San Mateo County Transit District

STRATEGIC PLAN

2009-2013
Acknowledgments

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On behalf of the San Mateo County Transit District Board of Directors and the men and women who serve our community through our family of transit services, we are pleased to present the District Strategic Plan for 2009-2013, a critical blueprint for the agency’s growth, progress and evolution.

This Strategic Plan is the result of in-depth research, extensive internal discussion and thoughtful planning and subjected to vital scrutiny by the public, elected officials and the people at this agency charged with carrying out the missions contained herein.

This also is the first Strategic Plan for the District in many years and is an opportunity to re-think our role in the community as it is influenced by the social changes that are taking place in the region and throughout the nation.

There is a growing desire among many people for a daily life that accommodates social, commercial and residential needs in a manner that maximizes the efficient use of transit and transportation. In short, there is a growing wish for communities that are increasingly walkable, bike-friendly, and transit-oriented.

To meet that desire, we need to expand the vision of this agency to that of a mobility manager. Mobility is the fifth freedom – without the ability to go where we want to go, when we want to go there, none of the other freedoms has real meaning.

In this plan, we begin what will be a continuing effort to explore and expand upon the broadest concepts of what it means to be an employer, a transit provider, a public agency and a partner in providing mobility opportunities and a vision for the evolution of our communities to a new model of living that depends less and less on the automobile.

As such, this plan is meant to be a living document – subject to adjustment as public expectations change and technology provides opportunities that may now be unimaginable.

We struggle with financial constraints, and this plan also reflects the realities we must confront to achieve our vision of a mobile community, free to travel where it wishes as it will.

But our optimism is unbounded and our vision is expansive. This plan will solidify a common mission for all District employees to embrace. This is an exciting time to be at this District, and this plan reflects that excitement and the array of hopes and ambitions the people of our community have for themselves and for the future.

Sincerely,

Michael J. Scanlon
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The San Mateo County Transit District (District) operates the SamTrans bus service, Redi-Wheels paratransit service for persons with disabilities and funds shuttle services that link key employment centers with BART and Caltrain service. The Transit District also is the managing agency for Caltrain and the San Mateo County Transportation Authority. As such, the District has reached a critical milestone. Looking back to the last Strategic Plan prepared in 1985, the District has achieved significant accomplishments, beginning with a vision to bring BART into San Mateo County and to revive commuter rail service along the Peninsula.

The District can be proud of extending BART into San Mateo County and significantly enhancing Caltrain services. Now is the time to look ahead to the many approaching challenges. The District is faced with a growing structural deficit as transportation funding decreases, while transit demand, as well as costs for operations and maintenance, increase at extraordinary rates. The District must set a new course to become sustainable and address the impending needs of the people who live and work in San Mateo County. Additionally, in the larger context of the region’s, state’s and nation’s challenges of tackling the issues of climate change, economic growth and sustainable living, the District must think beyond its local responsibilities and comprehend its contribution to a broader mission.

This Strategic Plan is a policy framework that will guide District investments over the next five years. It focuses on addressing the District’s structural deficit, reinventing the SamTrans family of services, linking transportation and land use investments, evolving business practices, partnering with its communities and investing in District employees to continue to achieve excellence. This plan, in conjunction with the strategic plans already established for Caltrain (2004) and the San Mateo County Transportation Authority (2008), provides a road map to a sustainable business focused on excellent public service.

Within this plan, Chapter 2 provides context about why this plan is necessary, the impetus for change and the challenges to come. Chapter 3 describes the planning process, including internal and external outreach which informed the plan. Chapter 4 is the policy framework of the Strategic Plan which includes the District’s vision and focus areas; and within each focus area, goals, initiatives and example performance indicators. And lastly, Chapter 5 outlines crucial next steps to implementing the plan, which includes prioritizing the initiatives, development and implementation of work plans over the next five years and evaluation of progress timed with the next Strategic Plan update.

Appendices A and B provide a description of the District’s family of services, as well as its key accomplishments over the last several years. Appendix C is the Board-adopted guiding principles which set the stage for the development of the Strategic Plan. Appendix D details public comments and responses by the District.
Looking ahead, the District must focus on addressing the structural deficit and reinventing the District’s family of services.
The District must embrace change and set a new direction. It must develop a strategy to address the District’s structural deficit in order to continue to serve the public and meet the changing and growing needs of the people who live and work in San Mateo County. The District will be able to balance its budget with supplemental revenue sources through 2013. By 2014, the District will have a budgetary shortfall that cannot be covered through supplemental revenue sources (2008-2017 SamTrans Short-range Transit Plan).

