San Francisco TDM Plan

2017 - 2020

SFMTA
Municipal
Transportation
Agency

SF Environment
Our home. Our city. Our planet.
A Department of the City and County of San Francisco

SAN FRANCISCO
PLANNING
DEPARTMENT

Acknowledgments

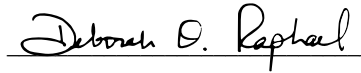Many of the City and County of San Francisco's guiding documents recognize that infrastructure investments alone cannot create the transportation conditions that provide for a vibrant and environmentally sustainable city. This plan is San Francisco's commitment to holistically providing and pursuing Transportation Demand Management measures, including transportation system pricing, incentives, marketing and regulatory policy to ensure that all transportation choices and trade-offs are clear to San Francisco's residents, employees, and visitors.

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EXECUTIVE SUMMARY

> **GOAL: A SUCCESSFUL TDM PROGRAM WILL SERVE AS A KEY COMPONENT IN CREATING AND FOSTERING AN ENVIRONMENT WHERE PUBLIC TRANSPORTATION, WALKING, BIKING, AND SHARED RIDES ARE THE PREFERRED MEANS OF TRAVEL FOR MOST TRIPS IN SAN FRANCISCO.**

San Francisco is an attractive place to live, work, and play because it offers so much to such a wide variety of people. As a vibrant, busy city, San Francisco faces challenges with how to accommodate expected growth within the constraints of a world-class location that has already developed most of its available land. As the city increases in density, transportation, and land-use planners are looking to make the city work better for the people who are here, as well as those who will be here in the future. Due to the costs of building major infrastructure, San Francisco is looking to do more with our existing system, while focusing on key important projects like the Central Subway and Van Ness Bus Rapid Transit. In order to succeed, an ambitious transportation demand management program is needed to meet the challenge of maintaining mobility and access within the city.

This Transportation Demand Management (TDM) Plan, based on the 2014 Interagency Transportation Demand Management Strategy, outlines the policies, projects, and programs the City and County of San Francisco will employ as part of a comprehensive effort to ensure access and mobility for all. This work would mainly engage the efforts of four key partner agencies: San Francisco Municipal Transportation Agency (SFMTA), San Francisco County Transportation Authority (SFCTA), San Francisco Planning Department (SF Planning), and the San Francisco Department of the Environment (SF Environment).

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> **PROGRAM VISION: IT IS EASY FOR EVERYONE TO GET AROUND BY TRANSIT, WALKING, BIKING, AND SHARED RIDES AS THE PREFERRED MEANS OF TRAVEL AND THAT THEY ARE ACCESSIBLE TO ALL USERS.**

Background

In 1973, San Francisco passed a "Transit First" policy, and the city has continued to prioritize public transportation, walking, and bicycling when determining how to best use limited street space and public thoroughfares. Voters have repeatedly supported an integrated approach that emphasizes sustainable modes. In 2014, San Francisco voters passed two funding measures that improve public transit and build safer streets in neighborhoods citywide. More recently, in 2016, San Francisco voters reasserted their trust in transportation officials by voting down another ballot measure, depoliticizing the work of the SFMTA. Time and time again, San Francisco voters have reaffirmed the city's transportation planning direction and supported environmentally-superior transportation options.

Consistent with the Interagency TDM Strategy[1], the TDM Plan's effectiveness will be evaluated by tracking changes in solo driving, measured by single occupancy vehicle (SOV) trips. We will also report on changes in transportation behavior demonstrated by other key metrics such as total driving or Vehicle Miles Traveled (VMT) and greenhouse gas emissions (GHGs). The full report includes a discussion of how we define program success and measure effectiveness, including a detailed methodology (Appendix B).

DEFINITIONS

Carshare – individual vehicles that are used by multiple people. They can be a single occupancy vehicle or a shared ride depending on their use.

Shared Vehicle (Shared-Use Vehicle) – vehicles with multiple passengers, includes carpool and private transit that has a minimum occupancy of 4 or more passengers 85% of the time.

Ride Hail Services – (Ride Sourcing) services that are hailed either on-street or via phone or phone/computer application.

Shared Rides (Rideshare) – trips in vehicles with multiple passengers, includes carpool and private transit that has a minimum occupancy of 4 or more passengers 85% of the time.

