

San Mateo County
TRANSIT DISTRICT



**STRATEGIC
PLAN**

**SamTrans Board of Directors
August 2, 2023**

Chelsea Schultz, Principal Planner, SamTrans Strategic Planning



Agenda

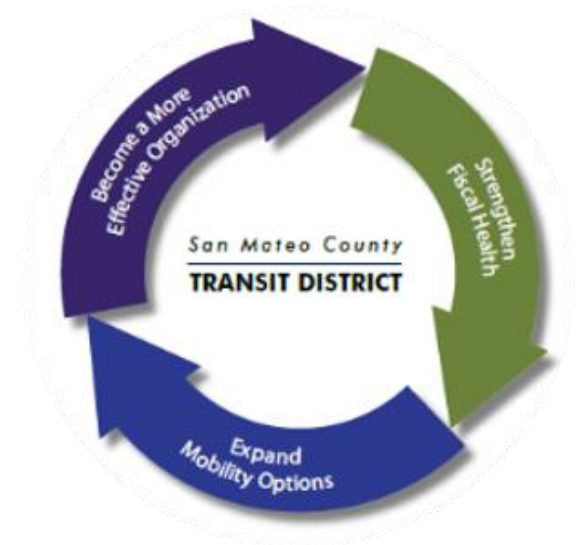
1. Background
2. Project Overview
3. Engagement Plan
4. Schedule
5. Next Steps



Background

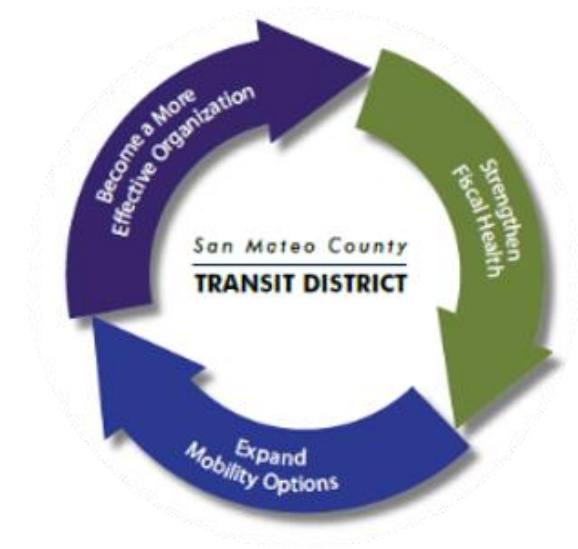
What is a Strategic Plan?

- A strategic plan is a policy blueprint representing the foundation from which policy, investment, and service decisions should be made:
 - Defines the organization's vision, mission, core values, challenges, and opportunities
 - Establishes goals and measures performance
 - Helps the organization create its future rather than just react to it
 - Helps to integrate and align projects, programs and investments with strategic vision
 - Better aligns organization with its stakeholders



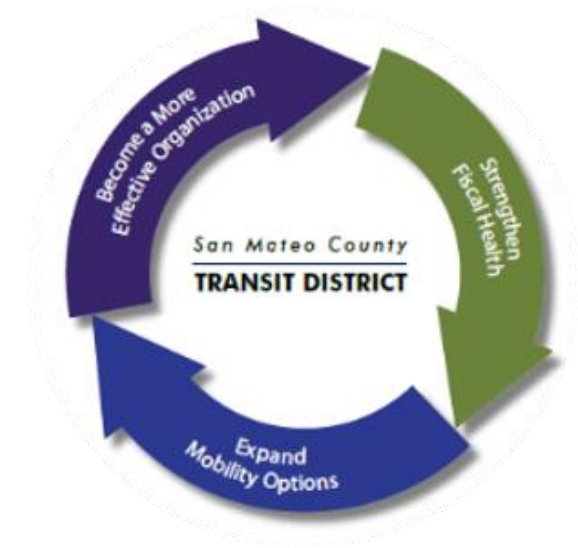
Background – Why do we need a new Strategic Plan?

