

*San Mateo County*  
**TRANSIT DISTRICT**



**STRATEGIC  
PLAN**

---

**Citizen Advisory Committee  
District Strategic Plan**

11/29/2023

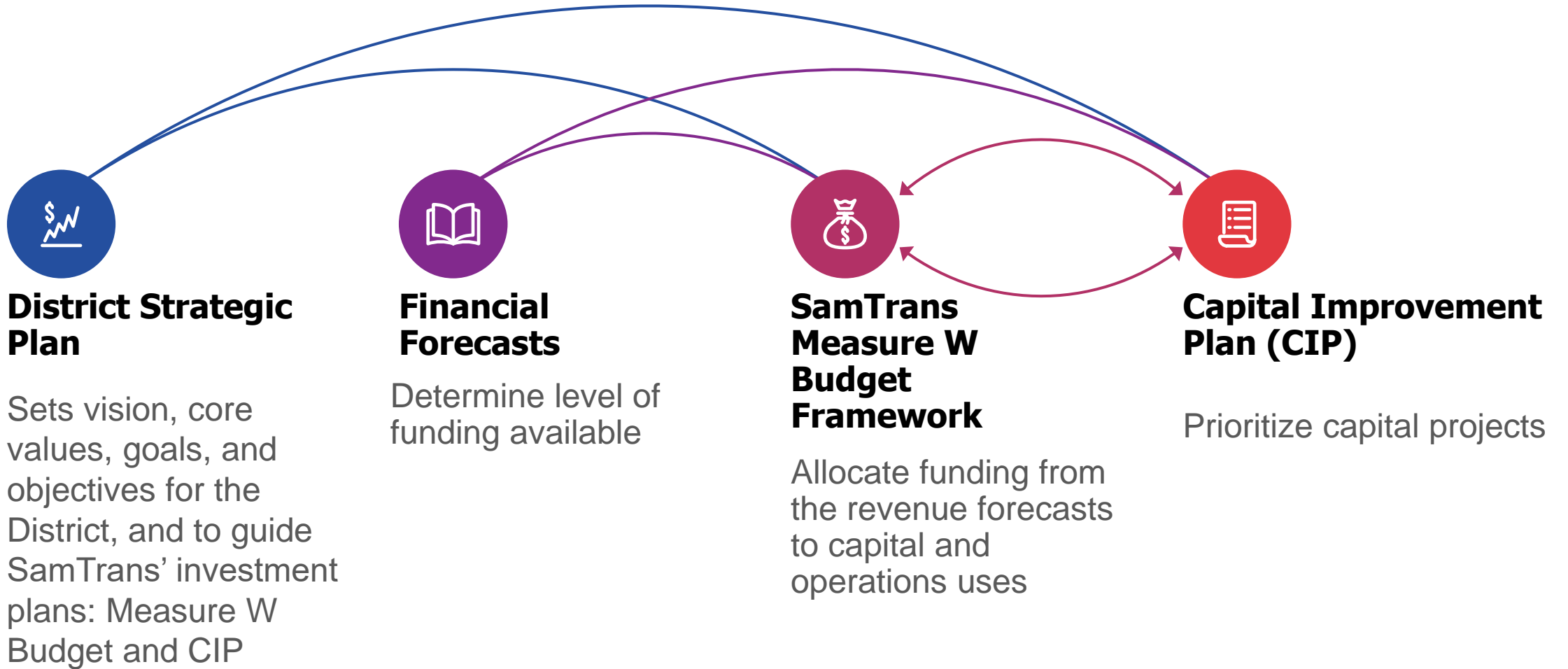


# Strategic Plan Agenda

|   |  |
|---|--|
| X | <b>Strategic Plan Project Components and Process (5 minutes)</b> |
| X | <b>Context Setting &amp; Reactions (15 minutes)</b>              |
| X | <b>Activity: Strategic Assessment (25 minutes)</b>               |



