

*San Mateo County*  
**TRANSIT DISTRICT**

*MOVING SAN MATEO COUNTY:*

# **San Mateo County Transit District's 10-Year Strategic Plan**

2026 - 2035



**November 6, 2024**

**A LETTER FROM THE BOARD CHAIR MARINA FRASER**



On behalf of the entire Board, it is my privilege to present to you the San Mateo County Transit District's 10-year strategic plan, *Moving San Mateo County*.

The last few years have been unlike anything our agency, and the entire transit industry, has ever seen. The challenges we have experienced have been unprecedented. But through our employees' resilience, ingenuity, and creativity we have begun to work together to address the changing transportation patterns and needs of our riders and employees in a post-COVID-19 world.

Today, more people are traveling at off-peak times and looking for more flexible ways to get around for all types of trips, and we've adeptly responded with the implementation of the full *Reimagine SamTrans* bus network, a same-day paratransit pilot program, and our new Ride Plus microtransit service.

There is still much more to be done. *Moving San Mateo County* recognizes the collective efforts that will be needed to foster collaboration within and beyond the District, underscoring just how critical our staff is to achieving the goals, objectives, and initiatives described herein. I am confident that through the realization of this plan, the District will be even better positioned to revolutionize mobility and create a more equitable and sustainable region.

A handwritten signature in black ink that reads "M. M. Fraser".

Marina Fraser  
Board Chair  
San Mateo County Transit District

**A LETTER FROM THE GENERAL MANAGER AND CEO APRIL CHAN**



San Mateo County and the larger region depend on the San Mateo County Transit District ("District") to get people where they need to go—safely, conveniently, and reliably. Caltrain and the Transportation Authority also depend on the District to perform integral administrative functions that, in turn, help them keep trains running and deliver critical transportation funding and projects to our region. Our dedicated employees work tirelessly to make this happen, and I am proud of what we have accomplished since our founding in 1976.

The last District strategic plan addressed the five years from 2015 to 2019. Much has changed since then, both locally and globally. With the passage of the Measure W sales tax in 2018, the District secured an additional long-term funding source to support operations, maintenance, and capital projects. The COVID-19 pandemic caused profound societal and service disruptions and changed travel patterns dramatically. The need for a fresh perspective and a new strategic plan is clear.

That is why I am delighted to present *Moving San Mateo County*, which will chart our path as we look forward to the next 10 years at the District. In *Moving San Mateo County*, we answer big questions about how best to evolve to meet and exceed the needs of our riders while also ensuring the District is a wonderful place to work. I have never been more excited about our future and the futures of the agencies we support.

I have had the privilege of serving the District for over 20 years—in roles across capital programs, budgets and grants, planning and development—and now as General Manager and CEO. My lived experience has shown me that this organization is capable of incredible growth and innovation. During the development of this strategic plan, we engaged in discussions with District staff and asked them what they found most positive about working here. Time and time again, they answered "our people." I am confident that it is our dedicated people who will lead us to success.

*Moving San Mateo County* establishes our aspirations for the future of the District. Building this future will be exciting and transformative, though it likely will involve difficult conversations about necessary tradeoffs. The plan serves as a guide, helping the District navigate a path by linking our vision to specific, actionable steps that will drive change.

By working collaboratively, leaders at every level of our organization will tackle challenges head-on to provide an exceptional mobility experience for the people and communities in San Mateo County.

Sincerely,

A handwritten signature in black ink that reads "April Chan".

April Chan  
General Manager and CEO



# Table of Contents

Acknowledgments.....	vii
Executive Summary.....	1
Introduction.....	7
Key Trends.....	15
Vision.....	19
Mission.....	20
Core Values.....	21
Strategic Goals, Objectives & Initiatives.....	23
Implementation, Monitoring & Evaluation.....	53
Conclusion.....	55
Appendix A: Initiative Action Matrix.....	57
Appendix B: Interviewees.....	68







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# Executive Summary

## Purpose and Scope

*Moving San Mateo County*, the San Mateo County Transit District's (District) strategic plan, will guide all policy, investment, and service decisions over the next ten years. It provides strategic direction to address the District's multi-faceted and unique role as the provider of bus transportation for the county (SamTrans) and as managing agency and provider of shared services for Caltrain and the San Mateo County Transportation Authority (TA), and staff support for the San Mateo County Express Lanes (ELJPA). The scope of the plan covers the District as a workplace and an employer, and as a managing agency and provider of shared services. The plan also focuses on creating a vision for SamTrans service delivery and investments.

## Why now?

Any complex organization needs to regularly update its strategic plan to maximize effectiveness and clarity in its pursuits. The last District strategic plan addressed the five years from 2015 to 2019 and much has changed since then. With the passage of the Measure W sales tax in 2018, the District secured an additional long-term funding source to support operations, maintenance, and capital projects. The COVID-19 pandemic caused profound societal and service disruptions and changed travel patterns dramatically. Additionally, changes to the District's organizational structure created

a new working environment that is very different from 2019. For all these reasons and more, the District had an acute need to revisit its strategic goals and their alignment with day-to-day service delivery.

## Plan Development Process

This plan is the result of an extensive strategic planning process launched in May 2023. The District sought to understand existing trends locally and in the transit industry through a travel trend analysis, as well as through interviews with peer agencies, thought leaders, and partner agencies. An extensive in-reach process with District staff followed, including two rounds of department interviews, an employee survey, frontline worker listening sessions, and two rounds of executive and board workshops. This process resulted in development of the following vision, mission, core values, and goals, which together serve as the foundation of the strategic plan.

## Vision

The future we envision:

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

## Mission

How we will achieve it:

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

## Core Values

The guiding principles that define our culture and behavior:



### Equity

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



### Partnership

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



### Excellence

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



### Safety

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



### Innovation

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



### Sustainability

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



## Goals and Actions

This section outlines the *Moving San Mateo County* goals and highlights a few of the major themes of the initiatives that will be undertaken to meet each goal.

### **Goal 1: Deliver Better Mobility Services**

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

SamTrans is dedicated to improving mobility in San Mateo County through a multifaceted approach that centers equity, sustainability, and customer experience. This includes targeted investments in core service corridors to enhance service and transit priority infrastructure. SamTrans will continue to invest in zero-emission bus fleet and infrastructure, as well as the resilience and state of good repair of existing infrastructure. We will undertake a systemwide service analysis, pilot improvements to paratransit services and test a mobility wallet concept.

### **Goal 2: Provide Outstanding Customer Experience**

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

SamTrans will improve the transit and paratransit rider experience through better real-time communication and arrival information. We will pilot the use of paid ambassadors to improve customer experience, build trust, and boost rider loyalty by creating a rider rewards program. We will institute a robust safety culture that is consistent Districtwide and enhances customer experience. We will respond to changing climate impacts to riders by providing mutual aid and explore options for free fares on extreme weather days.

### **Goal 3: Become an Employer of Choice**

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

The District will prioritize recruitment and retention, and offer a total compensation package with competitive salaries and benefits. We will build and maintain a culture of trust and recognize employee achievements. The District will standardize employee performance metrics and career pathways, conduct regular employee surveys, and provide enhanced management training. We will integrate diversity, equity, inclusion, and belonging (DEIB) efforts by adopting DEIB workforce goals and providing tools for a more inclusionary workplace. We will provide a safe and modern workplace for all District employees, including access to restrooms for bus operators, replacing Building 200 at North Base, and relocating District Headquarters.

### **Goal 4: Lead Responsibly**

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

The District will improve internal processes beginning with a focus on procurement and employee recruitment process. We will implement recommendations from the IT Strategic Plan and ensure that the budget process reflects funding and staffing needs required to achieve the initiatives outlined in this strategic plan. We will design and implement an Environmental Management System (EMS) to meet environmental and financial goals and improve operational effectiveness, and we will measure and communicate the environmental impacts of agency activities.





**Goal 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.

Shared Services like the Board Secretary, Finance, Innovation & Technology, Marketing & Communications, People & Culture, and Sustainability are used by all agencies under the District. The District also has partially shared service areas with SamTrans and Caltrain counterparts that work together. As such, it is important we develop a mutually agreed-upon Shared Services Agreement to improve service delivery and clarify expectations, roles, and responsibilities. We will also develop metrics and a work plan for tracking Shared Services performance so that we can evaluate and make any adjustments in the future.

**Goal 6: Exercise Collective Efforts**

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

The District will participate in regional transit coordination initiatives and regional climate adaptation efforts, and dedicate resources to protecting critical lifeline assets. We will build stronger partnerships to improve transit service for our riders, working conditions for operators, and transportation options for youth. We will create a transit-oriented development (TOD) policy that encourages development near transit hubs in key areas. We will also collaborate with agency partners and local stakeholders to improve safe routes to transit for bicyclists and pedestrians.

**Implementation, Monitoring, and Evaluation**

The District will establish a system for implementing the initiatives described in this plan, monitoring and evaluating progress towards achieving the six strategic goals, and reporting to the organization and its stakeholders. The District will make periodic updates to the plan, as well as a more substantial refresh after five years. Together, these efforts will ensure that the plan will be translated into action and be consistently relevant for the next decade.

The plan is meant to be dynamic and continuously evolve, and the initiatives were designed to be ambitious, yet achievable. Some initiatives in this plan have already begun, and some new initiatives will become part of the District's ongoing course of business. The strategic plan will be reviewed every year to assess progress, reflect on outcomes, adjust where necessary, and outline next steps.





# Introduction

Public transit is an essential service. It is a lifeline for those who cannot or do not drive, a sustainable and community-oriented form of transportation, and often a great way to avoid the frustrations of traffic congestion and parking. The San Mateo County Transit District (District) – through the public transit services provided by SamTrans and Caltrain, and the transportation programs funded and delivered by the Transportation Authority (TA) – is well positioned to positively impact quality of life and economic vitality in the county. However, like many other agencies, the District can find itself pulled in multiple directions at once, which makes it harder to effectively deliver on agency goals.

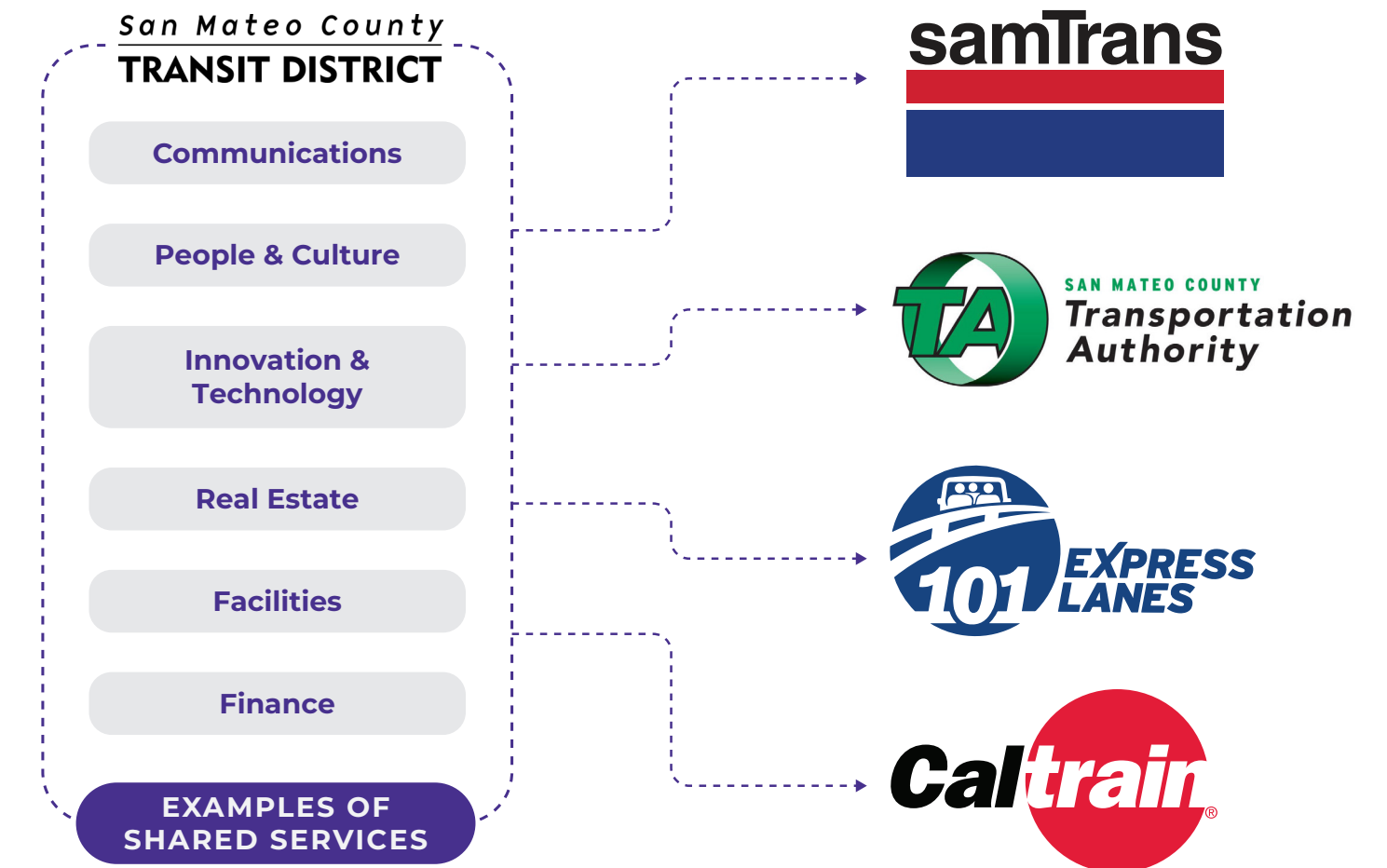
This plan is intended to bring clarity to those goals, building on the strong foundation the District already has, and lay out what it will accomplish over the next decade. It begins with a very broad vision for what needs to be done, and then becomes more specific with a set of initiatives needed to realize that vision. Upon full implementation, *Moving San Mateo County* will propel the District and the region forward with a transit system known for its reliability and excellence.



