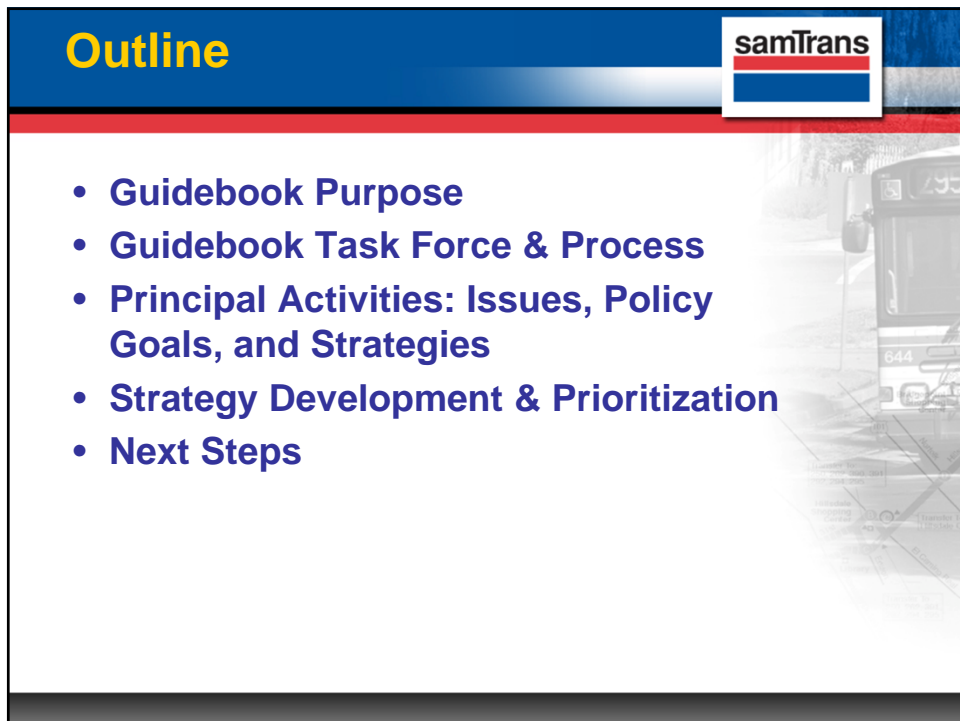# San Mateo County Shuttle Business Practices Guidebook

Board of Directors
February 8, 2012

Outline

- **Guidebook Purpose**
- **Guidebook Task Force & Process**
- **Principal Activities: Issues, Policy Goals, and Strategies**
- **Strategy Development & Prioritization**
- **Next Steps**

Guidebook Purpose

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- **"White Paper" to identify key issues facing the shuttle program**
- **Develop best practice strategies to improve coordination in key areas:**
  - Planning
  - Funding
  - Operations/Administration
  - Marketing/Public Information
- **Provide a framework to move strategies towards implementation**

Guidebook Purpose – Response to Initial Questions

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- **Soliciting feedback from the four boards and addressing next steps**
- **No defined timeline yet**
- **Supports a framework for individual strategies that will come forward to the boards as future pieces of work. Example strategies: calls for projects and coordination on customer information**

Shuttle Business Practices Task Force

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- **A Task Force was formed to develop guidebook structure, content and recommendations**
- **Represented agencies included:**
  - **San Mateo County Transportation Authority**
  - **SamTrans**
  - **Peninsula Traffic Congestion Relief Alliance**
  - **City/County Association of Governments**
- **Stakeholder interviews included employers, funders, and operations and administrative staff**

Process

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Identify Key Issues → Identify Policy Goals → Identify Strategies & Strategy Champions → Identify Barriers → Prioritize Each Strategy → Develop Draft Guidebook

Principal Activities

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Date	Activity
Spring 2011	Stakeholder interviews conducted
June 2011	Key issues and potential policy goals discussed
July 2011	Key issues and policy goals confirmed
August 2011	Draft business practice strategies discussed
September 2011	Business practice strategies confirmed
September 2011	Strategy champions confirmed and barriers to implementation discussed
November 2011	Draft Guidebook and Guidebook Development report discussed

Strategy Development and Prioritization

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- **Multiple strategies, immediate priorities**
- **All strategies will be advanced over time**
- **Proposed strategies were ranked and prioritized by:**
  - **Return on Investment**
  - **Level of Effort**