The District began in 1976 as a fixed-route bus service, SamTrans. Today, the District has grown into a multimodal system of coordinated transit services, including bus, paratransit, shuttles and rail, each playing an integral role in meeting the transportation needs of the county. The rising costs of providing SamTrans services, coupled with the District’s commitment to additional services without new revenue sources, has resulted in an unsustainable financial condition. Specifically, debt service and the costs associated with the District’s commitment to BART and annual growing contributions to Caltrain are significantly impacting the long-term financial condition of the District.

Looking ahead, the District must focus on addressing the structural deficit and reinventing the District’s family of services. Rail investments were the focus of the last decade. With BART service in San Mateo County, Caltrain Baby Bullet service in operation, and a Caltrain vision that sets the future course, the District needs to focus on long-term financial planning and evolving SamTrans services to meet the growing and changing population and travel needs of those who live and work in San Mateo County.

By 2035, transportation services will need to support a population growth of 139,700 to 861,600 in San Mateo County, over 40 percent of which will be youths and seniors (ABAG Projections, 2007 Series). The senior population will experience the most dramatic growth, by 80 percent, and the youth population will experience steady growth. Both groups will become increasingly important to the growth of the District’s services.

<table>
<thead>
<tr>
<th>County</th>
<th>Population</th>
<th>Households</th>
<th>Job</th>
</tr>
</thead>
<tbody>
<tr>
<td>North</td>
<td>54,400</td>
<td>19,260</td>
<td>90,190</td>
</tr>
<tr>
<td>Central</td>
<td>34,500</td>
<td>14,390</td>
<td>47,220</td>
</tr>
<tr>
<td>South</td>
<td>42,200</td>
<td>14,890</td>
<td>43,660</td>
</tr>
<tr>
<td>Coastside</td>
<td>8,600</td>
<td>3,420</td>
<td>3,580</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>139,700</strong></td>
<td><strong>51,960</strong></td>
<td><strong>184,650</strong></td>
</tr>
</tbody>
</table>

Source: ABAG Projections (2007 series)
Jobs in San Mateo County will grow by 184,650 to 522,000. With the housing and jobs imbalance, long commutes are expected to continue and traffic congestion worsen if the mobility needs of those who work and live in San Mateo County are not accommodated. As reflected in the 2006 Sustainable San Mateo County Indicator Report, public transit ridership increased, but traffic delays also increased. Eleven percent of workers in the county are averaging commuting times in excess of one hour.

By 2035, it is projected that 41 percent of San Mateo County residents will commute out of the county and 40 percent of the in the region will travel into San Mateo County for employment. Only 59 percent of residents will be commuting within the county, one of the lowest rates of in-county commuting in the nine-county San Francisco Bay Area. This rate has not changed significantly over the last 40 years and is not projected to improve between now and 2035 without major improvements to the transportation network.

**TABLE 1: San Mateo County Jobs and Housing Growth Projections (2005-2035)**

<table>
<thead>
<tr>
<th></th>
<th>Jobs</th>
<th>Housing</th>
</tr>
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<tbody>
<tr>
<td>Commute Out</td>
<td>146,167</td>
<td></td>
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<tr>
<td>Commute In</td>
<td>140,807</td>
<td></td>
</tr>
<tr>
<td>Commute Within</td>
<td>206,093</td>
<td></td>
</tr>
</tbody>
</table>

**FIGURE 1: 2035 Inter- and Intra-county Commute Trips**

41% of Residents Commute Out 146,167
40% of Work Force Commute In 140,807
59% of Residents Commute Within 206,093

Source: ABAG Projections 2005
The Strategic Plan was developed over an eight-month period. Phase 1 focused on scoping the plan and establishing the process. Phase 2 included working with staff to develop the key elements of the plan: goals, initiatives and example performance indicators. Phase 3 focused on reaching out internally to all District employees and externally to our partner agencies, customers and the public.

**PARTICIPANTS**

The plan was prepared by District staff with consultant assistance. The Board supported the kick-off of the strategic planning effort in April 2008 and participated in a Board workshop to review the key elements of the plan in October, as well as provided policy direction. Project direction was provided by the District Executive Team. The District Citizens Advisory Committee provided feedback to District staff and the Board. Finally, the draft plan was presented in November and the Board adopted it in December. District staff also was informed by partner agencies and the public at-large.

**DISTRICT STAFF PARTICIPATION**

For the purpose of developing goals, initiatives and example performance indicators, cross-departmental staff members were selected by the Executive Team and assigned to a particular focus area based on their subject matter expertise. The teams’ efforts were informed by the results of the Listening Sessions conducted in 2007 and 2008 involving more than 75 employees. The purpose of the Listening Sessions was to hear employees’ ideas about District priorities and areas of improvement.

**FIGURE 2: Planning Process**

- Board of Directors
- Executive Team
- Citizens Advisory Committee
- Project Team
- Internal and External Outreach
- Financial Integrity
- Multimodal Services
- Transportation and Land Use
- Customers
- Business Practices
- Employees
Rather than being resistant to change, District staff felt change should be embraced.