## About the San Mateo County Transit District

The District is the local government organization responsible for administering the principal public transit and transportation programs in San Mateo County: SamTrans fixed route service and associated paratransit and microtransit services, Caltrain commuter rail service owned by the JPB, and the TA. The District also performs certain administrative functions for the San Mateo

County Express Lanes Joint Powers Authority (ELJPA). The JPB, the TA, and ELJPA rely on the District to provide administrative and staff services (i.e., shared services) under the direction and oversight of their respective boards, each maintaining a separate corporate identity and governance. Following is a brief description of each agency.





**SamTrans**

SamTrans is a branded bus service, with associated Redi-Wheels and RediCoast paratransit and Ride Plus microtransit services that, together, operate primarily in San Mateo County, which encompasses 20 incorporated cities and unincorporated areas. SamTrans maintains over 300 fixed-route revenue vehicles and operates over 70 routes spanning from San Francisco to Santa Clara. Many bus routes make connections to Caltrain, Bay Area Rapid Transit (BART), and the San Francisco International Airport.

**Caltrain**

Owned and operated by the JPB, Caltrain is the commuter rail service between San Francisco and Gilroy, which runs along the Peninsula and through the South Bay and San Jose. In 2022, the JPB established a separate, permanent Caltrain executive director that reports exclusively to the Joint Powers Board, to supplement the “Shared Services” model through which some District departments support the JPB as well as the District. The JPB consists of three members appointed by each member agency, including the District, the City and County of San Francisco and the Santa Clara Valley Transportation Authority (VTA).

**Transportation Authority (TA)**

The TA plans, funds, and delivers transportation programs and projects throughout San Mateo County. It was formed in 1988 with the passage of the voter-approved half-cent sales tax for countywide transportation projects and programs, known as Measure A, which was re-authorized in 2004. In 2018, county voters passed the District’s Measure W Sales Tax, which provided an additional revenue stream to improve transit and relieve traffic congestion. The District tasked the TA with administering 50% of the Measure W revenues as directed by the Measure W Congestion Relief Plan. The TA is governed by its own appointed board of directors. The District’s General Manager/CEO serves as the TA’s Executive Director.

**San Mateo County Express Lanes Joint Powers Authority (ELJPA)**

The ELJPA owns and operates 22 miles of express lanes in both directions on US 101 between the San Mateo-Santa Clara County Line and I-380 in South San Francisco. The ELJPA is governed by a six-member board consisting of three TA board members and three members of the City/County Association of Governments of San Mateo (C/CAG). The goals of the express lanes are to reduce congestion, reduce travel times, and make travel times more reliable. Staff functions are provided by both the TA and C/CAG.

**Strategic Plan Purpose and Scope**

The strategic plan is a foundational document that guides all policy, investment, and service decisions over the next ten years. It provides strategic direction both organizationally and programmatically to address the District's multi-faceted and unique role as the provider of bus transportation for the county (SamTrans) and as managing agency and provider of shared services for Caltrain and the TA, and staff support for the ELJPA.

The scope of the plan covers the District as a workplace and an employer, and as a managing agency and provider of shared services. The plan also focuses on creating

a vision for SamTrans service delivery and investments; it does not address Caltrain's service vision, delivery, and investments, nor the strategic vision for the TA or ELJPA.<sup>1</sup>

With a ten-year horizon through fiscal year 2035, *Moving San Mateo County* will help align and focus the District’s functions, prioritize resources, and outline a process to report and measure progress over the next decade. This plan serves as the bedrock that informs all of the District’s other plans, including the Measure W 10-Year Budget Framework and SamTrans Capital Improvement Plan (CIP), and other programs and services to achieve a collective vision.

<sup>1</sup> To read Caltrain’s strategic plan, please see <https://www.caltrain.com/media/2198/download?inline>; to read the Transportation Authority’s strategic plan, please see: <https://www.smcta.com/about-us/funding-overview/strategic-plan-2020-2024>





### Why Now?

The last District strategic plan addressed the five years from 2015 to 2019. Much has changed since then, both locally and globally. With the passage of Measure W sales tax in 2018, the District secured an additional long-term funding source to support operations, maintenance, and capital projects. The District made significant progress on its 2018 Strategic Business Plan by delivering key projects such as installing wi-fi on buses, piloting and refining the Way2Go pass program, completing a countywide shuttle study, conducting a microtransit pilot program in Pacifica, and completing the *Bus Stop Improvement Plan*. Way2Go has since been instituted as a permanent pass program that allows educational institutions, residential complexes, and employers to purchase unlimited-ride annual passes for all eligible students, residents, or employees.

Additionally, as of summer 2024, SamTrans has fully implemented *Reimagine SamTrans*, a comprehensive refresh of the fixed-route bus network, and it is already seeing increased ridership on core routes. Building on lessons learned from the microtransit pilot program, SamTrans has also launched Ride Plus on-demand service in East Palo Alto and Half Moon Bay as part of the rollout of the new *Reimagine SamTrans* network. Also as of 2024, the District is receiving steady deliveries of new zero-emission vehicles to aid in the full transition of its SamTrans fleet away from diesel buses.

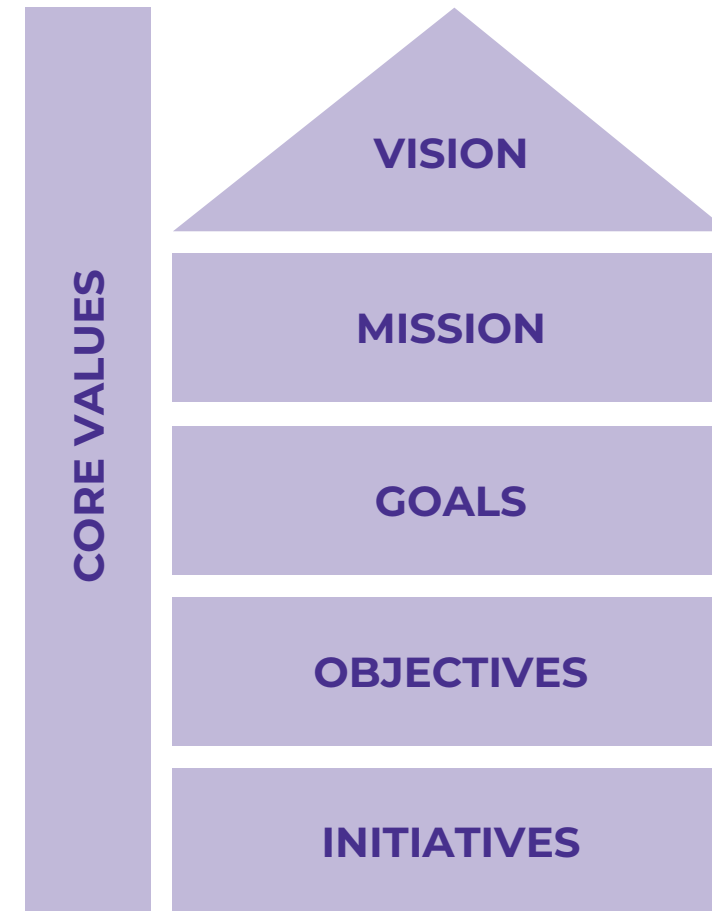
On the organizational side, the governance and relationship of Caltrain to SamTrans has been codified by the 2022 Memorandum of Understanding (MOU) between JPB, VTA, the District, and the City and County of San Francisco, including a continuing mandate for Shared Services provided by the District. The District has also made great strides to integrate sustainability and equity into its policies and business practices.

Much of this has happened against the backdrop of the COVID-19 pandemic when, in 2020, SamTrans ridership plummeted over 70 percent, service was slashed by nearly half, and the District lost over a million dollars in fare revenue each month. In the face of a historic public health disaster, District staff worked tirelessly to plan and deliver responsive, safe, and high-quality public transportation, demonstrating resilience, hard work, and ingenuity. The District and JPB were active partners in the MTC's Blue Ribbon Transit Recovery Task Force, convened during the height of the pandemic in 2020, to guide the future of the Bay Area's public transportation network as the region adjusted to conditions created by the pandemic.

The once-familiar landscape of transportation has undergone a seismic upheaval, prompting a necessary re-evaluation of strategies and priorities. Enter the new strategic plan, *Moving San Mateo County*, crafted to guide the District through the next decade.

### Organization of Strategic Plan

The plan is underpinned by a vision, mission, and six core values.



#### Vision

The vision is the District's long-term aspiration and describes the future it strives to realize for the agency.

#### Mission

The mission encapsulates the fundamental purpose of the District, what it does, and whom it serves.

#### Six Strategic Goals

Six strategic goals have been identified to offer more specificity in how the District will achieve the vision. Each goal is supported by key objectives and a series of initiatives.

#### Objectives & Initiatives

The Initiative Action Matrix at the end of this document (Appendix A) summarizes the goals, objectives, and initiatives contained in this plan for quick reference. The District will rely on this Initiative Action Matrix to plan and deliver specific projects, as well as issue periodic reports to the public on the progress towards these goals and initiatives. Lastly, staff will comprehensively update the plan after five years to ensure the District is advancing towards its vision.

#### Six Core Values

The core values are the beliefs and principles that guide the behavior and decisions of everyone within the District when taking actions to realize the vision and mission.



## Strategic Plan Development Process

An extensive strategic planning process began in May 2023. As a first step to understand existing trends locally and in the transit industry, the District conducted a travel trend analysis, as well as interviews with peer agencies, thought leaders, and partner agencies. A full list of those interviewed can be found in Appendix B. The planning process included an extensive in-reach process with District staff, including two rounds of department interviews, an employee survey, pop-up tabling events at North and South Bases and central HQ, frontline worker listening sessions, and two rounds of executive and board workshops. All of these touch points included individuals

from Caltrain, the TA, and SamTrans. The team also utilized findings from a recent Diversity, Equity, Inclusion, and Belonging (DEIB) study of over 100 employees across ten different focus groups.

Key themes identified through the employee in-reach process included the desire for: streamlined internal processes and data standards; competitive salaries and attractive benefit packages; additional resources for employee recruitment and retention; increased recognition of achievements; increased collaboration across departments and work locations; and, enhanced transparency and communication across all levels of staff. Input received from District employees directly informed the goals, objectives, and initiatives outlined in this plan.



Relevant information from major plans, including rider feedback from the recent *Bus Stop Improvement Plan* and *Reimagine SamTrans*, was considered, as well as ridership survey results from SamTrans' triennial onboard survey and MTC's 2022 *Origin-Destination Study*.

Additionally, input from the SamTrans Citizens Advisory Committee, the Accessibility Advisory Committee, and the San Mateo County Paratransit Coordinating Council helped shape the plan. The District also engaged with staff from local jurisdictions and representatives from business, non-profits, advocacy groups, and other stakeholders. The general public weighed in on elements of the draft strategic plan at a multilingual virtual community meeting. This engagement was enormously valuable in identifying key trends and developing the core elements and priorities identified in the plan.

## Strategic Plan Engagement Process





# Key Trends

Understanding the overarching trends and forecasts that will shape transportation needs over the next decade in San Mateo County is critical to the District’s success in meeting those needs. The plan’s six strategic goals have been informed by the following key trends.

## Transit must respond to changing travel patterns

SamTrans ridership is steadily recovering at a rate that is outpacing many peers both regionally and nationally.<sup>1</sup> Total ridership for calendar year 2023 reached 83 percent of pre-pandemic levels (2019), with core routes achieving even higher ridership recovery. In May 2024, total ridership reached 98 percent of pre-pandemic ridership, and SamTrans adult fare usage recovery is 114 percent (as compared to May 2019).<sup>2</sup>

**98%** ridership recovery to pre-pandemic levels as of May 2024

**82%** of riders rely on SamTrans as their primary mode and use it 4+ times a week

**37%** of riders reported Spanish as the most common language spoken at home

Travel patterns have changed post-pandemic. A greater share of post-pandemic travel occurs at off-peak periods, as measured along the San Mateo and Dumbarton bridges.<sup>3</sup> Many office workers are settling into a hybrid work schedule and traditional commuting patterns have changed.<sup>4</sup> However, most SamTrans riders (82 percent) rely on the system as their primary mode of transportation and use it at least four days per week.<sup>5</sup>

Further, the share of SamTrans riders of color has increased since 2015, driven by an increase in the share of Latino riders. For 37 percent of riders, Spanish is the most common language spoken at home, followed by Tagalog (16 percent) and Cantonese (4 percent).<sup>6</sup> Ridership demographics are also shifting in terms of age. The share of youth and senior riders has increased since 2015. In 2021, 25 percent of riders were between 13 to 18 years of age and 13 percent over 65 years of age, compared to just 18 and 11 percent, respectively, in 2015.<sup>7</sup>

3 MTC 2023  
4 Bay Area Council Employer Survey  
5 2021 SamTrans Triennial Customer Survey  
6 SamTrans 2021, 2018, 2015 Triennial Surveys  
7 SamTrans 2021, 2018, 2015 Triennial Surveys

1 FY23 Annual Survey, September 6, 2023 SamTrans Board of Directors Meeting.  
2 SamTrans Monthly Performance Report, May 2024.

