

San Mateo County
TRANSIT DISTRICT



**STRATEGIC
PLAN**

Draft Strategic Plan and Update on Capital Improvement Plan and Measure W Ten-year Plan

Informational Item
October 9, 2024, Board Meeting

MOVING SAN MATEO COUNTY: **San Mateo County Transit District's 10-Year Strategic Plan**

FY 2026 - 2035



**DRAFT
August 2024**

Agenda

1. Strategic Plan Overview
 - Purpose and Scope
 - Development Process and Employee Engagement
2. Strategic Plan Framework
3. Implementation, Evaluation and Reporting
4. Update on CIP and Measure W 10-Year Plans
5. Next Steps



Strategic Plan Overview

What is a Strategic Plan?

A strategic plan is a **roadmap** for the future

- Defines where an organization wants to go and how to get there
- Establishes priorities and guides investment decisions

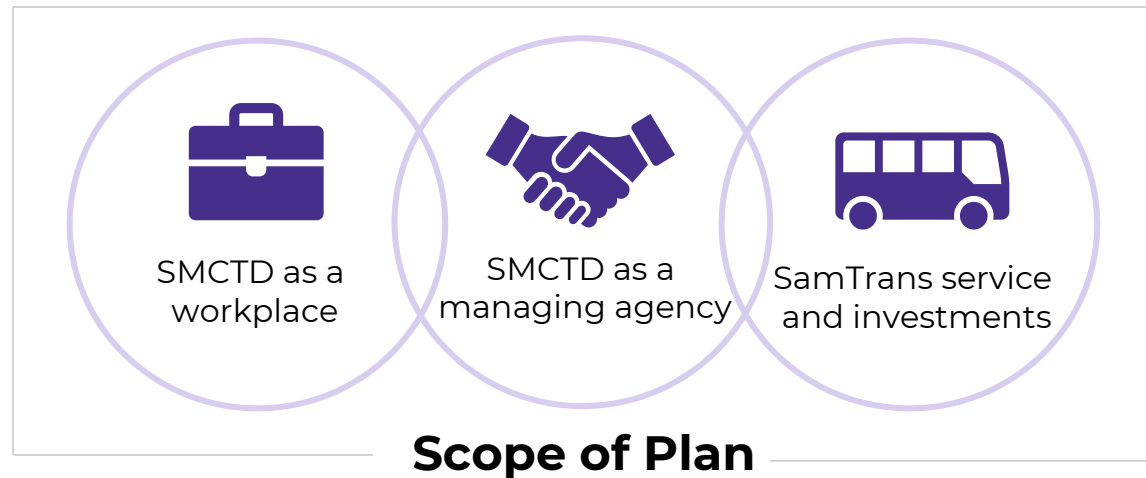
Why do we need a **new** strategic plan?

- Previous District Strategic Plan covered 2015-2019. Major achievements since then include:
 - SamTrans Business Plan (2018)
 - SMCTA Strategic Plan (2019)
 - Caltrain 2040 Service Vision / Business Plan (2020)
 - Measure W (2018) and Measure RR (2020) passage
 - JPB Governance MOU (2022)
 - Reimagine SamTrans (2019-2024)



Purpose and Scope

- **Provide strategic direction** organizationally and programmatically for fiscal years 2026-2035
- Align all District's plans, programs, and services to achieve a **common vision**
- Account for changing travel patterns and workforce trends
- Guide development of **Measure W** and **Capital Improvement** Plans



Not Included

Service vision or investments for Caltrain, Transportation Authority, Express Lanes Joint Powers Authority



Development Process



Employee Engagement



Employee survey

Conducted an in-depth employee survey to measure employee satisfaction. Garnered a 40% response rate.



Frontline worker listening sessions

Held listening sessions at both north and south bases to note what is important to frontline workers.



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Employee Engagement



Employee events

Conducted two rounds of in-reach at District-wide employee events like Party on the Roof, Wellness Week and E-Bike Day.