OUTREACH
After drafting the goals, initiatives and example performance indicators, internal outreach was conducted, which included presentations to:

- Operations Safety Task Force
- Operations Supervisor Academy
- Employee information forums at each of the District’s operations bases: North Base and South Base
- Administrative employees at the District’s central offices

Externally, staff made presentations to:

- Citizens Advisory Committee
- Peninsula Congestion Relief Alliance’s Strategic Planning Committee
- San Mateo City/County Association of Governments Board of Directors
- San Mateo County City Managers’ Association
- Public at-large at a town hall meeting

KEY COMMENTS
The following are key themes that surfaced from the internal and external outreach effort. The public comments and responses can be found in Appendix D.

During external outreach, enthusiasm for the District’s strategic direction was expressed by the District’s partners. There was support for the goals and initiatives, and importantly, support for forming partnerships and reinventing District services. External stakeholders and partners were engaged and willing to work with the District to do what is necessary to improve the transportation network and serve its communities.

During internal outreach, there was a sense that while the District can be proud of many of its accomplishments, it does need to look to the future, ensure its services make sense to the customers, and to acknowledge a greater role in contributing toward sustainability.

Rather than being resistant to change, District staff felt change should be embraced. With that context, specific areas that drew the most attention were the Multimodal Services and Employee focus areas. With the goal of reinventing the District services, there was concern that this should not automatically translate to service and labor reductions, but instead focus on maintaining and improving the current high-quality standard of service. Given the current economic climate, there was concern about the District’s long-term financial stability. In the context of having the resources to implement change, staff felt attention on recruiting and retaining employees and investing in staffs’ professional development would be a critical component to the plan’s success.

Both external and internal audiences inquired about activities after adoption of the Strategic Plan. The overall sentiment was “let’s get going.”
The development of the Strategic Plan highlighted the need to revisit the agency’s vision which states that the San Mateo County Transit District is a leader in providing mobility alternatives that are relevant and desirable. While the District’s mandate is to provide transit services within and through the Peninsula, the challenges and opportunities of the 21st century dictate that it broaden its focus beyond operating transit to addressing mobility management, enhancing people’s quality of life and sustainability.

The new vision is:

The District is a mobility leader, providing transportation choices and a sustainable future that meets the needs of our diverse communities.

Mobility leaders are guided by the principles of mobility management. Mobility management is a comprehensive and innovative approach for managing and delivering coordinated transportation services to customers on an individual basis through a wide range of transportation options and service providers. It focuses on providing a range of transportation options that match the needs of the customer, linking land use and transportation investments, educating and marketing to the customers to influence travel behavior, and solidifying partnerships to maximize transportation investments and efficiencies.

Mobility management is about getting people where they need to go. Just as importantly, it also is a transportation strategy for working towards a sustainable future. Making transportation investments and providing services that maximize travel options will enable people to make sustainable choices about how they move. Influencing individual behavior, which on a collective scale can minimize fuel and energy consumption and pollution, is an essential role that the District must embrace for the future.

### Key Principles of District Mobility Management

- Meet the demand for mobility of specific target groups and influence pre-trip mode choice.
- Provide information on a variety of modes of transportation to the user and maximize awareness of transportation options.
- Meet mobility needs via an efficient and integrated use of transportation and land use infrastructure.
- Create alliances with different partners, a vital factor for improving transit access and creating a sustainable transit environment.
- Address people’s attitudes to influence travel choices.
- Anticipate, monitor and take action to mitigate and/or take advantage of external factors, such as demographic trends and economic forecasts.
- Achieve long-term financial stability to provide the levels of investment that meet the growing demand for transportation services.

Source: Federal Transit Administration’s United We Ride Program.
In order to achieve the vision, the District will need to make progress in the following six focus areas:

- Financial Integrity
- Multimodal Services
- Transportation and Land Use
- Customers
- Business Practices
- Employees

The Financial Integrity focus area addresses the District’s need to look beyond annually balancing its budget to long-term financial stability by addressing the District’s structural deficit. This approach will focus on financially stabilizing the District as it wrestles with the demands to provide more service to its evolving customer base while contending with uncertain levels of funding from state and federal sources and volatile energy and economic markets.

The Multimodal Services focus area addresses the need to provide people with mobility options and reduce dependence on vehicle trips. Multiple modes of reliable and integrated transportation services are essential to meet the diverse range of mobility needs. The District cannot do this alone. It is imperative for the District to solidify and establish new public and private partnerships for the purposes of enhancing the multimodal transportation network.
Making smart transportation investments is linked to focused growth, which is addressed in the Transportation and Land Use focus area. The District does not control land use and it will not strive to. The District makes transportation investments which demand coordinated decision-making with local jurisdictions. Appropriate land-use decisions will be encouraged to support focused development opportunities that will be tied to transit services to support regional and county growth, balance housing and jobs, and ultimately provide people with choices that contribute to a sustainable lifestyle. With volatile fuel prices and heightened consciousness about the negative environmental effects of private auto use, people are open to making lifestyle changes to preserve the environment for the future.