## Local affordability issues impact transit use

San Mateo County has a very high cost of living; a four-person household earning under \$149,100 annually is considered low-income.<sup>8</sup> Increases in rent payments since 1970 have outpaced growth in household incomes.<sup>9</sup> The share of SamTrans riders that have access to a vehicle has decreased since 2019, and SamTrans riders making less than \$50,000 continue to represent the highest share of overall ridership.<sup>10</sup> In fact, nearly 39% of riders earn less than \$25,000 annually.

## San Mateo County is growing

San Mateo County is expected to add 129,000 households and 114,000 jobs between 2015 and 2050—a nine percent projected regional housing growth and eight percent projected regional job growth.<sup>11</sup> Future development in San Mateo County is expected especially along El Camino Real and within Bayside communities.<sup>12</sup>

**39%** of riders earn less than \$25,000 annually

**9%** projected regional housing growth between 2015 - 2050

8 California Department of Housing and Community Development 2023 State Income Limits  
9 MTC Vital Signs  
10 SamTrans 2021, 2018, 2015 Triennial Surveys  
11 Plan Bay Area 2050  
12 Plan Bay Area 2050

## Climate change mitigation programs are needed, but costly

Approximately 40 percent of California’s greenhouse gas (GHG) emissions stem from surface transportation (all modes). Whether Californians choose to drive or take public transit is one of the most significant climate choices they make every day. The California Innovative Clean Transit (ICT) Regulation requires public transit agencies like SamTrans to transition to a 100 percent zero-emission bus fleet by 2040, which SamTrans aims to accomplish by 2034. Sea level rise adaptation is expected to cost San Mateo County more than \$10 billion through 2050.<sup>13</sup> Climate hazards such as sea level rise, storm surge, and fluvial flooding present major issues for the District’s infrastructure and facilities.<sup>14</sup> Increasing temperatures put SamTrans’ customers at risk of heat-related health impacts.<sup>15</sup>

**40%** of GHG emissions stem from surface transportation

**\$10 Billion** cost of sea level rise adaption in San Mateo County through 2050

13 MTC / Association of Bay Area Governments and the San Francisco Bay Conservation and Development Commission, Sea Level Rise Adaptation Funding and Investment Framework Final Report, July 2023.  
14 SamTrans Adaptation and Resilience Plan, 2021  
15 SamTrans Adaptation and Resilience Plan, 2021



 **Labor shortages constrain the District**

Labor shortages constrain the District's ability to adequately staff and increase SamTrans service. An aging workforce, high retirement rates, competition for workers across the Bay area, complex regulatory and licensing requirements, and concerns about work schedules, compensation, and benefits are all challenges.<sup>16</sup> The very high cost of living in San Mateo County exacerbates these challenges.

 **Operating expenses are likely to outpace revenue growth**

Within the next decade, the District's operating expenses are expected to outpace revenue growth. Current funding sources (Measure W, local sales tax, formula funds, and others) will need to be supplemented by external funding such as competitive federal and state grants, in order to implement the District's capital program, in particular, the transition to zero-emission vehicles.

 **Regional coordination and governance is complex**

The Bay Area has 27 independent transit agencies with full local authority, and coordinating high-quality regional transit is challenging. Additionally, the governance structure dictated by the 2022 Memorandum of Understanding (MOU) provides a unique staff reporting structure and Shared Services model, and is organizationally complex.



<sup>16</sup> APTA Transit Workforce Shortage Synthesis Report, March 2023



# Vision

The future we see by executing this plan:

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

The District envisions a future where it provides exceptional mobility options for San Mateo County that meet standards of the highest quality. These services are plentiful, enjoyable to use, efficient, safe, and reliable. These services will enhance connectivity and accessibility throughout the county and provide a world-class customer experience that will substantially benefit our local communities. Through continuous innovation and an unwavering commitment to safety, the District earns a reputation of excellence.



# Mission

How the District employees will accomplish the vision:

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

This mission is built around the idea of collaboration, which is both a worthy goal and a critical ingredient in the achievement of the vision. Only by working hand-in-hand with its stakeholders, partners, and dedicated employees can the District cohesively integrate high-quality mobility options to provide equitable access to opportunity. By embracing new technologies and forward-thinking policies, the District will work to reduce reliance on single-occupancy vehicles, improve air quality, and enhance the quality of life for a more sustainable and vibrant San Mateo County.




# Core Values

While its vision and mission provide direction and focus for the District, the core values influence its organizational identity and culture. Core values apply to everything the District does, for customers and employees, and are intended to guide its overall behavior and actions. These six core values— equity, excellence, innovation, partnership, safety, and sustainability— serve as a foundation for effective and consistent District interactions, activities, and decision-making at every level, and play a crucial role in shaping the District’s inclusive, resilient, and team-oriented internal culture. By clearly defining these values, the District is committing to its stakeholders that it will uphold them in the execution of this plan.

 **Equity**

 **Excellence**

 **Innovation**

 **Partnership**

 **Safety**

 **Sustainability**

 **Equity**

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

Communities thrive when they have affordable, accessible, and timely transportation to the places where they live, work, and play. The District prioritizes equitable access in all of its services and operations, ensuring that customers and employees alike can thrive regardless of background or circumstance. By providing high-quality mobility options that meet its customers’ diverse needs, the District will enhance connectivity for a stronger, more resilient, and economically prosperous San Mateo County.

 **Excellence**

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

The District strives to go above and beyond to ensure an exceptional mobility experience. Providing an excellent experience for our customers depends on building and maintaining a workforce that feels supported and empowered to bring their best to work every day. The District maintains this level of excellence by being an employer of choice, investing in its employees, and providing a safe and modern workplace. This internal and external excellence fosters operational efficiency and innovation, ultimately enhancing long-term financial stability and customer satisfaction.

 **Innovation**

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

The District embraces a culture of innovation by creating space for employees to explore new ideas, technologies, and approaches to meet the evolving mobility needs of San Mateo County. By fostering an environment where calculated risks are welcomed and learning from failure is embraced, the District is positioning itself to effectively address emerging challenges and proactively refine its mobility offerings.

 **Partnership**

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

The District does not operate in isolation and recognizes the critical roles that trust, empathy, and teamwork play in delivering its services. Activating and leveraging the collective strengths of its workforce, the District celebrates collaboration to work together as one team. The District proactively turns this collaborative spirit outward, fostering partnerships with other agencies, businesses, and community organizations to optimize sustainable transportation service delivery.

 **Safety**

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

The District is committed to ensuring the welfare of employees and customers in every aspect of operations. Through rigorous training programs, proactive risk assessments, and continuous improvement initiatives, the District strives to mitigate hazards and prevent accidents. The District equally emphasizes the mental, physical, and emotional health of its workforce by providing resources to promote well-being, and upholding and enforcing the highest standards for workplace conduct.

 **Sustainability**

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

The District is committed to creating more opportunities for people to use public transit and, by doing so, reduce environmental harm. The District commits to advancing regional sustainability by reducing resource use, minimizing its impact on the environment, improving operational effectiveness, and measuring the environmental impacts of its activities to identify opportunities for improvement. By encouraging the use of public transit in our local communities, the District is creating a resilient and sustainable environmental present and future for all of San Mateo County.



# Strategic Goals, Objectives & Initiatives

Moving San Mateo County includes six strategic goals that we believe will lead us towards our Vision, guide us on our Mission, and are consistent with our Core Values. These goals act as a strategic roadmap and are bolstered by clear, specific, and measurable objectives, which are operationalized via discrete initiatives. By executing on these initiatives, the District commits to creating lasting and positive change for customers, employees, and the region over the next ten years.



## **Goal 1: Deliver Better Mobility Services**

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

Investing in expanded sustainable transportation options can help make modes other than driving more efficient, accessible, and compelling. SamTrans will continue to work to adopt service patterns and offerings that are responsive to the travel patterns and needs of customers. For SamTrans, this means thinking creatively, committing to and building on innovative initiatives, and testing concepts that improve the overall customer experience. SamTrans believes that by making transit and other sustainable options laser-focused on responding to rider needs, we can improve efficiency, contribute to regional emissions reductions, and increase equitable access to services.

## **Objective 1A Improve and expand existing SamTrans services**

Improving and expanding transit services requires a strong understanding of the travel patterns—and unmet needs—of riders. Improvement to services is most effective when the services are analyzed based on their intent, whether it is to improve travel times, accessibility, or frequency of service. The SamTrans services most critical to Objective 1A are those along core corridors that serve key markets or will be experiencing projected growth over the next ten years, and on-demand services that can help to fill service gaps.





***Initiative 1A.1 Invest in new or existing service in key transit corridors***

SamTrans is dedicated to investing in key corridors where demand and ridership are high, such as El Camino Real/SR 82, and the Dumbarton Rail Corridor, to better serve existing riders and increase transit service where it is most needed. El Camino Real is one of the highest density corridors connecting the northern and southern ends of the county, accounting for one-quarter of daily SamTrans riders. SamTrans will also explore ways to enhance or optimize its service patterns by leveraging Caltrain’s electrified service (as it runs parallel to the El Camino Real corridor). Near-term transit service operating within the Dumbarton Rail Corridor, particularly the Peninsula portion from Redwood City to East Palo Alto, provides an opportunity to implement high-quality transit service in key equity priority communities, while SamTrans continues to explore future funding opportunities and alternatives for a high quality, high-capacity public rail system.

SamTrans will increase and enhance transit service through quick-build transit priority treatments (e.g., bus lanes and high occupancy vehicle (HOV) lanes, transit signal priority, transit and pedestrian bulb-outs, turn restrictions, and other tools) and longer-term, major capital improvement projects on key transit corridors. SamTrans will also lean into its multifaceted role as leader, collaborator, and convenor to bring together the expertise of the cities, county, and regional agencies it interfaces with to build

a strong San Mateo County transportation network through the Grand Boulevard Initiative and other efforts. Finally, SamTrans will pursue local, state, and federal funding options to deliver these improvements. SamTrans will also seek to influence state and local policy to increase opportunities for funding and set proactive policies to allow a rapid rollout of transit priority treatments.

***Initiative 1A.2 Adapt service to new travel patterns and increase service for key markets***

Transit agencies across the country and the world have experienced changes in ridership patterns since the COVID-19 pandemic. While SamTrans recently completed implementation of the full *Reimagine SamTrans* bus network, which is responsive to post-pandemic travel patterns, it must continually review changing travel demand to meet the needs of its riders.

SamTrans will embrace creativity and innovation in service planning to adapt to evolving travel patterns in the county. This may include expanding service frequency and/or coverage during off-peak times on the weekends and during the early morning and late evening hours, particularly in equity priority areas.<sup>17</sup> Ahead of the next comprehensive operational analysis (see Initiative 1B.2), SamTrans will also explore opportunities to enhance transit service for key ridership markets such as non-traditional time commuters, students/youth, seniors, veterans, and those in transitional housing.

<sup>17</sup> SamTrans has established Equity Priority Areas (EPAs) to inform where its limited resources should be invested in the county. EPAs were identified using a composite index that accounts for household income, non-white households, and zero-vehicle households. These three metrics are combined into a final rank representing need for transit service.

***Initiative 1A.3 Evaluate and refine on-demand services***

SamTrans launched its Ride Plus on-demand transit service in June 2023 serving riders in Half Moon Bay, El Granada, East Palo Alto, and Belle Haven. The service has been popular with riders, and ridership has seen steady growth. After establishing evaluation metrics and criteria for expansion, SamTrans may build on Ride Plus’ success by developing and expanding on-demand transit services where they offer positive net benefits, such as in areas that are difficult to serve by traditional fixed-route transit. Any new services will incorporate lessons learned from these first Ride Plus service areas, and SamTrans will further consider opportunities for operational and customer efficiency by exploring commingled rides that share paratransit and demand-response vehicles.

***Initiative 1A.4 Invest in resilience, improvement, and state of good repair for existing infrastructure***

Providing excellent service to riders requires SamTrans to maintain and improve its existing infrastructure over time. Investing in an effective State of Good Repair program is essential for delivering safe and reliable transit free from service disruptions and is even more critical now given the impacts from climate change. This applies to the visible infrastructure that passengers see, such as buses, fare validators, and bus stops, but also everything behind the scenes like administrative facilities, vehicle maintenance yards, fueling stations, and enterprise software systems. Leveraging tools such as life cycle costing in capital planning, Transit Asset Maintenance compliance, and Enterprise Asset Management software utilization, will help SamTrans anticipate, prepare for, respond to, and recover from adverse impacts related to or exacerbated by climate change.