Strategy Rankings Matrix

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| Tier 2: High Return, High Effort | Tier 1: High Return, Low Effort |
| Tier 4: Low Return, High Effort | Tier 3: Low Return, Low Effort |

Planning

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Issue	Shuttle planning is typically based on available funding, with a limited understanding of market potential
Policy Goal	Develop a consistent countywide planning process that includes a market-based approach
Strategies	Develop and adopt a planning document for entities involved in shuttle planning
	Develop and adopt consistent planning criteria to assess potential market demand (e.g. ridership, cost effectiveness)
	Undertake periodic market research studies
Tier 1	Engage SamTrans/Alliance in planning process for all entities
Tier 1	Define roles and responsibilities of stakeholders in the planning process

Planning

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Issue	The improvement process for under-performing routes is not clearly defined.
Policy Goal	Define the process to address under-performing routes.
Strategies	Develop phased improvement plan - Tie improvement plan to funding framework and require improvement plan as part of funding process. - Define minimum and ideal performance standards by service type (commuter and community shuttles, respectively)
	Seek board approval on performance standards (for reducing or cancelling service).
	Identify relevant technical assistance role and parties responsible.
	Aggressively work with route sponsor to address under-performing routes.

Planning

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Issue	Robust employer participation in the shuttle program is limited.
Policy Goal	Develop complementary TDM (transportation demand management) strategies to support shuttle program.
Strategies	Conduct outreach to determine potential support for adoption of TDM ordinance and/or Transportation Management Associations to support shuttle operations and complementary alternative modes.
	Develop and market TDM strategies that are specifically targeted at reducing congestion and providing first/last mile mobility solutions.

Planning

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Issue	The funding process consists of multiple funding sources, calls and match requirements.
Policy Goal	Establish consistent and clear funding process.
Strategies	Develop clear funding framework to define process, establish key scoring criteria, define roles and responsibilities and determine eligibility for funding.
	Consolidate funding program under one entity.
Tier 1	**Conduct single funding call.**
	Assign specific weighting for local match in evaluation process.

Funding

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Issue	Reporting requirements differ by funding source, while no uniform performance monitoring process is applied across shuttle programs.
Policy Goal	Develop consistent performance criteria and systematic performance monitoring program.
Strategies Tier 1	**Adopt single set of performance metrics for commuter and community shuttle programs, respectively.**
Tier 1	**Reassess and refine performance metrics.**
	Develop and adopt systematic shuttle performance monitoring program.
	Develop validation program to assure data accuracy.

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Operations & Administration

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Issue	Several entities perform similar operations, management, procurement and administrative roles.
Policy Goal	Explore opportunities to consolidate responsibilities.
Strategies	Conduct a study to assess the cost and benefit of consolidation or realignment related to: - Shuttle Operations - Shuttle Administration - Shuttle Procurement

Marketing & Public Information

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Issue	Provision of coordinated regional transportation information integrating shuttle information is limited.
Policy Goal	Explore the potential for centralizing and coordinating regional transportation information.
Strategies	Work with regional transportation portals (such as 511.org) to augment existing shuttle service information (schedule, routes, service change notifications).
	Develop comprehensive information portal dedicated to shuttle service in San Mateo County.
	Work with local municipalities and Chambers of Commerce to augment existing website information with shuttle links.

Marketing & Public Information

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Issue	Marketing budgets are constrained.	
Policy Goal	Ensure sufficient marketing resources for shuttle programs to be successful.	
Strategies		
Tier 1	Allocate portion of annual operating budget to on-going marketing activities for community shuttles.	
Tier 1	Develop mechanism to tie funding call to City or employer participation in marketing (e.g. if commuter shuttle).	

Marketing & Public Information

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Issue	Shuttle vehicles, stations, and marketing materials lack a consistent brand identity.
Policy Goal	Explore potential for brand consistency.
Strategies	Develop common look and feel of county shuttles.
	Produce common marketing materials.
	Explore opportunity to consolidate marketing activities.
	Create a brand name scheme for county shuttles with easily identifiable signage.

Next Steps

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- **Seek support for Guidebook Strategies and Concepts**
- **Staff work to advance strategies:**
  - **Engage Task Force to help advance the strategies**
  - **Finalize Guidebook**
  - **Procure funding for strategy implementation and/or ongoing costs**

Contact Information

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