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1   The Interagency TDM Strategy was created by the SFMTA, SFCTA, SF Environment, and SF Planning in 2014. Available upon request.

INTRODUCTION

TDM Explained

Transportation Demand Management encompasses a set of low-cost, tools and near-term strategies that encourage the use of sustainable transportation options while improving the efficiency of the transportation system and reducing crowding on transit. TDM constitutes a layer of information, programs, and policies that make the available options for sustainable transportation choices more appealing and easy to use. Done well, TDM elevates residents', workers', and visitors' knowledge of and experience with the variety of transportation options available, builds a constituency in support of making the transportation system more sustainable and reinforces wider transportation goals in the city and region.

TDM includes the following key functions:

- **Provides easily accessible information** about sustainable travel choices through effective user interfaces;

- **Encourages and incentivizes** desired mode shift away from single occupant vehicle trips;

- **Improves the efficiency** of the transportation system by managing the demand for transportation facilities and services;

- **Affects and complements** mixed-use compact land use; and

- **Employs market pricing** to remove the hidden costs of the use of single occupant vehicles and barriers to active and collective transportation modes (e.g., through parking management, vehicle circulation, off-board fare programs, user amenities, etc.)

TDM GOAL 1: MAKE IT EASY FOR RESIDENTS, EMPLOYEES, AND VISITORS TO TRAVEL BY TRANSIT, FOOT, BIKE, RIDESHARE OR CARSHARE WHEN TRAVELING TO, FROM, AND WITHIN SAN FRANCISCO.

TDM GOAL 2: INSTITUTIONALIZE A CULTURE THAT EMBRACES WALKING, BICYCLING, TAKING TRANSIT AND RIDESHARING.

TDM GOAL 3: COLLABORATE ON A WIDE VARIETY OF INITIATIVES TO LEVERAGE THE IMPACT OF TDM.

TDM GOAL 4: ENSURE AND PRIORITIZE EFFECTIVE PROGRAMS THROUGH MONITORING AND EVALUATION.

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About San Francisco

Transportation has a significant impact on individual quality of life. The time spent commuting is often time that could be spent with family and friends or on important but discretionary activities. Most people care most about how quickly they can travel from point A to point B and/or the experience of the travel. Convenience, cost, experience, and travel time are major factors determining how people choose to get around.

People who travel in San Francisco know that the city's roads, bridges, and transit lines can be congested and sometimes struggle to operate effectively when they are over capacity. The city is in the midst of another era of high population growth and development. The city's population is expected to grow by 280,000 people and add 100,000 new households by 2040. Additionally, San Francisco is the dominant employment center in the Bay Area and is projected to add as many as 190,000 jobs by 2040.

As one of the nation's top travel destinations, tourists bring many economic and cultural benefits. However, tourism also creates additional demand on the city's transportation network. In 2013, San Francisco hosted 16.9 million visitors, including Bay Area visitors driving in for the day and those staying outside the city, but whose primary destination was San Francisco. A 2010 survey found that most visitors–nearly half–used a personal or rental car to travel around the city. These millions of annual car trips can have major impacts on the operation of the city's streets and neighborhoods, as well as air quality, quality of life, economic viability, public health, and other significant impacts.

San Francisco is an attractive place to live, work and visit because it offers so much to such a wide variety of people. As such, maintaining mobility—the ability for people to get where they are going in a reasonable amount of time—continues to be a challenge that must be faced head-on. With growth and development, this challenge will become even greater in future years. To ensure that people can safely and efficiently reach their destinations, the city develops and implements an ongoing comprehensive, cohesive TDM program. The program aims to support travel by transit, bicycling, walking, and shared rides and reduce the need for SOV travel to, from, and within the city while also creating a culture that embraces sustainable transportation alternatives. Developing a TDM program also complements the city's longer-term capital investment strategy by providing more affordable, near-term, 'non-infrastructure' strategies to help meet our safety, equity, and environmental goals.

About the Plan

The TDM Plan builds upon existing efforts to develop, implement and manage a coordinated Transportation Demand Management program that will make it easy for residents, employees, and visitors to use all available transportation

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options, other than driving alone, to meet their travel needs. This effort will include a suite of programs, services, and communications, based on best practices, linked through an identifiable, well-known brand, and will be reinforced by strong policies that support the reduction of SOV trips into and within San Francisco.