# Project Components



*Sustainability and Resilience woven into all project components*

# What is the District Strategic Plan?

---

## Purpose

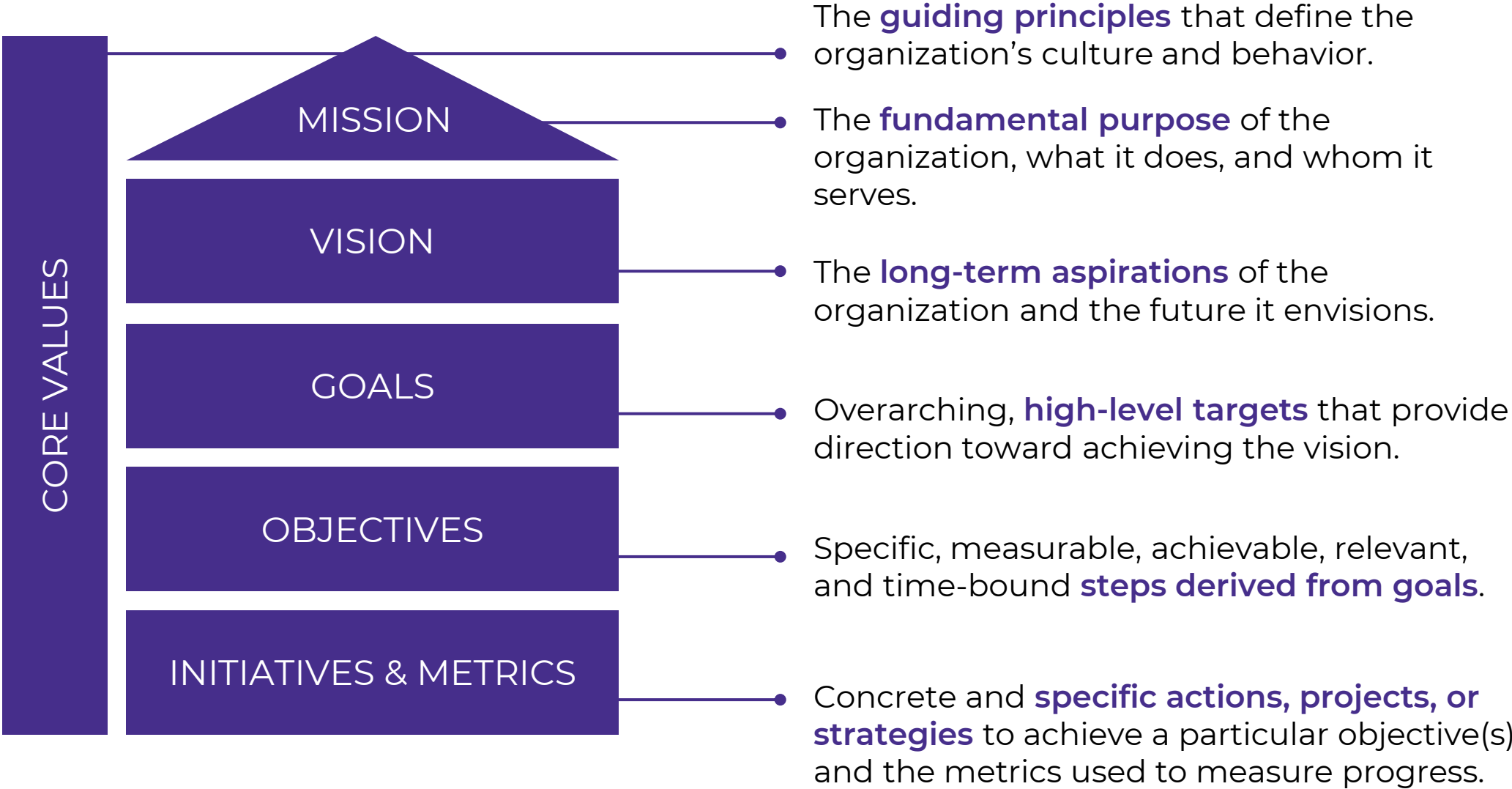
- Provide **strategic direction** organizationally and programmatically
- Align all District's plans, programs, and services to achieve a **common vision**
- Account for **changing travel patterns** and workforce trends
- Help guide Measure W Budget Investments and CIP

---

## Scope

- The District as a **workplace and employer**
- The District as a managing agency **overseeing Shared Services**
- The District as a **leader of sustainability in the region**
- SamTrans **service delivery** & investments

# Strategic Plan Framework



# District Strategic Plan Project Milestones



**Two rounds** of engagement:  
 (1) Scoping and (2) Draft Plan Feedback

- Employee engagement activities
- Partner and peer agency interviews
- Stakeholder Group Meetings:
  - Citizen Advisory Committee
  - Accessibility Committees
  - Stakeholder Groups
  - Technical Advisory Groups

**One** virtual community meeting in Spring 2024

## **Context Setting:**

- **Travel Trends**
- **Customer Expectations**
- **Key Interviews**
- **Employee Survey**



# Travel Trends

- A greater share of post-pandemic travel occurs at **off-peak periods**
- **Telecommuting remains prevalent** post-pandemic for a certain population
- Rents are rising faster than incomes, **impacting current and future ridership**
- Regionally, bus ridership is recovering more quickly than other transit modes, in **alignment with national trends**
- SamTrans ridership has **steadily recovered since April 2020** but remains below pre-pandemic levels