**Objective 1B Experiment and respond to the changing transportation landscape**

Providing better transportation options requires incorporating the most useful transportation technologies and innovations. SamTrans will embrace the District’s core value of innovation by being willing to consider new ideas; pilot new processes and projects; and leverage investments by other transit operators, local municipalities, and Caltrans to better serve riders. By piloting, iterating, and evaluating, SamTrans will build upon past successes—and more importantly, lessons learned—to tailor service to evolving customer needs.

*Initiative 1B.1 Conduct a fare policy study and continually refine fare programs to meet customer needs*

While SamTrans regularly updates aspects of its fare structure, it has not conducted a comprehensive study since 2018. SamTrans will conduct an updated fare policy study centered around the vision, core values, and goals outlined in this strategic plan. The study will consider the need to balance revenue considerations along with policy priorities such as sustainability, equity, and customer experience. SamTrans’ study will consider promotional programs, fare policies for key markets, opportunities to integrate and participate in regional transfer or coordinated fare programs, and better fare integration with operators that SamTrans’ customers frequently transfer to (Alameda Contra Costa Transit District (AC Transit), BART, Caltrain, San Francisco Municipal Transportation Agency (SFMTA), and VTA).

*Initiative 1B.2 Undertake a systemwide service analysis/comprehensive operational analysis (COA)*

SamTrans fully implemented its current COA, *Reimagine SamTrans*, in the summer of 2024. Looking ahead to the next decade, systemwide service planning updates will be necessary to analyze and evaluate where improvements can be made to make service design and delivery more efficient, effective, and customer focused. SamTrans will begin this updated process by undertaking a market study (see Initiative 1A.2) to identify opportunities to better serve key ridership markets and prepare for a future COA. Outcomes of this analysis will include a stronger organizational understanding of travel and ridership patterns that can be used to better align future system development and new mobility options with customer needs.

*Initiative 1B.3 Continue to pilot improvements to SamTrans paratransit services*

SamTrans is committed to delivering excellent paratransit services and will continue to explore enhancements that provide more efficiency, greater adaptability, and improved experiences for paratransit passengers. Following the successful launch of the same-day paratransit pilot, SamTrans will continue to find methods to improve services that are customer friendly—straightforward, easy-to-use, and efficient—and will look for additional ways to simplify travel for paratransit passengers. SamTrans will further consider opportunities for operational and customer efficiency by exploring commingled rides that share paratransit and demand-response vehicles.

*Initiative 1B.4 Pilot a mobility wallet concept that provides Universal Basic Mobility<sup>18</sup>*

The District is committed to delivering more equitable access to opportunities for our communities to live and thrive, in alignment with our core value of equity. One way to improve equity is by reducing the cost of transportation for low-income individuals. SamTrans will explore the potential for piloting a mobility wallet pilot program that provides universal basic mobility via a monthly subsidy to low-income individuals. The mobility subsidy could be used on transportation modes beyond transit, such as micro-mobility, rideshare, vanpool, taxi, bike share, etc. This is the basis for the region’s existing means-based pilot program known as Clipper START, which allows eligible adult riders who are lower-income to receive fare discounts of 50 percent off the adult single ride. SamTrans will build on the lessons from this regional pilot program. This pilot program will require close coordination and partnership with MTC, C/CAG, and other San Mateo County stakeholders, as well as external funding.

<sup>18</sup> Universal Basic Mobility (UBM) is the concept of providing a foundational level of mobility to all members of society, regardless of factors such as geographic location or income level, through partnerships and policies.





★ **Goal 2: Provide Outstanding Customer Experience**

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

SamTrans, as a transit provider, competes with other modes of transportation. To effectively compete, SamTrans must provide a superior transit experience. By reliably providing excellent service, SamTrans will build rider trust and loyalty. SamTrans will work to increase reliability, enhance customer communication, boost safety and security, and reward regular riders with perks, all in service of improving customer experience.

**Objective 2A Improve the transit and paratransit rider experience**

Improving the transit and paratransit rider experience includes addressing modern real-time communication expectations, maintaining high quality and easy-to-access online information, and providing clear and attractive wayfinding and customer service experiences.

**Initiative 2A.1 Improve real-time communication to and from riders**

Riders have come to expect real-time information availability and communication capabilities. To provide an outstanding customer experience that meets modern customer expectations, SamTrans will invest in customer relationship management strategies and technologies that enable communications to and from SamTrans riders. For outgoing time sensitive communications, SamTrans will explore

implementation of best practices and software for push notifications for updates associated with inclement weather, service changes, or similar infrequent updates. SamTrans will explore the potential for investing in platforms for real-time live chat features to enable easy customer exchanges to ask for help or report issues, as well as best practices and software that is accessible for riders who have hearing or visual impairments.

**Initiative 2A.2 Provide high-quality real-time vehicle arrival information**

Research shows that customers perceive their wait time at a bus stop to be shorter when they know when the bus is coming. By providing accurate, high-quality, and easily accessible real-time bus and vehicle arrival information to customers, SamTrans can improve customer experience and satisfaction. The first step in providing this information is collecting it, by continuing to ensure all vehicles in the SamTrans fleet can report general transit feed specification (GTFS) real-time location information that can be used by Google Maps, Transit App, and other online platforms. Through the *Bus Stop Improvement Plan*, SamTrans will deliver improved real-time arrival information for customers via digital signage and QR codes at bus stops. Other options to explore include real-time information onboard vehicles and free access to online real-time arrival platforms. SamTrans will also explore implementation of best practices for providing high-quality real-time bus and vehicle arrival information to customers who have hearing or visual impairments.

**Initiative 2A.3 Enhance digital and physical customer communication**

SamTrans will enhance communication with customers through an upgraded website and improved field signage. The initiative aims to improve the readability and accessibility of the website, system map, and timetables, focusing on user-friendly design for trip planning and bus stop location. Feedback from riders with visual or hearing impairments will be actively solicited and incorporated to ensure inclusivity. Recognizing that customers do not differentiate between transit service providers and prefer a cohesive experience, SamTrans will partner with cities and regional initiatives like MTC's Regional Mapping and Wayfinding project to upgrade street-level wayfinding, bus stop flags, and signage to support a comprehensive wayfinding and visual communication strategy that is regionally cohesive and consistent. The goal is to create an intuitive, cohesive rider experience that meets passenger needs and encourages continued use of SamTrans services.

**Initiative 2A.4 Implement transit-supportive infrastructure projects**

Implementing transit priority treatments in targeted locations throughout the SamTrans service area, such as dedicated bus lanes, in-lane stops, queue jumps, and transit signal priority infrastructure, is an industry best practice for increasing the speed and reliability of transit options, and essential for better customer experience. Improving bus stops with better amenities to shield those waiting from the elements and provide a well-lit place to sit is also critical to improving the customer experience.

To help achieve this initiative, SamTrans will initiate a countywide transit priority study and build a prioritized transit priority program. Additionally, SamTrans will deliver an ambitious and comprehensive bus stop improvement program in a manner consistent with the newly adopted *Bus Stop Design Guidelines*. However, to be successful, these programs will require significant collaboration across multiple jurisdictions that own and maintain the sidewalks, roadways, and signal infrastructure. SamTrans will collaborate with cities, the County, C/CAG, and Caltrans, and will coordinate with developers who have a vested interest in improving access to transit near their projects. SamTrans will actively pursue funding and implementation partnerships and opportunities to advance these initiatives.

**Initiative 2A.5 Pilot the use of paid ambassadors**

SamTrans will pilot an ambassador program to explore the customer and employee benefits that can be provided by staffing paid personnel at transit stops and on vehicles. Providing ambassadors is a useful method for improving the customer experience and can also address personal safety and security concerns without relying on increased armed law enforcement. Ambassadors carry a wealth of information to support passengers with wayfinding, payment, or other questions that may arise, and also serve as additional eyes and ears related to safety and security concerns; this helps take the burden off SamTrans operators so they can focus on their primary responsibilities.



**Objective 2B Build trust and boost rider loyalty**

Rider trust is built on a foundation of safety, which is a core value and a key component of service provision for SamTrans. SamTrans is also dedicated to rider satisfaction and will grow and retain rider trust by listening to passenger needs and addressing them promptly. SamTrans also intends to create rider rewards programs that provide perks to frequent riders and incentivize new riders to consider transit. Finally, maintaining rider trust in this unpredictable era of climate change also requires providing mutual aid and free fares on key extreme weather days.

**Initiative 2B.1 Create a rider rewards program**

SamTrans will demonstrate its commitment to rider satisfaction by exploring ways to reward riders for their loyalty. Offering rewards to frequent riders can incentivize current riders to use transit more and encourage new riders to choose transit over other modes of travel. SamTrans will explore potential perks such as discounts, free rides, and exclusive offers to build stronger relationships with riders and boost customer retention, in addition to the Day and Month fare accumulator products that will be offered with the launch of Next Generation Clipper. SamTrans will also explore ways to provide these perks to cash-paying customers.

**Initiative 2B.2 Regularly collect and utilize rider input**

Customer preferences change over time and SamTrans will continue to administer surveys to stay up to date on these preferences to ensure services meet rider expectations. By understanding what passengers value most in their transit experience, SamTrans can tailor its services to meet these expectations, address gaps, and, when responsive to these preference changes, build community trust by showing SamTrans' commitment to its riders. SamTrans will work to ensure its existing triennial onboard survey results are parsed by race, gender, and income to ensure equity populations are represented. To combat survey fatigue and to supplement gaps in survey data, SamTrans will leverage other data collection methods, including small group interviews and discussions. SamTrans will also work to effectively communicate survey results as well as the changes that have occurred as a result of hearing from customers.

**Initiative 2B.3 Institute a robust safety culture Districtwide**

In order to continue to deliver a passenger experience that is safe and reliable, the District must uphold and maintain a culture that prioritizes and allocates resources for safety and risk-management during all phases, from transit planning and design all the way through to delivery. The District will enact a multi-pronged approach to foster a culture of safety, beginning by reviewing and updating its protocols and procedures to ensure consistency across all organizations. The District will also institute communication and training strategies to drive staff awareness and education of safety practices, including those related to zero-emission technologies and infrastructure.

**Initiative 2B.4 Support riders in navigating climate change impacts**

A changing climate is increasing the number of high heat days, flooding events, and the extent of sea level rise in San Mateo County. Intensifying weather events can make travel difficult, unpleasant, and unsafe. SamTrans wants to ensure that people can safely get where they need to go, even in the worst conditions. To ensure consistent access to rides throughout the year, SamTrans will explore options to make fares free on extreme weather days and continue to provide mutual aid to other agencies like Caltrain and BART when their services are disrupted due to climate events. The District also commits to proactively seeking new ways to respond to and support the communities it serves as climate change impacts manifest in new and unknown ways over the course of this plan.





 **Goal 3: Become an Employer of Choice**

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

Becoming an employer of choice goes hand-in-hand with being able to deliver an outstanding customer experience and improve and expand on existing services. In short, the District will be best positioned to achieve its other goals by creating an employee experience that is meaningful and inclusive, thereby attracting and retaining talent. The District will provide compensation, benefits, and on-the-job resources and facilities that attract and retain talent at every level. This also requires actively building trust and grounding everything we do in the core values of the agency.

**Objective 3A Improve the experience of being a District employee**

Regardless of whether an employee works on a bus, in a garage, or at a desk, the District is committed to ensuring employees have an outstanding work experience. Results of the 2023 employee survey showed that employees overwhelmingly want the District to prioritize improving employee recruitment and retention. The District will address this by offering a total compensation package that includes competitive salaries and benefit options.

**Initiative 3A.1 Implement recommendations from the 2024 Classification and Compensation Study**

Being an employer of choice will require the District to provide competitive salaries. The District will implement recommendations from its 2024 Classification and Compensation Study, which provides an updated job classification and total compensation structure based on market benchmarking with comparative agencies. This study will also serve as a launching point for a full organizational assessment of the District in which workforce composition and staffing, reporting structure, and distribution of responsibilities are evaluated against what is needed to support the implementation of this plan.

**Initiative 3A.2 Adapt employee benefit programs to respond to changing trends and employee needs**

The District strives to provide benefits that are current, competitive, and meet the needs of a diverse workforce. To better recruit and retain staff, the District will explore benefits that are aimed specifically at addressing what employees need, including conducting a study of the different benefit needs between administrative and field employees. These may include expanded or refined parental leave and support benefits, commuter benefit programs and incentives (e.g., travel stipends for base employees, parking cash-out programs, flexible work locations, partial telecommuting policy, allowing transit commutes to count toward work hours), and continuing to evaluate the feasibility of housing-related benefit options.

Improved commuter benefits and incentives will also reduce parking demand at District facilities and reduce environmental impacts.

**Objective 3B Build and maintain a culture of trust and recognize employee achievements**

Strong relationships are a foundation for trust and the District will create a safe environment for relationship-building across departments and working groups to begin to build this trust. The District will undertake initiatives that solicit input, provide timely follow-through, and foster employee creativity and innovation. These kinds of initiatives require leadership to be open to new ideas, but by providing formal spaces for employee input and following up with staff on their ideas, a mutually reinforcing learning process built on trust will be fostered.