- Most recent District Strategic Plan was adopted in 2014 and covered 5-year period (2015-2019)
 - 3 priorities: Become an effective organization, strengthen fiscal health, expand mobility options
- Major Strategic Accomplishments:
 - Measure W (2019)
 - Reimagine SamTrans (2022)
 - Caltrain Governance MOU (2022)



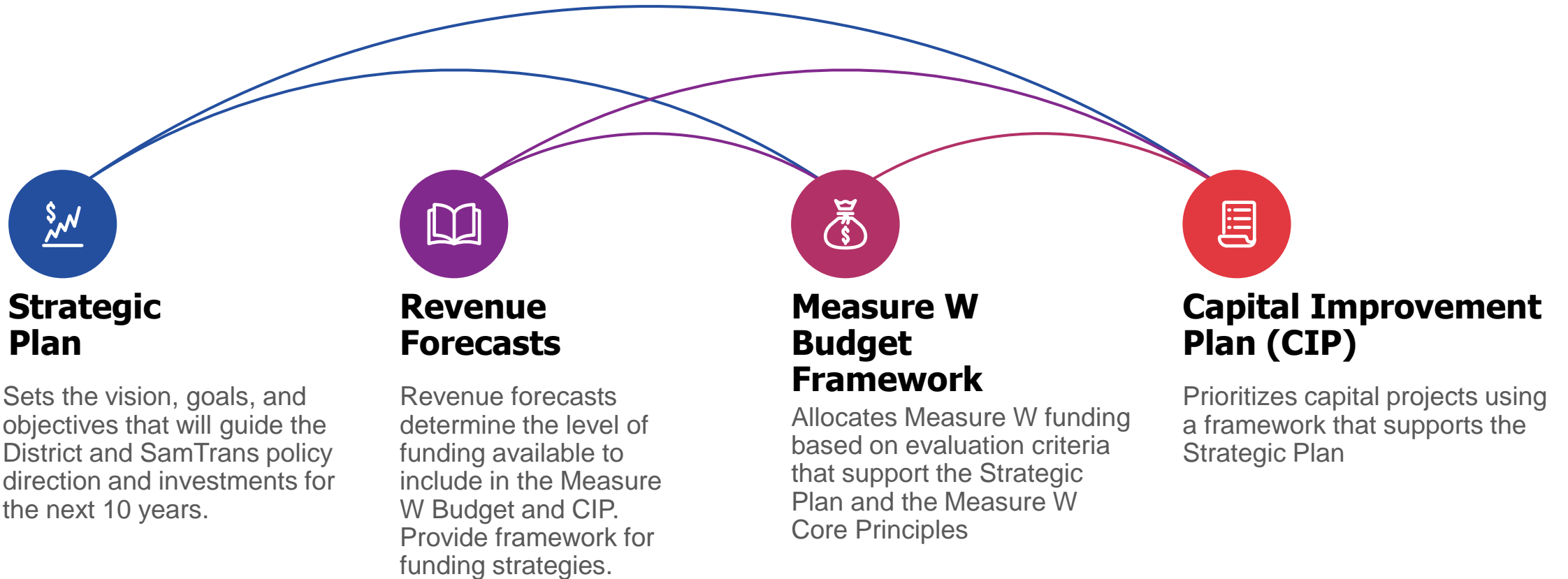
Background – Why do we need a new Strategic Plan?

- Initiatives in SamTrans 2018 Business Plan complete or underway
- CIP development – currently lack strategic vision to align capital project list and priorities around
- Changing travel patterns and workforce trends - challenges and opportunities



Project Overview

Project Components and Objectives



2025-2035 District Strategic Plan

Objective: Provide a clear strategic direction, mission and vision for the future of the District and SamTrans