The full report includes specific objectives for each goal. The full report also describes the key overall responsibilities of the four main agencies (SFMTA, SFCTA, SF Planning, and SF Environment), other agencies, and the role of private entities.

Although the TDM Plan focuses on describing work led by City and County of San Francisco agencies, many other organizations play an important role in TDM, including employers, developers, Transportation Management Associations (TMAs), the hospitality industry, transportation advocacy organizations, community-based organizations, regional transportation and air quality agencies and many others.

In support of these, the resulting program will focus in on three specific areas:

Land-use development programs and policies: Developing and implementing policies that shape future trips associated with new development and major changes in use; includes monitoring and evaluation of compliance with approved TDM measures.

Street management programs and policies: Developing and implementing policies and programs that maximize efficient use of street space and support the benefits of, and minimize, the negative impacts of high occupancy vehicles (e.g. private shuttles, tour buses, and ride hail services).

Customer-focused campaigns and programs: Providing information and services to visitors, residents, and employees/employers that promote and encourage walking, biking, public transit use, and shared vehicles and rides.

The full report outlines strategies and actions that reinforce desired travel behavior changes through multiple channels, including policies and outreach aimed at employers, employees, residents, visitors, schools, and other audiences. The strategies are designed to be both aspirational and attainable, and call for action in both the short- and long-term. They build toward our goals, capitalize on our strengths, and consider opportunities for citywide and intra-agency collaboration.

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The full report outlines a framework for how the city will ensure that the messages and programs developed to employ a unified voice and are based on the same vision, objectives, and data, and are supported by a long-term commitment from the city.

Implemented together, TDM strategies can be a powerful tool to shift travel behavior. As San Francisco endeavors to develop a world-class TDM program that will efficiently and effectively reduce SOV use in San Francisco, the strategies outlined in this document put San Francisco on the path to achieving this aim.

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STRATEGY 1: *DEVELOP PROGRAM INFRASTRUCTURE FOR PUBLIC ENGAGEMENT.*

STRATEGY 2: *PROPOSE AND ADVOCATE FOR STRONG POLICIES THAT REDUCE SOV TRIPS INTO, THROUGH AND WITHIN SAN FRANCISCO.*

STRATEGY 3: *ADVOCATE FOR AND SUPPORT PROGRAMS, TOOLS, AND SERVICES THAT ENHANCE AND IMPROVE COORDINATION OF REGIONAL TRANSPORTATION.*

STRATEGY 4: *MONITOR, EVALUATE AND ENFORCE CONDITIONS OF DEVELOPMENT PROJECT APPROVAL.*

STRATEGY 5: *DEVELOP MATERIALS THAT PROVIDE INFORMATION ABOUT SERVICES, PRODUCTS, AND PROGRAMS.*

STRATEGY 6: *DEVELOP VISITOR-ORIENTED AND EVENT-RELATED TDM SERVICES TO FACILITATE AND ENCOURAGE VISITORS' UNDERSTANDING AND USE OF SUSTAINABLE OPTIONS WHEN IN SAN FRANCISCO.*

STRATEGY 7: *DEVELOP PROGRAMS FOR EMPLOYER AND RESIDENTIAL COMMUNITIES TO ENSURE RESIDENTS/EMPLOYEES ARE FULLY AWARE OF THEIR TRANSPORTATION OPTIONS.*

STRATEGY 8: *STRENGTHEN PARTNERSHIP WITH SCHOOLS TO ENHANCE SCHOOL AND FAMILY-FOCUSED PROGRAMMING.*

STRATEGY 9: *INCUBATE INNOVATIVE POLICIES AND PROGRAMS AND EXPLORE THEIR FEASIBILITY TO FURTHER TDM GOALS.*

STRATEGY 10: *FACILITATE TRANSPORTATION EQUITY THROUGH TARGETED PROVISION OF EDUCATION AND ENCOURAGEMENT FOR MINORITY, LOW-INCOME, DISABLED, AND SENIOR POPULATIONS TO TAKE TRANSIT, WALK, BIKE, USE RIDESHARE OR CARSHARE.*

STRATEGY 11: *CREATE/FORMALIZE ACTIVE TRANSPORTATION (WALKING AND BICYCLING) ENCOURAGEMENT PROGRAMS.*

STRATEGY 12: *RESEARCH AND EVALUATE TDM STRATEGIES TO DEVELOP A STRONGER, MORE EFFECTIVE PROGRAM.*

The full report includes significant additional detail on each strategy, including a list of key actions and which agencies will play lead and supporting roles to pursue them. The report distinguishes between near-term and longer-term actions and sets out a protocol by which agencies collaborate to move actions forward.