Voting exercises

Used dot voting exercises to engage employees, seek input and help prioritize draft objectives and initiatives



Strategic Plan Framework



Vision and Mission



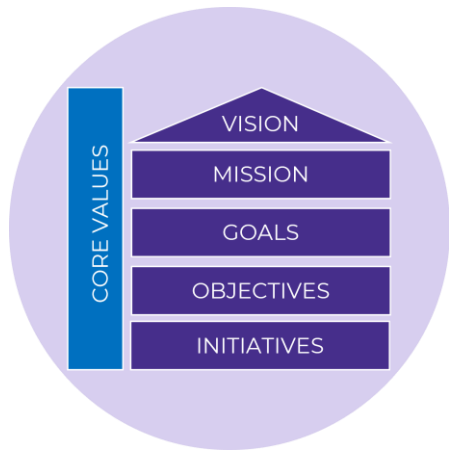
Vision

The District provides an exceptional mobility experience for the people and communities in San Mateo County.



Mission

Working together to revolutionize mobility and create a more equitable and sustainable region.



Core Values

Equity

Delivering equitable access to opportunities for our communities and our employees to live and thrive

Excellence

Delivering high-quality service for our customers, investing in our employees, and securing our financial future

Innovation

Demonstrating eagerness and support to try new things, take calculated risks, and adapt to changing conditions

Partnership

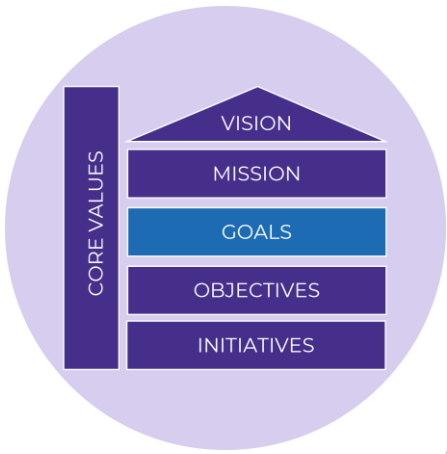
Building trust, exercising empathy, working as a team, and collaborating with external partners

Safety

Cultivating a culture of safety and well-being of our people and customers

Sustainability

Creating a sustainable & resilient environmental future for the agency and people in the region



Goals

1

Deliver Better Mobility Services

Expand and invest in sustainable transportation options to better meet mobility needs, reduce emissions, and improve equity.

3

Become an Employer of Choice

Create an employee experience that is meaningful, inclusive, attracts talent, and is built on trust.

5

Ensure Effective Management

Provide sufficient flexibility, resources, and staffing to support the effective delivery of all transportation services for agencies under the district umbrella.

2

Provide Outstanding Customer Experience

Deliver a superior transit experience that captivates riders, fosters loyalty, and nurtures trust.

4

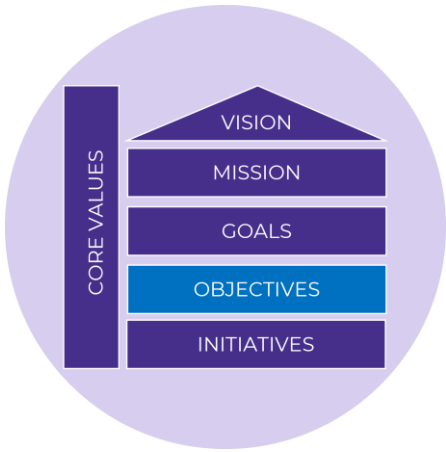
Lead Responsibly

Build a fiscally responsible, accountable, and highly effective organization.

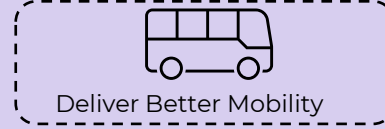
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Exercise Collective Efforts

Collaborate across the region to improve transit and land use in service of greater mobility.



Objectives (Sample)



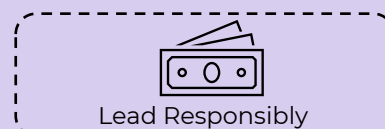
Experiment and respond to changing transportation landscape



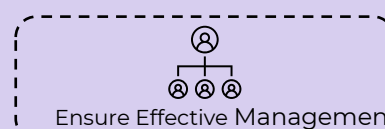
Improve the transit and paratransit rider experience