The Customers focus area reflects why the District exists. The District’s overriding purpose is to serve customers, including existing passengers, potential riders, as well as the communities throughout the District’s service area. While striving for high customer satisfaction through quality service, the District also will focus on strengthening its relationship with the communities, which will prove mutually beneficial. People who work and live in San Mateo County will understand how to maximize their use of District services. And, the District’s investment and operating decisions will benefit from the communities’ input and support.

The Business Practices and Employee focus areas address internal matters that set a high standard for conducting responsible business practices. While sustainable policies and practices will be established, the District also will advance enhanced technologies and procedures to support the expanded role of the District while maximizing operational efficiencies. Investment in employee development is a must and will continue with the goal of achieving continual improvement. The employees are the backbone of the District and attracting and retaining quality employees is essential for growth and change.
GOALS, INITIATIVES, PERFORMANCE INDICATORS

Goals, initiatives and example performance indicators are outlined for each of the six focus areas. The goals give overall policy direction, while the initiatives define how the goals can be achieved. The initiatives are not resource constrained and collectively reflect a comprehensive and balanced approach to addressing the goals. The example performance indicators give a sense of how progress can be measured in terms of effort as well as effectiveness. After adoption of the Strategic Plan, the initiatives will be prioritized and specific performance indicators defined and measured.
Addressing the structural deficit will be a significant task for the District as it has historically focused on balancing the budget annually.

Financial Integrity
Addressing the structural deficit will be a significant task for the District as it has historically focused on balancing the budget annually. This will involve maximizing revenues and controlling costs while actively promoting dedicated funding for transportation. These are ongoing activities to be coupled with a significant undertaking involving the reinvention of the District’s family of services. The focus will be to structure the District’s services in a way that maximize efficiencies and fare revenue while continuing to meet the needs of our transit-dependent customers.

Goals
- Address the District’s structural deficit
- Financially support the District’s reinvention of its family of services
- Promote funding for transportation at the federal, state, regional and local levels of government

Initiatives
- Identify methods to minimize financial commitments outside the core business
- Increase cost efficiency
- Develop partnerships with employers and other private entities to subsidize complementary services
- Develop a funding plan which integrates capital and operating sources to support the reinvention
- Maximize funding for transit, transportation infrastructure, transit-oriented development, and sustainability programs at the state and federal levels of government
- Work in partnership with the Metropolitan Transportation Commission to maximize regional funding for San Mateo County
- Partner with local jurisdictions, businesses and non-profit agencies to leverage local funding

Example Performance Indicators
- Revenue to expense ratio
- Credit rating
- Investment in District’s service reinvention
- Amount of funding from other sources
- Number of legislative programs/initiatives
The Multimodal Services focus area addresses the need to provide people with mobility options and reduce dependence on vehicle trips.

**Multimodal Services**

Major corridors in San Mateo County such as El Camino Real serve as the backbone of the multimodal transportation network. There are gaps in the system and connectivity is less than optimal. Challenges to significantly improve network connectivity include coordinating among multiple jurisdictions and service providers. Efforts in this area focus on reinventing the District’s fixed-route services, improving connectivity between transportation systems, and advancing the multi-jurisdictional coordination efforts such as the Grand Boulevard Initiative and Senior Mobility in partnership with other agencies. This will be a significant undertaking for the District and a key strategy to addressing the District’s financial structural deficit.

**Goals**

- Create a regional network of multimodal transportation options
- Reinvent the District’s services
- Ensure compatibility between the District and Caltrain strategic visions

**Initiatives**

- Conduct a Comprehensive Operations Analysis to establish a basis for change
- Along El Camino Corridor, develop a service plan in conjunction with the Grand Boulevard Initiative
- Develop intra-city service models that can be used as prototypes countywide
- Develop a capital improvement program that includes state-of-good repair, safety, customer service and enhancement projects to support the District’s services
- Form local and regional partnerships to integrate the District’s family of services with complementary services by other providers
- Ensure a service network that addresses the growing mobility needs of senior citizens, customers with disabilities and low-income patrons
- Maximize connectivity between all modes of transportation

**Example Performance Indicators**

- Service productivity and effectiveness i.e., cost, ridership, farebox recovery, revenue miles
- Number of transportation partners
Transportation agencies must understand and encourage land-use decisions as they affect the efficiencies of the transportation network.