**Initiative 3B.1 Standardize and widely communicate employee performance metrics and career pathways**

Employees have higher job satisfaction and perform at a higher level when performance expectations are understood and the pathway to career advancement is clear. The District will develop specific metrics and career pathways to help employees grow their careers. Managers and supervisors will also use this guidance to structure meaningful opportunities for employees and help prepare them for career advancement. Career pathways can include specific training courses and competencies/skills that employees should strive to advance in their career. Performance metrics should specify basic outputs that are expected and can be tracked along a career pathway.

The District will also analyze the possibility of tying these metrics to compensation, and the tradeoffs associated with such a structure, as a method of improving performance and building trust that employees will be recognized and rewarded for their high performance.

**Initiative 3B.2 Conduct an employee survey at regular intervals with meaningful and actionable follow-up to employees**

An employee survey, when conducted consistently and accompanied by persistent follow-up, can be a highly effective tool for building trust among the workforce. A successful employee survey process requires three key elements. First, it must be conducted at regular intervals with most questions remaining unchanged to benchmark progress. Second, there must be a strong effort, with substantial resources, dedicated to increasing response rates among employees, especially those on the front line. This includes specific strategies to collect survey responses from employees who do not work at the District HQ building and/or do not primarily perform their work on a computer.

Finally, management must be ready to widely share the results of the survey and the actions taken in response to the survey findings, with updates on progress. This may include challenging and difficult subjects or requests, but it is essential for employees to know that they are heard and their responses are valued. The District is firmly committed to this initiative and, with these three key elements in place, an employee survey will build trust over time and lead to a happier and more effective workforce.



**Initiative 3B.3 Improve transparency between executive leadership and staff**

Employees are far more likely to be inspired and capable of achieving the goals of this plan when they have a clear picture of the issues confronting executives. Communicating regularly with the workforce about these issues, and what is being done to address them, increases transparency and trust among employees. This communication should include being clear about the goals that each board has set for the CEOs, as well as the goals the CEOs have set for their executives. In addition to the regularly scheduled townhall meetings, where employees can hear updates on progress and ask questions of the CEO and other executives, new communication strategies will also be considered.

**Initiative 3B.4 Provide enhanced management training for District employees who supervise others**

More effective management is a critical ingredient to building trust among teams, incentivizing better performance, and retaining employees. It is also a skill that can often be overlooked as people advance in their career. Providing enhanced management training resources to District employees will give them the skills they need to be better supervisors, while also giving them the credentials they need to advance in their careers. Both outcomes will lead to improved employee recruitment and retention. The District should also provide guidance and tools for managing others in

a hybrid work environment, including how to better conduct meetings and make the most of in-person interactions.

**Initiative 3B.5 Foster in-person relationship-building with events and team cross-pollination opportunities**

In a hybrid work environment, the organic socialization and bonding that was once routine is disrupted. In-person events are important for engaging employees and building rapport within and across teams, including employees assigned to different locations. The District will continue its practice of developing an annual program of events and explore new opportunities for in-person relationship building and team collaborations between different business units. Events may be social, work-oriented, or specifically designed to recognize employee achievements. Opportunities for shared learning and socialization across departments should also be explored.

**Initiative 3B.6 Create an innovation challenge for employees paired with rewards**

The District benefits from the breadth and depth of experience that each employee brings to the workplace. An innovation challenge is a way for the District to encourage employee ideas that are aligned with the District's core values, help solve a problem, or further the goals of this plan. By first analyzing models at other organizations and then working collaboratively with all departments, the District will set up a program to accept employee ideas within a challenge or contest-like framework. This should include specific parameters for how these ideas can be submitted, and a promised response time for all ideas (including ideas not selected). If an idea from an employee or group of employees generates or saves money for the agency, the program should enable them to share in that reward. This will provide extra incentive for employees to think about and suggest innovations with an emphasis on cost/

benefit. This recurring challenge will help to strengthen team morale and relationship-building by encouraging creativity and will build trust and mutual respect by showing employees that management values and is open to their ideas. Ultimately, employees that feel valued are more likely to contribute ideas in the future and are more likely to be productive and happy in their jobs.

**Objective 3C Integrate diversity, equity, inclusion, and belonging (DEIB) efforts districtwide**

The District will work to integrate diversity, equity, inclusion, and belonging so that staff in every corner of the organization feel welcomed and accepted. The District will adopt specific and measurable goals to track progress in this area and invest in employee programs that foster inclusive and collaborative behaviors.

**Initiative 3C.1 Develop and adopt annual DEIB workforce goals**

Setting internal DEIB goals helps the District ensure that all employees, regardless of race, ethnicity, gender, sexual orientation, disability, age, or other characteristics, have equal access to opportunities. Developing, adopting, and tracking progress on goals for DEIB allows the District to maintain accountability to employees, passengers, and the broader community, in turn fostering trust and credibility. Annually, the District will reaffirm this commitment to a culture of social responsibility by evaluating progress and, when needed, re-evaluating initiatives to ensure it remains an inclusive and equitable place to work for all.





***Initiative 3C.2 Increase employee knowledge and understanding of DEIB by providing training and learning events***

The District can only maintain a culture of inclusion if all employees understand and practice inclusive behavior every day. By raising employee awareness of the types of practices that promote and improve DEIB, the District can foster a culture where all employees feel valued, respected, and included. The District will increase employee knowledge and understanding of DEIB topics by hosting DEIB curriculum through regular trainings and small-learning events facilitated by subject matter experts. This will ensure that these events are comfortable spaces for all to learn, listen, and be heard in an environment that fosters understanding and strengthens mutual respect.

***Initiative 3C.3 Provide tools and collaborate with employees to foster a more inclusionary workplace***

All employees have an influence on the culture of an organization, but managers often have an outsized impact on the way staff feel seen and heard. The District will evaluate where existing tools can be improved, with a focus on inclusionary management practices, and look to other peer organizations for inspiration on other best practices to provide collaboration tools for employees at every level. The District will also explore how to leverage various tools and trainings, building on the training and learning described in Initiative 3C.2, to foster an inclusionary workplace, such as providing trainings on soft skills, supporting Employee Resource Groups, and developing an academy for managers to prepare them to step into inclusive leadership roles.

**Objective 3D Provide a safe and modern workplace for all District employees**

Employee satisfaction is partially driven by feeling safe and comfortable in the workplace and when performing duties. The District will work to provide a safe and modern workplace, beginning with providing SamTrans operators with restroom access at all end-of-line and layover locations, replacing aging buildings, and developing a facilities masterplan with an eye for current and future workforce needs.

***Initiative 3D.1 Provide operator restroom access at all SamTrans end-of-line and/or layover locations***

Bus operators in the field do not always have regular access to restrooms—a critical human necessity. SamTrans' Operator Restroom Task Force will continue work to secure safe and reliable restroom access for bus operators at every bus layover and beginning and end of routes. This will include a combination of solutions based on location, including contracts for operator access to businesses, buildings, and organizations; strategically placed portable units; partnerships with other transit agencies; as well as stand-alone restrooms constructed and maintained by SamTrans. Securing these solutions will require close collaboration and partnerships with public and private property owners. The District is committed to providing all staff with the facilities, tools, and work environment they need to do their job, including access to necessary facilities.

***Initiative 3D.2 Replace existing transportation building at North Base (Building 200)***

The existing transportation building at North Base (also known as Building 200) is settling and has been for over a decade. A 2018 study recommended that the most cost-effective way to address this environmental condition is to replace the entire building. Doing so will help the District prepare for future growth of staff and operational activities, provide a safe and modern workplace for employees and improved employee amenities, enhance security features, and increase climate resilience and State of Good Repair.

***Initiative 3D.3 Relocate District Headquarters (HQ) to 166 Rollins Road in Millbrae***

The current District HQ building, an old facility built to 1970s seismic standards, is in an advanced state of disrepair and not designed for the modern workplace. The cost to bring the building up to modern standards greatly exceeds the value of the building. The District will relocate its HQ to the Gateway at Millbrae Station (166 Rollins Road), which is a modern, efficient, and transit-oriented building. The property is adjacent to the Millbrae BART and Caltrain Station, which is also served by SamTrans routes ECR and 292. The new HQ will also help to ensure the agency can recruit and retain employees. After relocation, it's important that the District maintain a State of Good Repair by budgeting and planning appropriately for ongoing operation and maintenance costs.

The District plans to retain ownership of its existing HQ site located at 1250 San Carlos Avenue in San Carlos and will work with the City of San Carlos to identify goals and objectives for the redevelopment of the site.

***Initiative 3D.4 Develop and implement an operating facilities masterplan for District and SamTrans facilities***

Creating a positive work environment requires attention to the physical comfort and safety of employees. The quality of the physical work environment directly affects employee satisfaction and morale, impacting employee retention and recruitment. Additionally, maintaining the District's facilities in a good state of repair is essential for delivering safe and reliable transit services. The District will conduct a set of studies of its operating facilities to assess and inventory existing physical facilities; identify necessary maintenance updates and improvements; and consider future needs based on growth, changes in technology, industry trends, and regulatory requirements. Recommendations for improvements or expansion to address needs will be incorporated into the Capital Improvement Program. By providing employees with a positive work environment, the District will enable employees to do their best work.



**⚓ Goal 4: Lead Responsibly**

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

"Leading Responsibly" means the District will ensure financial sustainability, commit to operational effectiveness and efficiency, and embrace a culture of continuous improvement. The District will do this by fostering a collaborative workplace where everyone from operations to administration understands the agency mission and works together to achieve it, striving towards operational effectiveness and excellence. The District will transparently communicate the progress of its initiatives outwardly to the board and the public to foster understanding, trust, and accountability. Underpinning these efforts is a commitment to environmental sustainability; by exploring processes and technologies that minimize environmental impacts and improve operational effectiveness, the District will balance financial, environmental, and operational needs.

**Objective 4A Improve internal processes**

To improve overall efficiency, function, and efficacy, the District will undertake initiatives to streamline and simplify processes, beginning with procurement and employee recruitment. These initiatives will require collaboration across all departments and cost centers to review Districtwide organizational structures to understand where there is room for improvement.

*Initiative 4A.1 Improve work efficiency of departments critical to the achievement of the goals of this plan*

As the local government organization supporting SamTrans, Caltrain, the TA, and the ELJPA, the District is focused on improving the overall efficiency of its administrative services for the benefit of all four agencies. The District will first prioritize process improvements in procurement, including consideration of separate work streams that can expedite procurement and signatory processes for projects that are not subject to federal requirements.

The organizational assessment led by the District's Human Resources (HR) department may also identify opportunities to improve work efficiencies as it relates to workforce composition and staffing, reporting structure, and distribution of responsibilities.

HR will share these findings with departments to target efforts to reduce friction in achieving organizational goals.

*Initiative 4A.2 Streamline the employee recruitment process and improve access to qualified labor pool*

Like many public agencies, the District often struggles to hire talent due to extended recruitment timelines. The District's HR department will explore technology, training, standardization, and process improvement initiatives that can reduce these timelines and improve the District's ability to hire top candidates. Streamlining the recruitment

process will improve access to a qualified labor pool along with the District's associated initiatives to provide competitive pay, benefits, and facilities to grow its position as an employer of choice. Targeted recruitment strategies that highlight these benefits will also be critical.

*Initiative 4A.3 Ensure operations and capital budgets reflect funding and staffing needed to achieve the initiatives in this plan*

To effectively realize the initiatives outlined in this plan, the District must allocate funding, staff, and resources to relevant departments that will see them through. District leadership will take the necessary steps to ensure that operational and capital budgets include sufficient funding to make steady progress on the goals of this plan. The District will also explore the potential for assigning financial analysts to each District cost center to help staff navigate the budget process and, when necessary, facilitate conversations with leadership to discuss areas where the budget and required staffing levels do not align. By providing a financial expert as a point of connection between the District and cost centers, departments and leadership will more effectively collaborate on a path forward.





**Objective 4B Ensure internal and external accountability**

The District is taking on big and exciting initiatives through this strategic plan, and will demonstrate accountability to the process by providing regular updates on progress in achieving goals. The District will further demonstrate this commitment internally and externally by maintaining standardized data for a uniform source of unbiased information, publicly communicating its budget, spending, and financial processes, and living its mission by using the transit systems it supports.

**Initiative 4B.1 Establish and integrate data standards and data sharing expectations across all District services and entities**

The District will enforce standardized data formats and sharing expectations to promote system interoperability, transparency, and efficiency in the administration of the District's services and entities. Data standardization requires consistency and accuracy in the collection, storage, and analysis of data, but also provides large benefits by creating a platform for reliable data comparison, aggregation, and reporting to decision-makers. Establishing and integrating data standards and sharing expectations will require coordination with the Business Intelligence team for integration into their external and board data reporting functions.

**Initiative 4B.2 Establish a public-facing mechanism to share how the District establishes budgets and spends funds**

As a public agency, the District is obligated to publicly report its financial standing. While the District already publishes an Annual Comprehensive Financial Report, budget, and Popular Annual Financial Report that highlights the year's budget in an easy-to-understand way, the District will work to make its budgeting and spending processes more transparent and easier to understand, particularly across its operations and those of SamTrans, Caltrain, and the TA. By fostering better understanding of funding sources and uses across all agencies in the District's purview, the District will be better able to communicate with staff and the public, fostering greater trust and accountability. One way to accomplish this is through each agency's capital improvement program and SamTrans' Measure W Budget Framework.

