try Transit Incentive Program to encourage commuters to use public transit as an alternative to driving alone. The program provides free transit tickets from transit agencies that operate in and around San Mateo County. Caltrain, SamTrans, BART, and San Francisco Bay Ferry provide complimentary tickets for this program. The program is successful, but is dependent on the support of the transit agencies.

Metrics include: Incentive distributions; Participant retention; Participant engagement

- **School Pool and Carpool to College**

The Commute.org School Pool and Carpool to College programs have been underperforming programs. Both programs need to be reassessed, and will not be included in the Strategic Plan in their current format. Efforts have been made to engage the Safe Routes to School partners in the county as a way to promote the School Pool program, but that effort has not been successful. The Carpool to College program will be fully incorporated into the standard Carpool Incentive program. The updated Strategic Plan will recast both programs.

### *Working with Private and Public Partners*

The Strategic Plan explains the importance of working with a wide variety of partners, both public and private, to expand the breadth and reach of the agency. Great strides have been made since the original document was adopted in having the agency recognized as an important partner in San Mateo County. The updated Strategic Plan needs to expand on the types of partnerships that should be encouraged and the role that Commute.org is best suited for in each type of partnership. For example, depending on the partnership and the alignment of the project to the agency's objectives, Commute.org can be a facilitator, contributing member, advisor, or equal partner.

In evaluating potential projects and partners, the board and staff need to use consistent criteria and be wary of over-committing agency resources. Regional and county-wide partnerships and

programs will typically have priority over city-specific projects; however, the city-specific projects can be used as proof-of-concept and/or pilot projects that might be scalable.

As cities in San Mateo County look for ways to support new housing and commercial developments, there is a strong likelihood that those cities will encourage or mandate the creation of transportation management associations (TMAs) to address the traffic created by the developments. Commute.org has been actively managing one such TMA (San Mateo's Rail Corridor TMA). The agency has found that managing independent TMAs can be very time consuming; therefore, the agency's role in future TMAs should be limited to an advisory capacity.

### *Strengthening the Organizational Capacity of the Agency*

The final program area in the Strategic Plan detailed the activities that the agency should undertake to survive and prosper as a small public agency. Under the guidance and direction of the board and supervisory committee, the staff of Commute.org has steadfastly executed the activities outlined in the plan. One of the stated objectives of the original Strategic Plan was that the agency should continually evaluate its programs and services and refine or eliminate those that are not effective. This objective is even more important now that the range of programs and services in the agency's TDM "toolkit" has expanded.

As a public agency, Commute.org understands the need to be completely transparent in all of its activities. Earning and maintaining the trust of the funders, program participants, and JPA members is not just a goal, but a core requirement of the agency's staff and board at all times.

This program area remains largely intact, but has been updated to reflect the progress that has been made since 2009 and the issues that small public agencies need to address in the future. One new objective for the program area is Succession Planning.

- **Succession Planning**

Commute.org does not currently have a formal Succession Plan. Developing a Succession Plan will help the agency determine what is needed to do to get the best from the staff, to position and educate them so they may best contribute to the agency's and their own long term success, and to assure a flow of competent, well-trained and experienced people for the future. Developing a plan will also help the agency focus on what it takes to ensure employee excellence. As one member of the Task Force described it, "An organization doesn't prosper unless its employees can fuel its success."