Initiatives

- Develop District TOD policy
- Develop District policy linking transit service levels with land-use densities
- Continue to build support for the GBI vision and guiding principles which include transit-oriented development, economic investment and housing opportunities to create a livable and walkable El Camino Real corridor
- Expand the District TOD program
- Leverage TOD funding

Example Performance Indicators

- Ridership
- Number of station area or major transit center area plans completed
- Number of TOD projects
- Dollar amount of District and leveraged funds for TOD
- Community Livability, i.e. number of transportation and land-use policies supported by the District, non-auto mode share
- Number of conferences, speaking engagements and acknowledgements

Transportation and Land Use

Linking transportation and land-use decisions is a key element of mobility management, which is a new area for transportation agencies. Cities and counties control land use and should continue to do so. Transportation agencies must understand and encourage land-use decisions as they affect the efficiencies of the transportation network. This focus area emphasizes the need to respect and partner with local land-use jurisdictions to encourage transit-supportive land-use investments in focused development areas. It also defines the District’s responsibility to serve as an example, locally and nationally.

Goals

- Create livable corridors and community centers that enhance transportation choices
- Form partnerships to implement joint land-use and transportation investments
- Set a local and national example for linking transportation and land-use planning
The District needs to understand customers’ transportation needs to and from home and throughout the day.

**Customers**

The District needs to start thinking about its customers in a new way. Thinking about customers when they are on the system and providing them with quality service is a given. It needs to expand its efforts beyond the traditional scope and make efforts to influence people’s mode choices. The District needs to understand customers’ transportation needs to and from home and throughout the day. This focus area also emphasizes the need to build relationships with communities, who are made up of the District’s neighbors, existing customers, potential new riders and supporters.

**Goals**

- Be transparent, educate and inform communities and partners
- Maximize customer satisfaction
- Attract and retain new riders

**Initiatives**

- Launch an external branding and awareness campaign
- Develop a communications strategy focused on education
- Incorporate community outreach efforts into District projects and initiatives
- Evolve the Customer Service Center into a service information clearinghouse
- Develop signage/information guidelines for transit stops and stations
- Provide real-time information at key transit stops and stations
- Enhance the customer notification process
- Monitor customer satisfaction with regular surveys
- Establish business partnerships to attract new riders
- Invest in marketing campaigns to influence mode choice

**Example Key Performance Indicators**

- Customer satisfaction, i.e. on-time performance, cleanliness, information access, satisfaction rate
- Customer contact, i.e. Web hits, customer service call volume
- Ridership
- Effectiveness of dollars spent on communication campaigns measured in terms of increased ridership
- Number of meetings and community outreach events
- Community support
Evolving the District’s business practices will depend heavily on building a team with a sense of common mission.

**Business Practices**

This focus area reflects the importance of evolving the District’s business practices and technologies to those that are sustainable and maximize efficiencies. Becoming sustainable is easier said than done. Efforts must be made to embrace sustainability as it is the District’s corporate responsibility to address the needs of the future. Maximizing efficiencies will involve integrating smart technology into its business practices. The focus here will be to match the vision, goals and needs of the District to the appropriate level of technology investment. Evolving the District’s business practices will depend heavily on building a team with a sense of common mission.

**Initiatives**

- Develop a sustainability policy
- Study the concept of reorganizing the District to provide mobility management services
- Refine the District’s organizational plan
- Develop a technology master plan that embraces business best practices and maximizes employee performance
- Provide leadership and team building training for managers
- Conduct District-wide meetings and departmental “open houses”
- Develop new cross-departmental coordination processes
- Redesign the intranet to improve cross-departmental communication

**Example Performance Indicators**

- Employee satisfaction rate
- Amount and effectiveness of investment in internal business infrastructure
- Sustainability indicators, i.e. percent progress of sustainability projects/initiatives, carbon footprint
- Number of business process improvements
- Rate of Depot (intranet) usage

**Goals**

- Create a culture of environmental stewardship and sustainability
- Build teamwork and a sense of common mission
- Evolve business practices to support mobility management services
Develop a comprehensive employee wellness program
• Improve work space and common area conditions
• Enhance District reward programs to encourage innovative ideas
• Structure evaluations to promote accountability and reward outstanding performance
• Provide employees with the technology and resources to maximize productivity
• Expand the District’s professional development program
• Define career ladders and succession plans

Example Performance Indicators
• Employee satisfaction, i.e. overall satisfaction rate, understanding of District goals, learning and development opportunities
• Retention rate
• Average length of time to hire staff
• Percentage of employees participating in professional development programs
• Number of internal promotions
• Number of awards to staff
• Cross-departmental information sharing

Employees
The District is a service provider, but service cannot be delivered without employees. The District is setting new direction, but change cannot be achieved without employees. Employees are the backbone of the agency and investment in their development must continue while encouraging continued excellence. Attracting and retaining employees also will be a key element of this focus area, taking into consideration the cost of living in the region and the challenge of retaining public sector employees within a competitive labor market.