**Initiative 4B.3 Report on progress of achieving strategic plan goals**

To demonstrate its commitment to achieving the goals of this strategic plan, departments responsible for each initiative will establish and track metrics, implementation timelines, and regularly report on their progress. The District will use this data to provide regular updates to staff and the Board of Directors. All updates will leverage the recommendations included in this strategic plan to measure the impacts of each initiative but will also identify challenges and opportunities to refine each initiative.

**Initiative 4B.4 Incentivize employees and board members to ride the system and provide suggestions for improvement with an emphasis on customer experience**

When SamTrans employees and board members "ride the line," they are better able to understand the customer experience and

identify service gaps and issues. Riding the system regularly can help build employee pride in and responsibility for the quality of service. Additionally, passengers may have more confidence in the system knowing that employees use it too, which helps build trust with the community. The District already enables employees to ride the SamTrans system for free, but will further explore opportunities to encourage transit usage through incentives such as a parking cash-out program for employees who elect not to park at the District HQ building, a ride-along program, contests for highest department ridership, and participation in a future regional transit pass program (e.g., BayPass), if available. These behavior changes can lead to positive downstream effects, such as reducing the overall demand for parking at facilities and reduced GHG emissions.





**Objective 4C Improve internal collaboration and tools to increase effectiveness**

In this day and age, collaboration and technology go hand-in-hand. Organizations are leveraging virtual meetings, instant messaging, and collaborative project management tools to coordinate across disparate locations and teams. The District understands this integral connectivity, and is looking to operationalize the recommendations of its *IT Strategic Plan* to facilitate seamless communication. Organizational effectiveness is highly dependent on timely and accurate collaboration, meaning the District will need to refine and review its communication patterns and technologies. As the District prepares to relocate its HQ (Initiative 3D.3) and replace its transportation building at North Base (Initiative 3D.2), it will incorporate systems that allow for modern and efficient collaboration and communication.

*Initiative 4C.1 Implement recommendations from the IT Strategic Plan*

The District's *IT Strategic Plan* adopts objectives and strategies to realize priorities in the areas of IT operational excellence, accelerating technology modernization, strengthening the cybersecurity program, advancing innovation and digital transformation, and enabling data-driven decision making. The District commits to implementing the findings of the *IT Strategic Plan* to refine processes, fortify IT infrastructure, implement comprehensive security measures, establish a culture of curiosity, and establish a data governance strategy. The District will put forward staff and financial resources to the IT department to help realize these recommendations, which will have far-reaching impacts on efficiency for staff and riders alike.

*Initiative 4C.2 Develop strategy for better internal coordination of operations between North and South Bases and HQ*

It is common for transit agencies to have separate facilities for operations and administration, and SamTrans is no different. However, facilities that are blocks or miles apart often make collaboration across working groups challenging and can lead to a sense of isolation and organizational silos. Additionally, in the DEIB study, staff shared feelings of division between administration and operation staff. SamTrans will narrow the divide between its staff at its bases and headquarters by adopting strategies for improved internal coordination, team dynamics, and knowledge-sharing. The District will continue existing practices to foster a better sense of team cohesion, such as hosting townhall meetings, social events, and employee resource groups; providing office hours at North and South Bases; and exploring new ideas such as coffee

with executives and job shadowing days. Strategies to improve collaboration through technology and innovative work schedules and station set-ups will be investigated.

*Initiative 4C.3 Improve internal communications to increase organizational effectiveness*

With staff based in offices, on buses and trains, and in maintenance facilities, preferred lines of communication are understandably varied across different teams and working groups. Further, complexity from the Shared Services model in reporting lines and competition of staff resources necessitates strong and clear lines of communication.

To improve internal communications, the District will establish expectations and guidelines around adopting and using new communication channels to make real-time communication easier and more streamlined.





**Objective 4D Minimize agency pollution and resource use**

Minimizing our environmental footprint in San Mateo County through measures that lower emissions, conserve energy, and optimize resources not only enhances public health and safety outcomes but also increases the District's financial efficiency in line with its core value of sustainability. While some areas, such as environmental compliance, are legal obligations, the District will boost its reputation and lead by proactively meeting regulatory climate and air pollution goals ahead of required deadlines, such as converting SamTrans to a zero-emission bus fleet before the statewide mandate. The initiatives outlined here demonstrate the District's commitment to ensuring environmental protection, human health, and resource efficiency.

**Initiative 4D.1 Deliver the zero-emission bus transition program**

SamTrans is investing in battery electric and hydrogen fuel cell electric buses to reduce GHG emissions, fight climate change, and keep our air clean and communities healthy. With a goal to have a 100 percent zero-emission fleet by 2034, six years before California requires bus operators to make this transition, SamTrans will continue to investigate how to build, fund, and integrate electric charging and hydrogen fueling stations to support its entire bus network. SamTrans will develop a plan for the deployment of this infrastructure, as well as a funding roadmap to achieve this goal. SamTrans will lead in transparency by reporting the environmental impacts of hydrogen fuel cell electric buses and will seek opportunities to reduce hydrogen-related emissions going forward.

**Initiative 4D.2 Design and implement an Environmental Management System (EMS)**

An EMS, visualized below, will help SamTrans review its environmental goals, analyze its environmental impacts and compliance obligations, and set objectives that meet environmental and financial goals to improve operational effectiveness. As part of the design and implementation of the EMS, SamTrans will establish the level of environmental performance it wishes to achieve, including key performance indicators (KPIs), to measure progress over time. The EMS will develop, formalize, document, and train staff on SamTrans' environmental standard operating procedures, as well as create a single resource and reference for environmental operations at SamTrans.

**Initiative 4D.3 Measure, reduce and communicate the environmental impacts of agency activities**

The District commits to measuring the environmental impacts of activities on an ongoing basis, setting and meeting targets to reduce impacts. The District will refine its measurement processes to comprehensively and consistently collect data on key environmental performance indicators, foster board and public understanding of these objectives and their importance, and set definitive targets and goals to reduce overall impact and communicate progress.

**Initiative 4D.4 Monitor and exceed environmental compliance on all programs and projects**

SamTrans and Caltrain have legal obligations to comply with environmental regulations and standards and uphold sustainability policies to evaluate and improve the long-term resource efficiency of facilities and equipment, including the life cycle return on investment. Environmental compliance and resource efficiency are closely intertwined, as proactively maintained facilities and equipment can conserve energy, minimize waste, and optimize resource use, in turn supporting goals of environmental protection, compliance, and cost-savings. Both agencies will closely monitor environmental compliance and work to exceed regulatory requirements, ensuring long-term smooth operations and long-term financial sustainability.





 **Goal 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.

Strong management requires the ability to continuously learn, reflect, and grow. The District strives to provide Shared Services for its partners that are founded on collaboratively built processes that evolve and grow as circumstances change. By fostering clarity through the creation and monitoring of KPIs, metrics, and shared work plans, the District plans to measure progress on shared services so that future growth and change can be data-driven.

**Objective 5A Improve outcomes for Shared Services**

Sharing services across multiple agencies requires strong commitments on each side to collaboration and mutually agreed-upon goals but can reap major benefits for operational efficiency and effectiveness. To ensure all parties are on the same page, KPIs, metrics, and work plans should be co-created to chart a path forward that managers and leaders understand. The District embraces this process, and will provide the administrative and technical resources to analyze this data for continuous operational improvement.

***Initiative 5A.1 Develop mutually agreed-upon Shared Services Agreements to improve service delivery and clarify expectations, roles, and responsibilities***

A Shared Service Agreement (SSA) is an agreement between parties to share or use services provided by one of the parties. For the District, SSAs will define how the District supports Caltrain, SamTrans, and the TA with fully shared and partially-shared services. Shared Services included in a SSA will be defined by the District's General Manager/CEO. The SSAs will establish where critical separations must occur, such as in the case of District real estate priorities and Caltrain, and similarly in the role of the TA in the SSA. The District is committed to working through these challenges with each agency to develop an effective SSA, and will undertake continuous evaluation to ensure performance meets intended outcomes. The District will host collaborative discussions with each agency, as well as leaders from Shared Services departments, to establish agreed upon KPIs to measure the performance of SSAs.

***Initiative 5A.2 Develop metrics and work plans for tracking improvements to Shared Services outcomes***

The District will work collaboratively with the principal public transit and transportation programs to develop metrics for tracking Shared Services improvements and achieving KPI targets. Metrics will measure how well SSAs are meeting the established KPIs, and work plans will be co-created with each agency for tracking this progress. By building these metrics and work plans together, the District will foster greater clarity on how success is measured, enabling

mutually agreeable improvements to be made. Additionally, each Shared Service will establish and communicate a work plan that prioritizes the work to be completed for each agency over an agreed upon time period.

***Initiative 5A.3 Analyze and adjust staffing and resource needs for Shared Services based on work plans***

A core purpose of the District's administrative support to Caltrain, SamTrans, and the TA is efficiency optimization. Analyzing staffing and resource needs allows the District and each agency to optimize operations by ensuring efficient resource allocation. Getting this right has a direct impact on the quality of work and life balance for District employees and the quality of work that can be delivered across the District by Shared Services departments. The District will do this by reviewing co-created metrics and work plans established by Initiative 5A.2 for gaps or areas of overlap. Any proposed adjustments will be phased, first addressing SSA activities, followed by analysis and recommendations for the entire organization. As conditions change over time, the continuous monitoring of performance metrics and work plans will enable adjustments to staffing and resource allocations informed by quantified metrics and work plan progress. Adjustments to internal billing processes for Shared Services may also be needed.

**Objective 5B Continue to evaluate and improve Shared Services structure**

Excellence in our modern, rapidly changing world is built upon the ability to continuously learn, reflect, and grow. The District commits to its core values of excellence

and partnership by working collaboratively with its partners to address issues that arise with the Shared Services structure. The District will seek learning opportunities to re-evaluate Shared Services for the better provision of transit and transportation across San Mateo County and, as managing agency, the Caltrain service area.

***Initiative 5B.1 Establish process and escalation path to resolve Shared Services issues***

Even with excellent interorganizational collaboration and communication, sharing services across agencies is bound to create incongruent understandings. The key to success in these inevitable instances is a clear process for resolving disputes or challenges in a way that respects all parties and their interests. In collaboration with Caltrain, SamTrans, and the TA, the District will formulate a process and escalation path to resolve Shared Service issues so that challenges can be addressed quickly and do not balloon to impact services or broader collaborative efforts.

***Initiative 5B.2 Re-evaluate Shared Services Agreement implementation and analyze potential long-term changes to Shared Services***

After approximately five years of SSA implementation, the District will formally re-evaluate the SSA frameworks to understand what has worked well and what could be improved. The District will then develop recommendations for potential long-term changes to the SSA and supporting structures to ensure continuous improvement of the partnerships.



**Goal 6: Exercise Collective Efforts**

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

With more than two dozen different public transit operators in the Bay Area, as well as complex land use regulations and right-of-way controls, coordinating high-quality regional transit requires good faith collaboration. The District will do its part to make transportation more sustainable, accessible, and well-coordinated. It will leverage partnerships with regional taskforces, school districts, and municipalities to create a Bay Area that is easy and safe to traverse via transit. Creative implementations of TOD climate adaptation and interagency partnerships will further improve the public realm, customer experience, and the work experience of bus operators. Through these civically minded collective efforts, the District will advance mobility and land use innovation while also improving staff working conditions.

**Objective 6A Collaborate to improve local and regional transit**

SamTrans services connect to other local and regional transportation options that serve the broader Bay Area. To improve transit services for customers coming into and traveling out of its service area, the District will increase regional collaboration with other agencies through initiatives to streamline the travel experience and work with local municipalities to develop a process for right-of-first-refusal for local shuttle routes. In addition to operational partnerships, the District is looking ahead to collaborative opportunities that will better support bus operators and youth riders and will adapt to a rapidly changing climate.

**Initiative 6A.1 Participate in and dedicate resources toward regional transit coordination initiatives**

The District will prioritize participation and resource commitment to regional transit coordination efforts, particularly through the MTC's Regional Network Management

Council, in which SamTrans and Caltrain are agency partners. The District's participation in critical initiatives like Next Generation Clipper to increase payment speed and functionality, BayPass to improve regional fare integration, the Bay Area Urban Areas Security Initiative to improve public security, the Bay Area Wide Mutual Aid Agreement to enhance public health, and Paratransit Eligibility Standards to improve consistency in the paratransit eligibility process, is critical in making the region more vibrant and connected. By providing support in areas it knows best, such as service planning, fare integration, improved mapping and wayfinding, transit priority and network coordination, and accessibility, the District will maintain and grow its role as a change-agent for improved Bay Area prosperity.

**Initiative 6A.2 Improve partnerships and connectivity with local and neighboring transportation agencies and stakeholders**

SamTrans services do not exist in isolation, and many riders and operators connect to other roads and transit systems as they reach our borders—for example, Caltrain and BART are frequently used together with SamTrans for regional trips. The District will improve partnerships with local and neighboring transportation agencies and stakeholders to make transfers and connections easier, safer, and more convenient for riders. The District will also work with local municipalities to identify a process where SamTrans has right-of-first-refusal to operate new local routes and is consulted on decision-making on shuttle routes. This process can be integrated into the TA's Call-For-Projects, local/regional grant opportunities, or other programs.