# SamTrans Customer Profile & Expectations

- Post-pandemic riders are more likely to be youth or Riders of Color, are increasingly low income (making less than \$50,000) and less likely to speak English very well
- Fewer SamTrans riders have access to a vehicle compared to 2019
- 2019 Market Research found that SamTrans riders wanted to see:
  - Improved connections
  - Real-time information
  - Faster service with fewer stops
  - Bus priority infrastructure
  - Improved stop amenities
- MTC's Transit Transformation Action Plan found customer expectations in 2021 were consistent with those expressed in 2019

**Sources:** SamTrans Triennial Survey (2021), MTC On Board Survey (2022), Reimagine SamTrans Market Research (2019), Bay Area Transit Transformation Action Plan, MTC (2021)

# Key Takeaways

## *Interviews with Partner Agencies, Peer Agencies, & Thought Leaders*

- Transit agencies need to clearly articulate their purpose and goals beyond a Covid-19 recovery
- Auto-centricity and other land use patterns (zoning, economic development) are at odds with transit
- Travel patterns in San Mateo County are perceived as not in line with current transit network
- Customer preferences for frequency & reliability, safety/security, and cleanliness remain consistent
- There is inherent tension between regionalism and localism across Bay Area operators, with varying views on how to address funding and governance issues
- The role of transportation in climate change is recognized with an increasing sense of urgency to get more people on transit
- A focus on El Camino Real and Dumbarton corridors was recommended by partners

# Key Takeaways

## Employee Survey

- **326** survey responses
- **Positive responses** are related to job satisfaction and peers
  - **82%** of respondents strongly agree or agree that their job is **interesting and challenging**
  - **81%** of respondents strongly agree or agree that the people they work with **treat each other with respect**
- **Poorly rated statements** are related to respondents' interactions with the District including:
  - There is open and honest communication throughout the District (25% disagree or strongly disagree)
  - They have received the training they need to do their job well (18% disagree or strongly disagree)
  - The Executive Team values them as their most important resource (18% disagree or strongly disagree)

# Key Takeaways

## *Department Interviews*

- Workforce hiring and retention is the most critical issue
- Facilities are inadequate for current and future needs
- Better clarity on Shared Services is needed
- Processes, including procurement, updating legacy technology systems, need to be streamlined
- Improved collaboration across departments is overwhelmingly desired
- Need for greater safety focus
- Team camaraderie and the people have been described as the most successful and rewarding part of working at the District



# Activity: Strategic Assessment

# Sticky Note Exercise

---

- Thinking about what we just learned about the state of the transit industry and our organization...
- **Take 10 minutes** to use sticky notes to write down any strengths, weaknesses, opportunities, and threats for the District
- Place the notes on each respective category board
- We will regroup, discuss, clarify or expand if needed

# Sticky Note Exercise

|   |  |
|---|--|
| <p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"><li>• What do you think are our strengths at the District?</li></ul>                                    | <p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"><li>• What weaknesses may hinder success at the District?</li></ul>             |
| <p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"><li>• What opportunities do you think are available to the District in the next 10 years?</li></ul> | <p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"><li>• What factors may pose a challenge to success in the next 10 years?</li></ul> |

# Sticky Note Exercise

---

- **Regroup (10 minutes)**
- Report out, discussion, clarify/expand



# Dot Voting Exercise

---

## What should the District focus on over the next 10 years?

- **Review** the list of initiatives displayed on the screen
- **Think** about which initiatives the District should focus on in the next 10 years
- **Vote** for up to **three** priorities using the dots that are provided to you

- Improve transit speed and reliability
- Improve rider experience
- Increase transit ridership
- Innovative transit technology
- Seamless regional transit
- Services for youth
- Services for seniors and people with disabilities
- Services for equity priority communities
- Sustainable transit fleet and facilities



## Dot Exercise Initiatives



## Next Steps

- Project team will incorporate feedback from internal and external stakeholders, to help inform Strategic Plan objectives and initiatives
- Develop draft Strategic Plan Framework
- Next round of stakeholder outreach will be in Spring/Summer 2024



**STRATEGIC  
PLAN**

**Thank you!  
Questions?**

---

Project Management Team

Millie Tolleson, [tollesonm@samtrans.com](mailto:tollesonm@samtrans.com)

Chelsea Schultz, [schultzc@samtrans.com](mailto:schultzc@samtrans.com)

Asiya Patel, [patella@samtrans.com](mailto:patella@samtrans.com)