Goals
• Attract and retain quality employees
• Encourage excellence and innovative thinking
• Invest in employees’ professional development

Initiatives
• Develop recruitment strategies linked to the District’s purpose and goals
• Continue to provide a competitive District compensation and benefits package
• Enhance the District’s flexible work policies

Employees are the backbone of the agency and investment in their development must continue while encouraging continued excellence.
This plan is focused on providing a policy framework for making investment decisions and guiding our collective efforts. The development of initiatives was not resource constrained to encourage out-of-the-box thinking in addressing the significant challenges to come. It also is clear that resources are limited and that all of the initiatives cannot be implemented at once.

Following adoption of the plan, the District will focus on developing a five-year work program, which will prioritize and phase the initiatives. Over the course of five years, select work plans will be implemented. Some will be internally advanced and some will have significant public involvement depending on the nature of the initiative. As work plans are advanced, specific performance indicators will be established to monitor performance.

This is a living document that must be updated as the operating environment changes. With each update of the plan, the policy framework will be reviewed for relevancy and adjusted as necessary. Specific performance measures will be identified and used to track the District’s progress and effectiveness. The result is a Strategic Plan which outlines the District’s common purpose and mission, with its employees working together to achieve the vision.
Appendix A

SAN MATEO COUNTY TRANSIT DISTRICT SERVICES

In 1974, the District was formed to consolidate 11 separate city bus systems in San Mateo County. It began operating service in 1976. During its first decade, the District’s focus was providing fixed-route bus and paratransit services. Starting in the 1980s, the District’s role began to change. With the continued growth of the San Francisco Bay region and evolving need for transportation investments and coordination, the District evolved into a multimodal operator of bus, shuttle, paratransit and commuter rail services and an administrator of the Measure A half-cent sales tax. The District operates three business units as described below.

SamTrans

SamTrans provides fixed-route bus services throughout San Mateo County and into parts of San Francisco and Palo Alto. It also provides demand-responsive paratransit service and funds shuttles. Twenty-four percent of the fixed-route customers are youth riders, 60 percent are adults, and 16 percent are seniors and customers with disabilities.

The fixed-route bus system consists of 54 routes serving about 50,000 passengers on a typical weekday, with an annual ridership of 14 million. Paratransit service (Redi-Wheels and RediCoast) includes 76 buses, vans and sedans that are supported by supplemental taxi service and serves approximately 1,000 mobility-impaired patron trips on a typical weekday. Shuttle services includes nine employment shuttles in San Mateo County that travel to and from BART stations, as well as two community shuttles which travel from residential areas to retail and recreation destinations. The shuttle program has an average weekday ridership of 2,000.

The SamTrans Board of Directors is made up of nine members. The County Board of Supervisors appoints two of its own and one individual having transportation expertise, to the District board. The city mayors in the county elect three city councilmembers, who each represent one of the three judicial districts, to the District Board. These six members then select three members of the general public to serve on the Board, one of which must be a coastside resident. SamTrans has established a Citizens Advisory Committee and an Accessibility Advisory Committee. The San Mateo County Paratransit Coordinating Council also provides input to the Board.

Caltrain

Caltrain provides services to 32 stations along 77 miles with a mix of local, limited and express trains. Average weekday ridership is 44,800. Annual systemwide ridership is about 11.9 million. Caltrain also provides shuttle services between stations and employment sites in both San Mateo and Santa Clara counties. Thirty-one weekday commute-hour shuttles and one weekend shuttle provide services to approximately 5,000 riders.
The Peninsula Corridor Joint Powers Board (JPB), which operates Caltrain, is comprised of three member agencies: San Mateo County Transit District, Santa Clara Valley Transportation Authority (VTA) and San Francisco Municipal Transportation Agency (SFMTA). The Board receives input from a staff coordinating council made up of representatives from the three member agencies; a Citizens Advisory Committee comprised of citizens from the counties served; and the Accessibility Advisory Committee comprised of Caltrain riders with disabilities and representatives of people with disabilities. The District serves as the managing agency for Caltrain, which includes oversight of the contract operator. Amtrak is the contract operator responsible for providing train service, maintaining Caltrain equipment, verifying fares, and providing station maintenance.