SamTrans will revive its leadership of efforts like the Grand Boulevard Initiative to make communities more safe, healthy, and friendly to multimodal options. This also requires an increased level of coordination among transit security teams to share information and best practices. SamTrans will further leverage relationships with other agencies to improve the employee experience, with a particular focus on critical bus operator access to bathrooms.

**Initiative 6A.3 Partner with school districts and other stakeholders on ways to improve provision of transportation for youth**

Introducing young people to multimodal transportation options familiarizes them with transit and gives them tools to navigate their communities with more freedom and independence. Consistent ridership among youth riders will depend at least in part on safety, including access to bus stops via safe roads, crosswalks, and bikeways, which remains a critical issue for young people. SamTrans will partner with school districts and other stakeholders on safety improvements, explore free ride or discount programs for youth, and investigate options to more efficiently integrate school-oriented routes with existing routes. SamTrans will also enhance engagement and marketing efforts geared toward youth riders and school districts, such as a Back-to-School plan.





**Initiative 6A.4 Increase participation in and dedicate resources towards regional climate adaptation efforts to protect lifeline assets**

In the Bay Area, climate change has amplified storm events, accelerated sea level rise, generated hurricane-force winds, and triggered heat waves and wildfires. All these impacts are expected to increase in severity in the coming decades. The District is investing in climate adaptation planning and design efforts for its key facilities and coordinating with regional partners on their related climate adaptation efforts. As many agencies move from planning to implementation, the District will increase its engagement in regional climate adaptation efforts to ensure passengers and community lifeline assets, like transportation infrastructure, are protected from climate change impacts to the extent possible. Through regional coordination efforts, the District will take steps to budget; seek external funding and partnership opportunities; and to implement proactive, cohesive climate adaptations for its services, operations, and facilities.

**Objective 6B Support implementation and policies for transit-supportive land use in SamTrans' service area**

The transit experience does not end when riders disembark; the built environment they must navigate after (and before) stepping into a bus or rail car has a profound impact on their perceptions of transit and, in turn, impacts their likelihood to ride again. Higher-density and mixed-use developments

near transit hubs are crucial for fostering sustainable urban development. Reduced parking requirements, improved pedestrian and bicycle infrastructure, and vibrant public spaces all contribute to an enhanced transit experience and make delivering high-quality transit possible. While SamTrans does not lead land use planning and zoning, it will work to advocate and promote transit-supportive policies in its local jurisdictions' planning documents and will uphold compliance with its *Bus Stop Design Guidelines*. SamTrans will also collaborate with jurisdictions and developers that shape the built environment to enhance these public spaces for transit riders and all users.

**Initiative 6B.1 Develop and implement SamTrans Transit-Oriented Development (TOD) Policy**

While SamTrans is responsible for planning, designing, building, and operating transit service in San Mateo County, it will need to partner with local jurisdictions, community groups, and the private sector to encourage and incentivize TOD. Therefore, SamTrans will develop and implement a policy that better promotes TOD in San Mateo County. SamTrans will also seek to leverage its own infrastructure investments and assets for community development and transformation, as described in Initiative 6B.2.

**Initiative 6B.2 Advance TOD opportunities at Colma, San Carlos, Sequoia Station, and other locations**

With a TOD policy in place, SamTrans will be able to advance TOD opportunities at Colma

Park & Ride Lot, District HQ at 1250 San Carlos, and Sequoia Station in Redwood City. With the District HQ relocation to Millbrae, SamTrans will explore the redevelopment of the existing San Carlos site. The current Park & Ride lot serving Colma BART is owned by SamTrans and has been recommended for a TOD project to maximize transit ridership and support land use goals. The Sequoia Station shopping center is being considered for redevelopment by a private developer and SamTrans owns the underground parking garage. The TOD policy will also help guide how SamTrans identifies and responds to additional TOD opportunities.

**Initiative 6B.3 Work with municipal partners, Caltrans, and C/CAG to improve pedestrian and bicycle access to bus stops and along major corridors**

SamTrans operates across jurisdictional boundaries and has stops in municipalities and unincorporated areas across the county. By partnering with right-of-way owners (cities, the County, and Caltrans) through working groups such as the Grand Boulevard Initiative, and through use of the *SamTrans Bus Stop Design Guidelines*, SamTrans can support improved bicycle and pedestrian connections to and from bus stops and along major corridors. Funding and grant applications are often strengthened through interagency collaboration, and SamTrans will support applications that provide safe routes to transit for bicyclists and pedestrians. The TA will also be a leading stakeholder, especially for connections not directly served by SamTrans' bus service.





# Implementation, Monitoring & Evaluation

The District will take steps to establish a system for implementing the initiatives described in this plan; measuring, monitoring, and evaluating progress towards achieving the six strategic goals; and reporting to the organization and its stakeholders. The strategic plan will be reviewed and reported on every year to assess progress, reflect on outcomes, adjust where necessary, and outline next steps.

Each initiative will have a department or team lead assigned to develop a work plan and take steps to implement the initiative. The departments responsible for each initiative will establish an appropriate baseline, define the metrics that specifically drive understanding of progress of each initiative, and set an estimated timeframe for completion in a manner that aligns with agency resources.

The plan is meant to be dynamic and continuously evolve, and the initiatives were designed to be ambitious, yet achievable. However, the Initiative Action Matrix (refer to Appendix A) establishes, where possible,

more precise actions and projects to be implemented in support of each objective and initiative and will form the basis of the implementation program. Some initiatives in this plan are already in progress, while other new initiatives will soon become part of the District's ongoing course of business. The District will produce an annual report to track progress, identify challenges and opportunities, and refine each initiative. A comprehensive evaluation will be conducted at the five-year mark.

Adequate resourcing and budgeting are critical for successful delivery of the strategic plan's initiatives. The necessary funding and staffing should be reflected in each bi-annual budget cycle and incorporated into the District's capital improvement program and Measure W budget framework as appropriate. As part of the implementation process, department leads will also be responsible for identifying and requesting the resources (budget and staff) needed to advance the strategic plan. Should funding trade-offs be required, decisions about which initiatives to fund should be considered in the context of the District's vision, mission and key objectives.

Successful advancement of the strategic plan vision and goals will require awareness and buy-in from employees at all levels. To help achieve this, the strategic plan will be socialized Districtwide through a variety of methods such as in-person events and presentations at employee townhalls. The strategic plan framework – vision, mission, goals and core values – should be featured at all District facilities to remind employees at all levels of the big picture we are working toward, together.

Additionally, District staff should use this strategic plan to guide decision making, develop annual performance goals for teams and individuals, and inform budget and resource requests. District staff and managers should ask themselves:

- Does **this project** support the goals of the strategic plan?
- Which of **my team's projects** support the District's objectives and initiatives?
- Do my **performance goals** or that of my team members help to advance strategic plan goals or initiatives? Do they align with the strategic plan's core values?
- What **funding or resources** do I need to request, to deliver on the actions in the strategic plan for which I or my team are responsible?

By working together to advance the strategic plan's goals and initiatives, regularly reporting on progress, reflecting on outcomes and retaining the flexibility to adjust as needed, the District will be well positioned to advance our strategic vision.



# Conclusion

In closing, this 10-year strategic plan sets forth a bold vision for the future of the District, one rooted in equity, innovation, sustainability, and a deep commitment to serving its community. As the District navigates the complexities of an ever-changing landscape, it remains steadfast in its mission to work together to revolutionize mobility and create a more equitable and sustainable region.

The District's dedicated employees, partners, and stakeholders are the backbone of its success, and together, it will continue to build a transit system that not only meets the needs of today but anticipates the demands of tomorrow. By embracing new technologies, fostering equitable access, and championing sustainable practices, the District is poised to provide an exceptional mobility experience for the people and communities in San Mateo County. Thank you for your continued support and collaboration as the District embarks on this transformative journey.

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# Appendix A: Initiative Action Matrix

This Initiative Action Matrix is the first step toward building the implementation framework for the strategic plan. Each year, the District will report on the progress made toward achieving the strategic plan goals and initiatives, and identify challenges and opportunities to refine each initiative. A more comprehensive update will be made at the five-year mark.

An immediate next step is to assign a department or team lead for each initiative. With assistance from the strategic planning team, the responsible departments will establish an appropriate baseline, define the metrics that will drive understanding of progress of the specific initiative, and set an estimated timeframe for completion in a manner that aligns with agency resources. Included in the following tables are example actions/indicators that could signal progress on each initiative, and potential metrics that can be used to measure performance.



**Goal 1: Deliver Better Mobility Services**  
Expand and invest in sustainable transportation options to better meet mobility needs, reduce emissions, and improve equity.

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



**Objective 1B: Experiment and respond to the changing transportation landscape**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
1B.1	Conduct a fare policy study and continually refine fare programs to meet customer needs	<ul style="list-style-type: none"> <li>Fare study is completed and recommendations are implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Way2Go and Clipper START program participation</li> <li>Ridership growth</li> <li>Percent of riders paying by cash</li> <li>Customer satisfaction</li> </ul> </li> </ul>
1B.2	Undertake a systemwide service analysis/ comprehensive operational analysis (COA)	<ul style="list-style-type: none"> <li>COA is completed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>KPIs via monthly performance reports</li> </ul> </li> </ul>
1B.3	Continue to pilot improvements to SamTrans paratransit services	<ul style="list-style-type: none"> <li>Same-day paratransit pilot is completed and evaluated</li> <li>New pilot programs are developed, implemented and evaluated</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Ridership growth</li> <li>Cost/benefit</li> <li>Customer satisfaction</li> </ul> </li> </ul>
1B.4	Pilot a mobility wallet concept that provides Universal Basic Mobility	<ul style="list-style-type: none"> <li>Mobility wallet pilot is developed and implemented</li> <li>External funding and/or partnerships secured</li> <li>Performance metrics to be established based on program design</li> </ul>



**Goal 2: Provide Outstanding Customer Experience**  
Deliver a superior transit experience that captivates riders, fosters loyalty, and nurtures trust.

**Objective 2A: Improve the transit and paratransit rider experience**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
2A.1	Improve real-time communication to and from riders	<ul style="list-style-type: none"> <li>Real-time communication methods or tools implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Response times</li> <li>Customer satisfaction / complaints</li> </ul> </li> </ul>
2A.2	Provide high-quality real-time vehicle arrival information	<ul style="list-style-type: none"> <li>Real-time arrival signage installed at bus stops per Bus Stop Improvement Plan (BSIP)</li> <li>Real-time arrival tools identified and implemented (e.g., partnership with 3rd party app)</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of bus stops with real-time info</li> <li>Accuracy of information and usage rate</li> </ul> </li> </ul>
2A.3	Enhance digital and physical customer communication	<ul style="list-style-type: none"> <li>Public website (e.g., accessibility, readability), system maps, and field signage improved</li> <li>Continued participation in regional initiatives (e.g., mapping and wayfinding)</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Ridership growth, transfers, travel time</li> <li>Customer satisfaction</li> </ul> </li> </ul>
2A.4	Implement transit-supportive infrastructure projects	<ul style="list-style-type: none"> <li>Countywide transit priority study completed and recommendations starting to be implemented</li> <li>External funding/partnerships secured</li> <li>BSIP recommendations implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of improvements made</li> <li>Ridership growth, travel time improvements, on-time performance</li> <li>Amount of external funding secured</li> </ul> </li> </ul>
2A.5	Pilot the use of paid ambassadors	<ul style="list-style-type: none"> <li>Paid ambassador pilot program is designed and implemented</li> <li>Performance metrics to be established based on program design</li> </ul>



**Objective 2B: Build trust and boost rider loyalty**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
2B.1	Create a rider rewards program	<ul style="list-style-type: none"> <li>Pilot program designed, implemented, evaluated</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Ridership growth (total, frequency, new riders)</li> <li>Customer satisfaction</li> </ul> </li> </ul>
2B.2	Regularly collect and utilize rider input	<ul style="list-style-type: none"> <li>Surveys and small group interviews conducted</li> <li>Data tracked over time and findings utilized</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Adherence to survey/small group interview schedule</li> <li>Survey participation rate and equitable representation</li> </ul> </li> </ul>
2B.3	Institute a robust safety culture Districtwide	<ul style="list-style-type: none"> <li>Safety study completed and recommendations implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of recommendations implemented</li> <li>Number of safety trainings</li> <li>Number of safety incidents</li> <li>Survey responses (safety questions)</li> </ul> </li> </ul>
2B.4	Support riders in navigating climate change impacts	<ul style="list-style-type: none"> <li>Program designed and launched</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of instances when mutual aid was offered</li> <li>Ridership/participation in free fare days</li> </ul> </li> </ul>



**Goal 3: Become an Employer of Choice**

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

**Objective 3A: Improve the experience of being a District employee**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
3A.1	Implement recommendations from the 2024 Classification and Compensation Study	<ul style="list-style-type: none"> <li>Study completed and recommendations implemented</li> <li>Next steps / further action identified</li> </ul>
3A.2	Adapt employee benefit programs to respond to changing trends and employee needs	<ul style="list-style-type: none"> <li>Study completed and recommendations implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Employee satisfaction</li> <li>Employee retention rates</li> <li>Successful recruitments</li> </ul> </li> </ul>