MISSION, PARTNERSHIPS, GOALS & OBJECTIVES

> **PROGRAM MISSION: REDUCE DEPENDENCY ON SINGLE OCCUPANCY VEHICLES USE IN SUPPORT OF A VIBRANT AND LIVABLE CITY THROUGH THE PROVISION OF TDM PROGRAMS, SERVICES AND POLICIES TO SAN FRANCISCO RESIDENTS, EMPLOYEES AND VISITORS.**

Partners

In 2014, the city committed to developing a new structure for the city's mobility management offerings. This new structure emphasizes highly coordinated, comprehensive activities to support the city's TDM goals of reducing single occupant vehicle trips. There are four organizations that have a responsibility/accountability for transportation planning and operations. They are: San Francisco Municipal Transportation Agency (SFMTA), San Francisco County Transportation Authority (SFCTA), San Francisco Planning Department (SF Planning), and the San Francisco Department of the Environment (SF Environment).

The SFMTA is responsible for overall management of San Francisco's transportation systems, including such roles as ensuring that San Francisco's streets work for all users, managing access to curb space, managing public vehicle and bicycle parking, operating Muni and overseeing taxi services, among others. The SFMTA is held accountable by the public and decision-makers for the smooth functioning of the transportation system and therefore has a special responsibility to ensure that TDM programs are implemented effectively.

The SFCTA is the county congestion management agency, a statutory role that requires bi-annual performance monitoring and strategic planning and policy development, consistent with the agency's long-range county-wide transportation plan. The SFCTA also funds a wide range of TDM programs and leads San Francisco's regional managed lanes and variable pricing/incentives work on Treasure Island and with BART.

SF Environment has a unique set of official duties as the county coordinator of 511 Rideshare and oversight of the San Francisco Commuter Benefits Ordinance, Tenant Bicycle Access in Existing Commercial Building Ordinance and the Emergency Ride Home program.

SF Planning shapes the future of San Francisco and the region by: generating an extraordinary vision for the General Plan and in neighborhood plans; fostering exemplary design through

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planning controls; improving our surroundings through environmental analysis; preserving our unique heritage; encouraging a broad range of housing and a diverse job base; and enforcing the Planning Code. The department is responsible for the city's development-review and approval related TDM policies, such as the Transportation Sustainability Fee (TSF) and the related TDM Ordinance.

Additionally, there are agencies/departments that have an important policy or programmatic connections to transportation including the San Francisco Department of Public Health (public health, equity, sustainability, and Safe Routes to School program) and the San Francisco Unified School District (school transportation issues/education). Several regional agencies have a role in TDM including regional transit agencies (BART, Caltrain, AC transit, among others), Metropolitan Transportation Commission (MTC), Bay Area Air Quality Management District (BAAQMD), and many others.

Finally, there are numerous private entities and nonprofits who contribute to TDM or deliver transportation services and programs, including large employers, private transportation providers, TMAs, advocates, developers, and others.

The Inter-Agency Strategy for Transportation Demand Management can be referenced for more details on the guiding strategy for program development and some of the programmatic focus points. The TDM Plan commits each partner agency to ensuring that other partners have the opportunity to provide meaningful and impactful input into TDM planning in order to meet the Plan's goals, requirements, and needs of each agency's charge.

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Guiding Principles

The partner agencies endeavor to create a world-class TDM program that will efficiently and effectively reduce SOV use in San Francisco. To ensure this outcome, we identified 10 guiding principles to help inform the policies and programs that make up the city's comprehensive TDM program. These principles demonstration the city's commitment to San Francisco residents, visitors and commuters to develop a TDM program that makes walking, biking, transit, and shared rides more convenient and cost-effective.

GUIDING PRINCIPLES

1. All users should have access to information that makes choices clear (including costs).

2. People of all ages, income levels, ethnic backgrounds, and abilities should be able to conveniently travel by transit, walking, biking, and/or shared vehicle.