Provide a safe and modern workplace for all District employees



Improve internal collaboration and tools to increase effectiveness



Improve outcomes for Shared Services

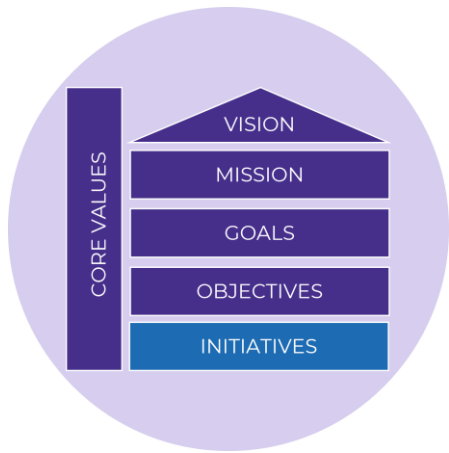


Collaborate to improve local and regional transit

See Strategic Plan for additional objectives



Implementation, Evaluation and Reporting



Initiatives

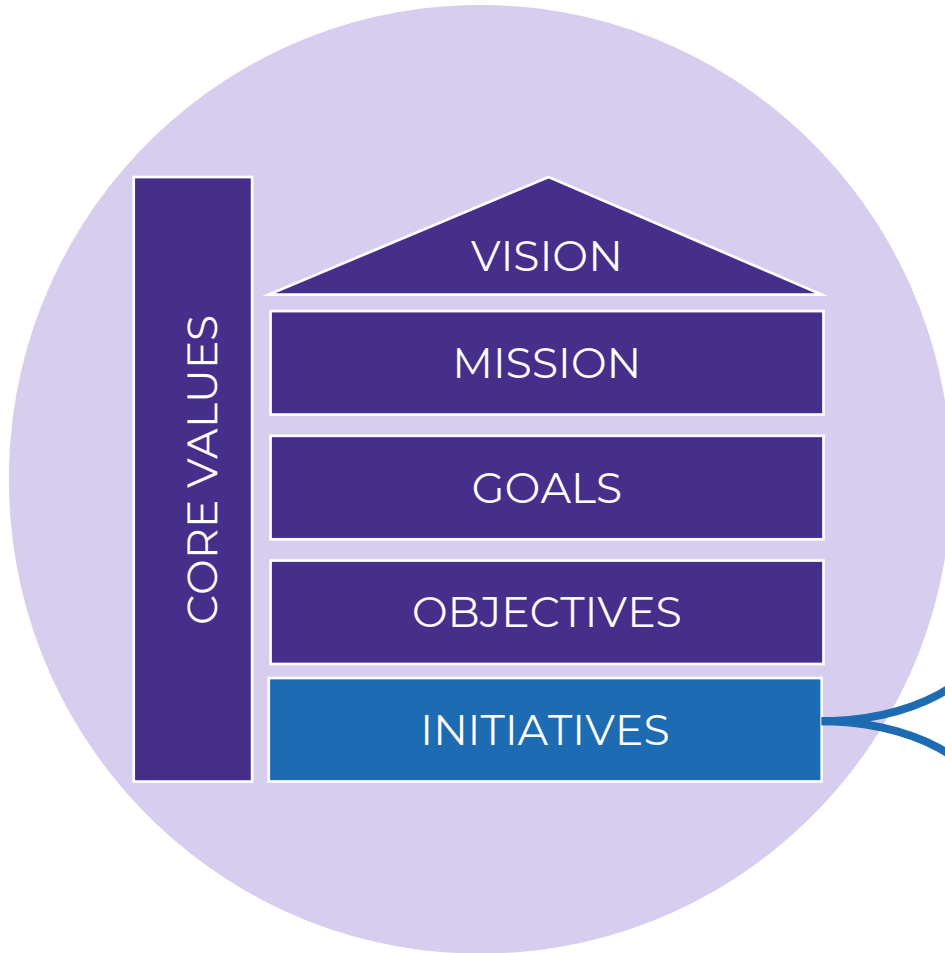
- Strategic plan includes 50+ initiatives
- Initiatives are concrete and specific **actions** we will take to **implement** the strategic plan and achieve the objectives, goals, and vision
- Developed through extensive input from District staff, including departmental interviews and executive workshops.

