

San Mateo County
TRANSIT DISTRICT



**STRATEGIC
PLAN**

**Citizens Advisory Committee
August 30, 2023**

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Agenda

1. Background
2. Project Overview
3. Engagement Plan
4. Schedule



Background

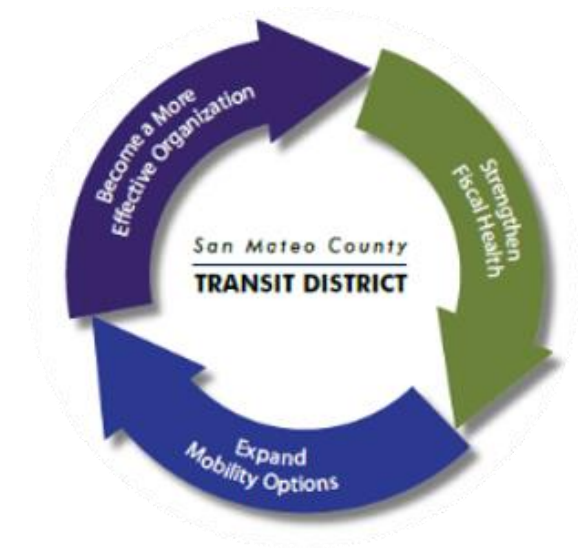
What is a Strategic Plan?

- 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
- Opportunity to align projects and investments around strategic vision and goals (capital projects, Measure W projects)
- Changing travel patterns and workforce trends - challenges and opportunities



Project Overview

2025-2035 District Strategic Plan

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

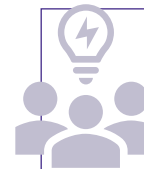
- The Strategic Plan **will** cover:
 - SamTrans service delivery and investments
 - The District as a workplace / employer
 - The District as a managing agency
- And **will not** cover:
 - Caltrain service vision, delivery and investments
 - Strategic vision for TA or Express Lanes JPA
 - Development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



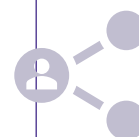
Identify trends and best practices, conduct partner & peer agency interviews



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



Conduct workshops with executive team and Board



Staff in-reach and stakeholder outreach



What does the project include?



Strategic Plan

Sets the vision, goals, and objectives that will guide the District and SamTrans policy direction and investments for the next 10 years.



Revenue Forecasts

Revenue forecasts determine the level of funding available to include in the Measure W Budget and CIP. Provide framework for funding strategies.



Measure W Budget Framework

Allocates Measure W funding based on evaluation criteria that support the Strategic Plan and are aligned with Measure W Core Principles



Capital Improvement Plan (CIP)

Prioritizes capital projects using a framework that supports the Strategic Plan

Engagement Plan

Engagement Plan



- **Two rounds** of engagement – scoping and draft plan feedback
- Employee engagement activities
- Partner and Peer Agency Interviews
- Stakeholder Group Meetings
 - Citizens Advisory Committee
 - Accessibility Committees
 - Stakeholder and Technical Advisory Groups
- One virtual community meeting to provide feedback on draft Strategic Plan

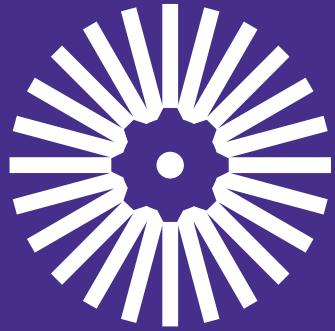
Schedule

Project Schedule

| Now through Winter 2023/24 | Spring and Summer 2024 | Fall and Winter 2024 |
|---|---|---|
| <ul style="list-style-type: none">• Data Collection and Revenue Forecasts• Best Practices and Trends Research• Peer and Partner Agency Interviews• Round 1 Engagement – Scoping• 1st Round of Executive & Board Workshops• Draft Strategic Plan framework (mission, vision, goals) | <ul style="list-style-type: none">• Develop Draft Strategic Plan• Round 2 Engagement – Draft Feedback• 2nd Round of Executive & Board Workshops | <ul style="list-style-type: none">• Revise and Finalize Strategic Plan, incorporating feedback from Round 2 Engagement• Board Adoption• SamTrans Call for Budgets FY26-27 |



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Thank you! Questions?

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