**Objective 3B: Build and maintain a culture of trust and recognize employee achievements**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
3B.1	Standardize and widely communicate employee performance metrics and career pathways	<ul style="list-style-type: none"> <li>Performance management system implemented</li> <li>Career pathways and metrics developed</li> <li>Materials and training rolled out</li> </ul>
3B.2	Conduct an employee survey at regular intervals with meaningful and actionable follow-up to employees	<ul style="list-style-type: none"> <li>Employee surveys conducted regularly</li> <li>Changes based on surveys widely communicated</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Survey response rate</li> </ul> </li> </ul>
3B.3	Improve transparency between executive leadership and staff	<ul style="list-style-type: none"> <li>Additional tools / methods developed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Frequency / regularity of communications</li> <li>Number of events / touch points</li> <li>Employee survey responses</li> </ul> </li> </ul>
3B.4	Provide enhanced management training for District employees who supervise others	<ul style="list-style-type: none"> <li>Management training program developed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of trainings offered</li> <li>Attendance rates</li> </ul> </li> </ul>
3B.5	Foster in-person relationship-building with events and team cross-pollination opportunities	<ul style="list-style-type: none"> <li>Program of in-person events designed and implemented</li> <li>Metrics could include:                             <ul style="list-style-type: none"> <li>Number of events and attendance</li> <li>Employee feedback</li> </ul> </li> </ul>
3B.6	Create an innovation challenge for employees paired with rewards	<ul style="list-style-type: none"> <li>Challenge designed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of participants</li> <li>Number of ideas that are implemented</li> </ul> </li> </ul>



**Objective 3C: Integrate diversity, equity, inclusion, and belonging (DEIB) efforts districtwide**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
3C.1	Develop and adopt annual DEIB workforce goals	<ul style="list-style-type: none"> <li>Goals adopted, metrics established and tracked regularly</li> <li>Performance metrics would reflect the DEIB goals established with this initiative</li> </ul>
3C.2	Increase employee knowledge and understanding of DEIB by providing training and learning events	<ul style="list-style-type: none"> <li>Training program and learning events developed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of trainings offered</li> <li>Attendance rate at DEIB learning events</li> <li>Survey responses (employee knowledge and understanding of DEIB)</li> </ul> </li> </ul>
3C.3	Provide tools and collaborate with employees to foster a more inclusionary workplace	<ul style="list-style-type: none"> <li>Tools/collaboration opportunities implemented and widely shared</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Participation in Employee Resource Groups (ERGs)</li> <li>Number of partnerships with Community Based Organizations (CBOs)</li> </ul> </li> </ul>

**Objective 3D: Provide a safe and modern workplace for all District Employees**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
3D.1	Provide operator restroom access at all SamTrans end-of-line and/or layover locations	<ul style="list-style-type: none"> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Percent of end-of-line/layover locations with restroom access for full span of service</li> <li>Number of restrooms upgraded</li> <li>Number of new contracts secured</li> <li>Number of new restrooms constructed</li> <li>Number of new portables/trailers installed</li> <li>Performance and use of mobile app</li> </ul> </li> </ul>
3D.2	Replace existing transportation building at North Base (Building 200)	<ul style="list-style-type: none"> <li>Building replacement proceeds according to project schedule</li> <li>Temporary workspace is secured</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Project schedule and budget</li> </ul> </li> </ul>
3D.3	Relocate District Headquarters (HQ) to 166 Rollins Road in Millbrae	<ul style="list-style-type: none"> <li>HQ tenant improvements completed</li> <li>HQ move (assets and employees) completed</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Project schedule and budget</li> </ul> </li> </ul>
3D.4	Develop and implement an operating facilities masterplan for District and SamTrans facilities	<ul style="list-style-type: none"> <li>Initial studies completed (NB/SB Conditions Needs Assessment; SamTrans Operating Facilities Assessment)</li> <li>Masterplan developed and projects/ recommendations defined</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Programming / funding of project recommendations through CIP and budget process</li> <li>Reduction in deferred maintenance needs</li> </ul> </li> </ul>



**Goal 4: Lead Responsibly**  
**Build a fiscally responsible, accountable, and highly effective organization.**

**Objective 4A: Improve internal processes**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
4A.1	Improve work efficiency of departments critical to the achievement of the goals of this plan	<ul style="list-style-type: none"> <li>Improvements identified, solutions designed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Time / cost savings</li> <li>Improved outcomes</li> </ul> </li> </ul>
4A.2	Streamline the employee recruitment process and improve access to qualified labor pool	<ul style="list-style-type: none"> <li>Improvements identified, solutions designed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Recruitment timeline</li> <li>Number of qualified applicants per position</li> <li>Successful recruitment rates</li> </ul> </li> </ul>
4A.3	Ensure operations and capital budgets reflect funding and staffing needed to achieve the initiatives in this plan	<ul style="list-style-type: none"> <li>Funding and staffing reflected in agency budgets at correct timepoints for plan initiatives</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of initiatives funded</li> </ul> </li> </ul>

**Objective 4B: Ensure internal and external accountability**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
4B.1	Establish and integrate data standards and data sharing expectations across all District services and entities	<ul style="list-style-type: none"> <li>Standards are developed and implemented</li> <li>Information / training on new standards widely distributed</li> </ul>
4B.2	Establish a public-facing mechanism to share how the District establishes budgets and spends funds	<ul style="list-style-type: none"> <li>Public-facing mechanism (e.g., dashboard or webpage) developed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Feedback from riders and the public</li> </ul> </li> </ul>
4B.3	Report out on progress of achieving strategic plan goals	<ul style="list-style-type: none"> <li>Baselines, KPIs and targets established</li> <li>Annual progress reports created and shared with Board and public</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Frequency of progress reports</li> </ul> </li> </ul>
4B.4	Incentivize employees and board members to ride the system and provide suggestions for improvement with an emphasis on customer experience	<ul style="list-style-type: none"> <li>Program and process for submitting recommendations developed</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Participation rate (board members, employees)</li> <li>Number of routes / percent of routes traveled</li> <li>Number of improvements implemented</li> </ul> </li> </ul>



**Objective 4C: Improve internal collaboration and tools to increase effectiveness**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
4C.1	Implement recommendations from the <i>IT Strategic Plan</i>	<ul style="list-style-type: none"> <li>Recommendations programmed in CIP and bi-annual capital/operating budgets</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of recommendations funded/implemented</li> </ul> </li> </ul>
4C.2	Develop strategy for better internal coordination of operations between North and South Bases and HQ	<ul style="list-style-type: none"> <li>Strategy with KPIs developed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Progress on KPIs</li> <li>Employee survey responses (communication, trust, satisfaction)</li> </ul> </li> </ul>
4C.3	Improve internal communications to increase organizational effectiveness	<ul style="list-style-type: none"> <li>Tools and techniques developed and implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Frequency / consistency of communication</li> <li>Employee survey responses (communication, trust, satisfaction)</li> </ul> </li> </ul>

**Objective 4D: Minimize agency pollution and resource use**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
4D.1	Deliver the zero-emission bus transition program	<ul style="list-style-type: none"> <li>External funding is secured</li> <li>Zero-emission infrastructure projects completed in time for full fleet transition</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Percent completion of infrastructure projects</li> <li>Amount of external funding secured</li> </ul> </li> </ul>
4D.2	Design and implement an Environmental Management System (EMS)	<ul style="list-style-type: none"> <li>EMS designed and implemented</li> <li>KPIs developed for environmental and financial goals</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Reduction in agency costs and environmental impacts</li> </ul> </li> </ul>
4D.3	Measure, reduce and communicate the environmental impacts of agency activities	<ul style="list-style-type: none"> <li>Environmental scorecard KPIs and metrics are developed and tracked</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Progress on KPIs</li> <li>Reduction in agency costs and environmental impacts</li> </ul> </li> </ul>
4D.4	Monitor and exceed environmental compliance on all programs and projects	<ul style="list-style-type: none"> <li>Environmental audits conducted and corrective action reports developed</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of environmental audits conducted</li> <li>Reduction in agency costs and environmental impacts</li> </ul> </li> </ul>



**Goal 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.

**Objective 5A: Improve outcomes for shared services**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
5A.1	Develop mutually agreed-upon Shared Services Agreements to improve service delivery and clarify expectations, roles, and responsibilities	<ul style="list-style-type: none"> <li>Shared Services Agreements executed</li> </ul>
5A.2	Develop metrics and work plans for tracking improvements to Shared Services outcomes	<ul style="list-style-type: none"> <li>Metrics and work plan established</li> <li>Metrics are tracked and reported on to Shared Services stakeholders</li> </ul>
5A.3	Analyze and adjust staffing and resource needs for Shared Services based on work plans	<ul style="list-style-type: none"> <li>Report developed and recommendations implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of recommendations implemented</li> </ul> </li> </ul>

**Objective 5B: Continue to evaluate and improve Shared Services structure**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
5B.1	Establish process and escalation path to resolve Shared Services issues	<ul style="list-style-type: none"> <li>Process / escalation path established and followed</li> </ul>
5B.2	Re-evaluate Shared Services Agreement implementation and analyze potential long-term changes to Shared Services	<ul style="list-style-type: none"> <li>Progress / status report developed, based on metrics and workplan (see Initiative 5A.2)</li> <li>Recommendations implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of recommendations implemented</li> </ul> </li> </ul>





**Goal 6: Exercise Collective Efforts**  
Collaborate across the region to improve transit and land use in service of greater mobility.

**Objective 6A: Collaborate to improve local and regional transit**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
6A.1	Participate in and dedicate resources toward regional transit coordination initiatives	<ul style="list-style-type: none"> <li>Staff participation in regional efforts such as:                             <ul style="list-style-type: none"> <li>Regional Network Management</li> <li>Regional Mapping and Wayfinding</li> <li>Regional Transit Priority</li> <li>Regional Fare Integration</li> <li>Other Transit Transformation Action Plan staff working groups</li> </ul> </li> </ul>
6A.2	Improve partnerships and connectivity with local and neighboring transportation agencies and stakeholders	<ul style="list-style-type: none"> <li>Continued participation in regional connectivity initiatives such as:                             <ul style="list-style-type: none"> <li>Interagency transfer pilot program</li> <li>Bay Area TRANSFER plan</li> <li>Transit 2050+</li> <li>Regional Mapping and Wayfinding</li> </ul> </li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Improved customer satisfaction</li> <li>Increased ridership</li> <li>Increased interagency transfers</li> <li>Reduced travel time and/or cost for riders</li> </ul> </li> </ul>
6A.3	Partner with school districts and other stakeholders on ways to improve provision of transportation for youth	<ul style="list-style-type: none"> <li>Study conducted and recommendations implemented</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Increased youth ridership</li> <li>Increased distribution of Youth Unlimited passes</li> </ul> </li> </ul>
6A.4	Increase participation in and dedicate resources towards regional climate adaptation efforts to protect lifeline assets	<ul style="list-style-type: none"> <li>Continued participation in Regional Climate Collaborative</li> <li>Participation in new regional climate adaptation partnerships</li> <li>Progress on high-priority resilience projects (e.g., sea level rise adaptation), with an emphasis on partnership opportunities</li> </ul>

**Objective 6B: Support implementation and policies for transit-supportive land use in SamTrans' service area**

Initiative	Purpose/Description	Example Progress Indicators & Performance Metrics
6B.1	Develop and implement SamTrans Transit-Oriented Development (TOD) Policy	<ul style="list-style-type: none"> <li>TOD policy approved by Board</li> <li>Future projects consistent with TOD policy</li> </ul>
6B.2	Advance TOD opportunities at Colma, San Carlos, Sequoia Station and other locations	<ul style="list-style-type: none"> <li>TOD projects advanced through the project development and delivery stage, in a manner consistent with TOD policy</li> </ul>
6B.3	Work with municipal partners, Caltrans, and C/CAG to improve pedestrian and bicycle access to bus stops and along major corridors	<ul style="list-style-type: none"> <li>Increased participation in transportation planning and development process led by others</li> <li>Partnerships on grants / external funding</li> <li>Performance metrics could include:                             <ul style="list-style-type: none"> <li>Number of new ped/bike improvements</li> <li>Number of successful grant applications</li> </ul> </li> </ul>

# Appendix B: Interviewees

## Partner Organizations

Ramakrishna Pochiraju & Michael Eshleman, Alameda-Contra Costa Transit District (AC Transit)

Bob Powers, Bay Area Rapid Transit (BART)

Michelle Bouchard, Caltrain

John Ford, Commute.org

Andy Fremier, Metropolitan Transportation Commission (MTC)

Jeff Tumlin, San Francisco Municipal Transportation Agency (SFMTA)

Carolyn Gonot, Santa Clara Valley Transportation Authority (VTA)

## Peer Organizations

Joanna Pinkerton, Central Ohio Transit Authority

Deborah Leous, Pinellas Suncoast Transit Authority

Henri Li, Shelly Valenton, & Chris Flores, Sacramento Regional Transit District

## Thought Leader

David King, School of Geographical Sciences and Urban Planning, Arizona State University





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