Objective 1A: Improve and expand existing SamTrans services

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
1A.1	Invest in new or existing service in core corridors	<ul style="list-style-type: none"> • Recommendations from the El Camino Real (ECR) Bus Speed & Reliability Study are implemented • Additional studies (e.g., Countywide Transit Priority Study, Dumbarton Busway Feasibility Study, ECR Mid County Transit and Multimodal Corridor Plan) are completed • Dumbarton Busway Project is completed and operational • Performance metrics could include: <ul style="list-style-type: none"> • Number of transit priority improvements delivered and external funding secured • Ridership, on-time performance and travel time • Customer satisfaction
1A.2	Adapt service to new travel patterns and increase service for key markets	<ul style="list-style-type: none"> • Market study is completed • Performance metrics could include: <ul style="list-style-type: none"> • Ridership, on-time performance and travel time • Increase in service offered in key markets / equity priority areas • Customer satisfaction
1A.3	Evaluate and consider refinement or expansion of on-demand services	<ul style="list-style-type: none"> • Evaluation report with Key Performance Indicators (KPIs) developed and implemented • Performance metrics could include: <ul style="list-style-type: none"> • Ridership, customer satisfaction, wait time, etc
1A.4	Invest in resilience, improvement, and state of good repair for existing infrastructure	<ul style="list-style-type: none"> • Enterprise Asset Management (EAM) system is implemented and utilized • North and South Base Condition Needs Assessment Study is completed and projects are defined • SOGR and resilience projects are programmed into Capital Improvement Program (CIP) and operating budgets • Deferred maintenance is reduced

See Appendix A for example progress indicators and performance metrics for each initiative

Acting on the Initiatives: Next Steps



ASSIGN DEPT LEAD: Takes primary responsibility for driving and overseeing implementation. Responsible for coordinating across supporting departments.

ESTABLISH TIMEFRAMES: Estimated timeframe for start and completion of initiative, over the course of years 1 through 10 (FY26-35), aligned with final CIP and Measure W 10-Year Plans

IDENTIFY METRICS OF SUCCESS: The metrics (and baselines) that specifically drive understanding of progress and/or completion of the specific initiative. *Initial thinking is documented in Appendix A.*

Building Momentum and Evaluating and Reporting on Progress

- Socialize strategic plan across the District to all levels of employees
- Integrate strategic plan into District processes
 - Integrate with employee performance management system, new hire orientation, etc
 - Align capital and operational spending with strategic plan priorities during budget process
- Evaluate and Report on Progress
 - Annual progress report to evaluate progress, reflect on outcomes, adjust where necessary, define next steps
 - Comprehensive review and update at the five-year mark