**San Mateo County Transportation Authority**

The San Mateo County Transportation Authority (TA), staffed by the District, was formed in 1988 to administer the Measure A program, a 20-year countywide half-cent sales tax to fund transportation projects in the county. Over the life of the measure, the TA provided $1.1 billion in local tax dollars which was used to leverage an additional $1.2 billion in state and federal dollars, totaling $2.3 billion in transportation infrastructure investments. In 2004, county voters reauthorized Measure A, which will run from 2009 through 2033. The new 25-year program is estimated to result in more than $3 billion of investment into San Mateo County’s transportation infrastructure and services. The TA Board of Directors is comprised of elected officials representing the cities in the county, the County of San Mateo and the San Mateo County Transit District. A 15-member Citizens Advisory Committee representing a broad spectrum of interests and geographic areas of the county provides regular input to the Board of Directors.
Appendix B

KEY ACCOMPLISHMENTS

Over the last decade, there were significant challenges and opportunities for planning and providing transportation services for the people who live and work in San Mateo County and the region. The District has operated in an environment of shrinking transportation resources from all levels of government, facing growing needs to simply maintain and operate its existing transportation infrastructure in an unpredictable economy. In spite of these challenges, the District focused on maximizing mobility options for the people who live and work in San Mateo County with the larger purpose of enhancing the people’s quality of life and sustainably developing its community and economy. Notably, the District’s key accomplishments during the last decade focused on new and enhanced rail services, providing quality bus, paratransit and shuttle services, evolving the District’s role into a mobility manager and extending the Measure A Program to sustain local investments in transportation.

New and Enhanced Rail Services

In 1985, the District had a vision to bring BART to San Mateo County and partnered with BART to fund and provide the service. In 2003, BART began operating service to the new South San Francisco, San Bruno, San Francisco International Airport and Millbrae stations. The project cost approximately $1.6 billion and now provides approximately 40,000 passenger trips a day. In 2007, the District and BART forged an agreement resulting in BART assuming full responsibility for the operations of the BART extension.

When Caltrain service came under local control in 1992, it was operating 60 weekday trains. Moving forward to June 2004, Caltrain introduced Baby Bullet commute-hour express service that provided commuters with a less than one-hour trip between San Francisco and San Jose. Currently, Caltrain operates 98 trains per weekday. Unique to what other transit agencies were experiencing at the time, Caltrain experienced a 60 percent increase in ridership since 2003. Today, Caltrain carries a record year-to-date average of 44,800 passengers on a typical weekday.

The District’s Evolving Role

SamTrans focused on providing quality bus, shuttle and paratransit services, especially affordable transit services to its transit-dependent customers. SamTrans focused on on-time performance, customer satisfaction and cleanliness while maximizing cost efficiencies, maintaining its levels of service and sustaining its ridership base.

The District also developed and advanced three new programs in the areas of mobility management: the Grand Boulevard Initiative, Senior Mobility Initiative and Transit-oriented Development Program. Mobility management is a comprehensive and innovative approach for managing and delivering coordinated transportation services to customers on an individual basis by providing a wide range of transportation options and service providers and linking land use and transportation investments.

San Mateo County Transit District / Strategic Plan 2009-2013
The Grand Boulevard Initiative is a partnership between transportation agencies, 19 cities and the business community. The focus is to transform El Camino Real, the major transit corridor on the Peninsula, into a livable corridor. This initiative and voluntary partnership signals a significant commitment to link transportation and land use decisions to achieve a common vision as a place for residents to work, live, shop and play, creating links between communities that promote improved quality of life.

The Senior Mobility Initiative and Action Plan is the work of a broad coalition of entities such as human service agencies, cities and community centers in San Mateo County, with leadership from the District to develop mobility options for seniors transitioning from driving to alternative transportation modes. Efforts to date have focused on providing information and education. The next phase of work will focus on providing one-on-one customer service to seniors coordinating transit resources and services to maximize efficiencies. The goal is to provide programs and services that can help seniors stay mobile, active and connected to the community.

The Transit-oriented Development (TOD) Program is focused on developing District, JPB and TA property with high-density land uses that will maximize transit ridership and minimize regional auto trips. The first TOD project was completed in 2005 -- the 153-unit La Terraza Apartments project near the Colma BART Station and SamTrans transit center. The District is now advancing several TOD projects. Key efforts are focused on the San Carlos Transit Village project, a 280-residential unit development along El Camino Real at the San Carlos Caltrain Station; and at the Colma BART Station where the District is in the process of partnering with the City of Daly City to determine the optimal mix of office, retail and residential development for the site.

San Mateo County Measure A Program
The San Mateo County Transportation Authority (TA), staffed by the District, was formed in 1988 to administer the Measure A program, a 20-year countywide half-cent sales tax to fund transportation projects in the county. Over the life of the measure, the TA provided $1.1 billion in local tax dollars which was used by to leverage an additional $1.2 billion in state and federal dollars, totaling $2.3 billion in transportation infrastructure investments. In 2004, county voters reauthorized Measure A, which will run from 2009 through 2033. The new 25-year program is estimated to result in more than $3 billion of investment into the San Mateo County’s transportation infrastructure and services.
Appendix C

**DISTRICT GUIDING PRINCIPLES**

The Guiding Principles adopted by the Board in 2004 provided the basis for the Policy Framework of the District Strategic Plan.