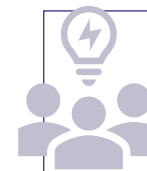
- The Strategic Plan **will** cover:
 - The District as a workplace / employer
 - The District as a managing agency
 - SamTrans service delivery and investments
- And **will not** cover:
 - Caltrain service vision, delivery and investments
 - Strategic vision for TA or Express Lanes JPA
 - Development of investment plans for major projects or service delivered by Caltrain, TA, or Express Lanes JPA



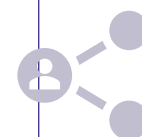
Identify trends and best practices, conduct partner & peer agency interviews



Develop mission, vision, core values, goals, objectives, and actions



Conduct workshops with executive team and Board




Staff in-reach and stakeholder outreach




Revenue Forecasts


Objective: Develop high-level financial model to support the Strategic Plan, Measure W budget framework, and Capital Improvement Program



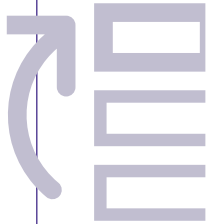
Develop and/or refine financial model and validate assumptions



Develop up to two revenue scenarios



Identify opportunities for efficiency and potential new revenue sources



Align priority and scheduling of major projects / initiatives with available annual funding

SamTrans Measure W Budget Framework and Capital Improvement Program (CIP)

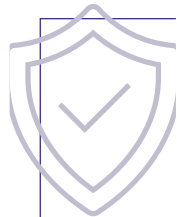
Objective: Develop 10-year investment roadmaps aligned with Strategic Plan



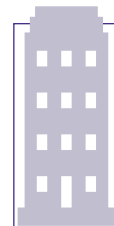
Prioritized list of projects, programs, and initiatives



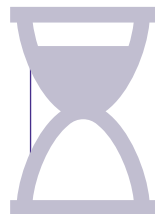
Constrained to projected annual funding identified in revenue forecasts exercise



Measure W Budget Framework: Consistent with Get Us Moving Campaign and Core Principles



CIP: Both District (shared services, HQ), and SamTrans capital investments



Completed in time for FY26-27 budget cycle



Engagement Plan

Employee Engagement Highlights



- Two rounds of employee engagement – scoping and draft plan feedback
- Examples of engagement activities:
 - Employee surveys
 - Internal project website
 - Interviews and listening sessions
 - Office hours at bases
 - Town Hall and ad hoc presentations
- Two rounds of Board and Executive Team Workshops



External Engagement Highlights



- Partner Agency Interviews
- Stakeholder Groups
 - Citizen Advisory Committee
 - Accessibility Committees
 - Stakeholder Advisory Group
 - Technical Advisory Group
- Public
 - One public meeting for draft plans
 - Alert riders/customers via social media

Schedule

Project Schedule

Summer and Fall 2023	Winter 2023/24 and Spring 2024	Summer and Fall 2024	Winter 2024/25
<ul style="list-style-type: none"> • Revenue Forecasts Data Collection • Establish framework for Strategic Plan, Measure W Budget, CIP • Round 1 Engagement – Scoping • 1st Round of ET & Board Workshops 	<ul style="list-style-type: none"> • 1st Round of ET & Board Workshops cont • Continue Revenue Forecasts • Draft Strategic Plan, Measure W Budget, and CIP • Round 2 Engagement – Draft Feedback 	<ul style="list-style-type: none"> • Round 2 Engagement cont • 2nd Round of ET & Board Workshops • Revise and Finalize Strategic Plan, Measure W Budget, and CIP 	<ul style="list-style-type: none"> • Board Adoption • SamTrans Call for Budgets FY26-27



Next Steps

Next Steps

- Board and Executive Workshops
 - Strategic Plan mission, vision, goals (fall 2023)
 - Measure W Budget Framework and CIP (early 2024)
 - Draft Plans (summer 2024)
- Periodic updates at regularly scheduled Board meetings

San Mateo County
TRANSIT DISTRICT



**STRATEGIC
PLAN**

Thank you! Questions?

Project Team:

Millie Tolleson, tollesonm@samtrans.com

Chelsea Schultz, schultzc@samtrans.com

Asiya Patel, patella@samtrans.com