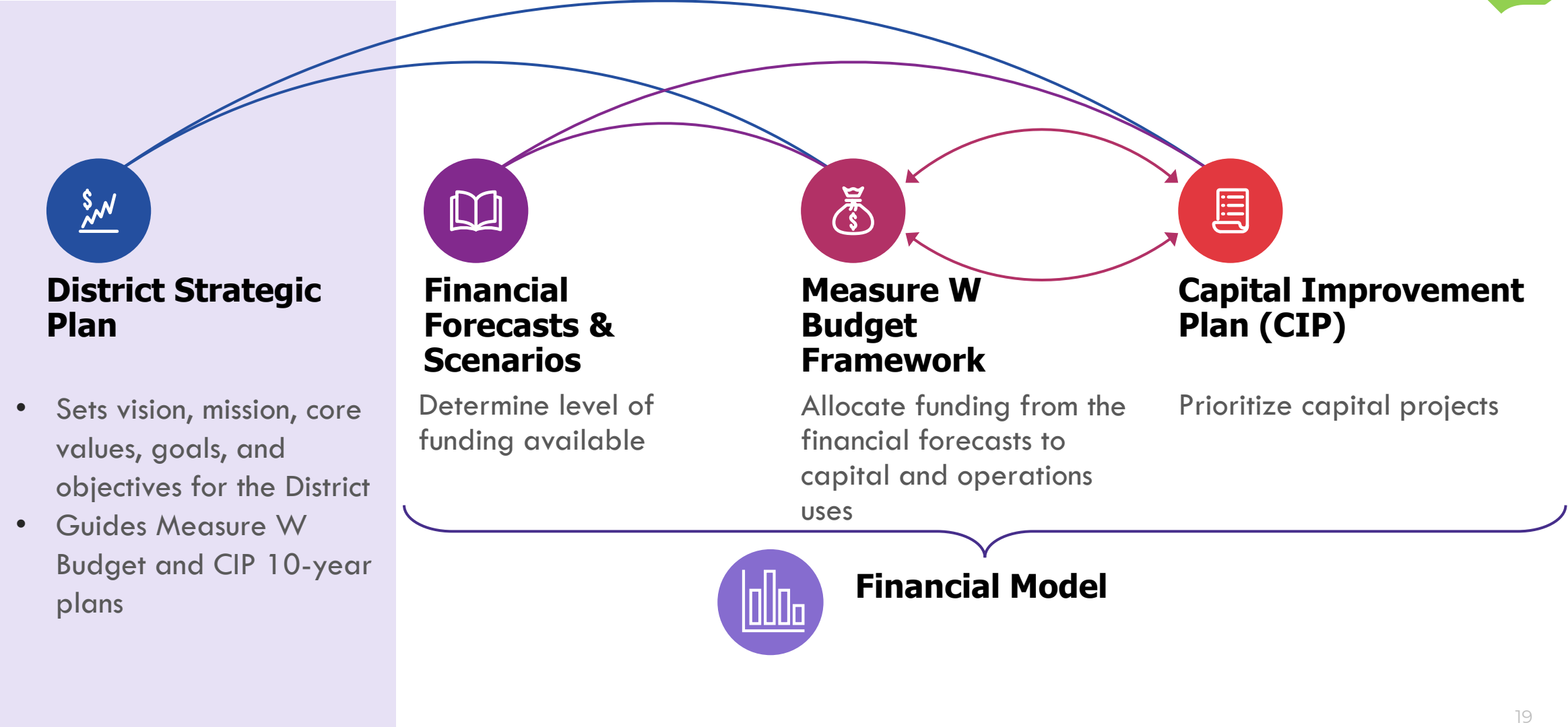


Update on CIP and Measure W 10-Year Plans

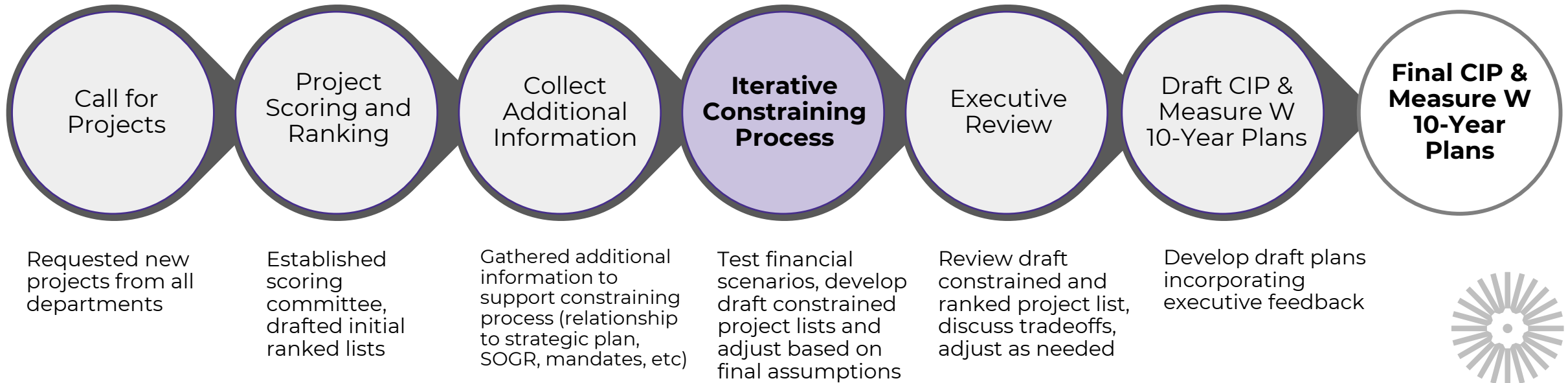
Sustainability and Resilience woven into all components



Relation to Other Work



CIP and Measure W 10-Year Plans Development Process





Next Steps

Next Steps



Nov 2024

Board adoption of District Strategic Plan



Remainder of 2024

Finalize 10-Year CIP and Measure W Plans

- ✓ Financial modeling and scenario testing
- ✓ Iterative constraining process
 - ✓ Executive review
- ✓ Develop draft plans and integrate into FY26-27 budget cycle



Early 2025

Board adoption of 10-Year CIP and Measure W Plans



Nov 2024 – July 2025

Launch Strategic Plan implementation process

- ✓ Work with lead departments to develop metrics, timelines, etc.
- ✓ Socialize Strategic Plan Districtwide
- ✓ Align District policies, programs, processes with Strategic Plan (ongoing)

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**Thank you!
Questions?**

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