- Compete in markets where we can be competitive, giving priority to the most cost-effective services.
- Sustain basic mobility services for transit-dependent and low-income persons.
- Continue the District’s reputation of service quality and provide relevant transit choices to customers.
- Utilize the most effective mix of services and amenities to maximize ridership and perform ongoing, proactive monitoring of productivity.
- Maintain financial strength and integrity in order to continue to operate the District’s family of services.
- Lead the way in making transit investments where there is transit supportive land use and reach out to cities, employers, and other local and regional partners regarding community development.
- Focus on meeting the transit needs of partners, including the business community, who establish transit-supportive programs and policies.
- Improve transit connections by coordinating with other transit operators and with local transportation services.
- Continue to be an employer of choice that attracts and retains competent, able employees.
- Work with businesses to create awareness of transportation choices.
Appendix D

**PUBLIC COMMENTS**

Below are the comments that were received during the public comment period, as well as District responses.

### General

<table>
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<tr>
<th>Public Comments</th>
<th>Responses</th>
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| Is there enough staff to carry out the vision? | Post plan adoption, initiatives will be prioritized. The prioritization will take into account staff and financial resources in the current and future years.  
Prioritization of customer-related initiatives should utilize the following criteria: (1) customer satisfaction; (2) customer service; and (3) safety and efficiency. Consider more than one public outreach meeting. | This suggestion will be considered during the prioritization process after the plan has been adopted. The public outreach process included one town hall, four stakeholder, two SamTrans CAC, and four District Board meetings. Additional outreach activities will take place for specific initiatives after the plan is adopted. |

### Financial Integrity

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<th>Public Comments</th>
<th>Responses</th>
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<td>Work together as a coalition for more federal funding.</td>
<td>This issue is addressed broadly in the Financial Integrity focus area with the initiative to seek more federal, state and regional funding for transportation. Partnerships will be critical to the successful implementation of this initiative.</td>
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### Multimodal Services

<table>
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<th>Public Comments</th>
<th>Responses</th>
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<td>Cost-effectiveness is a really important factor that needs to be considered for long-term stability of providing services.</td>
<td>The District agrees that cost-effectiveness will need to be considered in future planning and is listed as one of the performance indicators. The focus of the plan is on coordinating transit services for the purpose of creating a multimodal network of transportation options for our customers. Consolidation of multiple transportation agencies in the region is beyond the scope of the District Strategic Plan. Caltrain is currently assessing the feasibility of accommodating more bicycles on the system.</td>
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<tr>
<td>There are multiple public transit service providers in the Bay Area. Should there be a look to consolidate them?</td>
<td>Various approaches to maximizing transit ridership will need to be considered to meet the goals of the strategic plan. Specific solutions will be developed through the implementation of initiatives outlined in the plan.</td>
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<tr>
<td>Increase the bicycle seating available on Caltrain.</td>
<td></td>
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<td>Caltrain ticket should not expire in two months.</td>
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<tr>
<td>Consider congestion pricing to get people out of their cars.</td>
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### Multimodal Services continued

**Public Comments**

**Service Connectivity**
Service connectivity is a big issue. East-west connectivity needs to be improved, and north-south connectivity reevaluated.

Be mindful of smaller cities and their transportation needs, including the coast.

How are you going to keep ridership on the system? It needs to get people where they need to go.

Look at the whole system, not just in high-density areas.

Better integration of the train and bus service is needed.

Service provided by the Alliance has been growing. At some point, they may need to serve as route incubators and “hand off” service to SamTrans once they grow beyond a certain point. Therefore the Alliance should be a partner as the COA is developed.

**Services to Youths**
Schools are leading cause of traffic.

Build points of interest near schools so transit can serve schools and points of interest.

Lobby governments to encourage transit service to schools.

**Transportation and Land Use**

**Public Comments**

The Housing Leadership Council (HLC) would like to commend the District on its draft Strategic Plan. HLC supports linking transportation and land use as vital to developing a livable community.

**Responses**

Youths are important customers for the District. Youth transportation needs and travel behavior will be a key input in the development of the Comprehensive Operations Analysis initiative.

**Customers**

**Public Comments**

Clearly distinguish between goal of educating the public and being transparent and inclusive related to District business decisions.

Integrate the fare collection system (Translink).

Make it easier to get commuter checks.

Consider NextBus technology at stations.

**Business Practices**

**Public Comments**

Make the sustainability policy the primary goal.

Who is the energy “czar”?

**Responses**

This issue will be addressed in the Multimodal Services focus area with the initiative to undergo a Comprehensive Operational Analysis. Also, focusing on developing partnerships for a multimodal network will need to be a strategy used to address the connectivity issue.