3. Use of multiple modes for trips should be easy/clear.

4. New developments should ensure that sustainable modes are prioritized as transportation options.

5. The city should partner with private sector and community groups to help reduce SOV use.

6. All travelers should be treated equally and provided with clear and easy choices.

7. Programs should be comprehensive and reinforce desired travel behavior changes through multiple channels and be made available in multiple languages.

8. Supportive policies should be a strong component of the program as they are needed to ensure measurable change.

9. TDM requirements of existing and new developments should be monitored and enforced.

10. Comprehensive, systematic evaluation and reporting on the effectiveness of city TDM programs should be standard, transparent, and inform future work.

Goals & Objectives

The SFMTA Strategic Plan identifies goals and objectives that guide decision-making and provide the overarching direction of the citywide plan. The SFCTA also discusses TDM as a core policy initiative in its county-wide long-range plan known as the San Francisco Transportation Plan and other initiatives. San Francisco's TDM strategy goals are described in the 2014 Interagency TDM Strategy. Additionally, the TDM Plan supports the goals identified in numerous city policy documents and strategies, including the General Plan, Climate Action Strategy, Vision Zero and the San Francisco Planning Code, among others.

MISSION, PARTNERSHIPS, GOALS & OBJECTIVES

GOAL 1: Make it easy for residents, employees, and visitors to travel by transit, foot, bike, rideshare or carshare when traveling to, from, and within San Francisco.

Objective 1a: Provide high-quality TDM programs and services to San Francisco residents, employees, businesses, schools, and visitors.

Objective 1b: Ensure that TDM information and services are presented in a culturally sensitive manner and are accessible to and can be obtained by people of all incomes, abilities, and ages.

Objective 1c: Develop innovative TDM policies, programs and services.

GOAL 2: Institutionalize a culture that embraces walking, bicycling, taking transit and ridesharing.

Objective 2a: Increase awareness and support of, and comfort with, the use of non-SOV transportation options by residents, employees, employers, and visitors.

Objective 2b: Remove policy and cultural barriers to the use of transportation options.

Objective 2c: Increase awareness of the power of TDM efforts and support of a strong TDM program by government agencies, elected officials, and community leaders.

GOAL 3: Collaborate on a wide variety of initiatives to leverage the impact of TDM.

Objective 3a: Work with city and private partners to incorporate TDM into programs and projects across San Francisco as appropriate.

Objective 3b: Promote and educate to develop an understanding of the economic, environmental, social and health benefits of TDM and use TDM support city goals in these areas when not in conflict with transportation goals.

Objective 3c: Maximize the use of sustainable transportation options for trips generated by new development.

Objective 3d: Collaborate with regional partners.

GOAL 4: Ensure and prioritize effective programs through monitoring and evaluation.

Objective 4a: Increase the use of research and evaluation to improve and focus San Francisco's TDM services and to promote the benefits of the services to key stakeholders.

Objective 4b: Improve monitoring and begin enforcement of TDM commitments in new development and institutional plans.

MISSION, PARTNERSHIPS, GOALS & OBJECTIVES

Financing

The City's current expenditures on TDM-related activities are about $2.5 million a year; and while there has been some success, in order to meet the transportation goals for San Francisco, we will need to do a lot more. Many of the actions listed in this plan are unfunded and cannot be implemented without additional resources. However, the hope is by reinstituting the TDM Partners Working Group and identifying future actions, individual agencies can set aside funding in their future work plans for these actions.

Equity

Evidence continues to accrue that affordability is a function of not only housing costs but also transportation costs. One way to support the city's affordability goals is to support low-cost and no-cost transportation options and ensure that people who live in San Francisco are positioned to be able to use them. In supporting walking, bicycling, and public transit, as well as shared-use vehicles, when needed, the TDM Plan supports lowering transportation costs. This plan recognizes that many low-income communities are in need of better information regarding transportation options. The strategy works to ensure that a lack of internet access or technology, non-English fluency and other factors do not limit residents' decisions on how to travel around the city.

Audiences

San Francisco's population and demographics are changing.

San Francisco is expected to continue experiencing population growth over the coming years, including a dynamic demographic shift. While the city's population is expected to grow by 5% by 2020 (Table 1), this population growth will be concentrated in the city's youngest residents—those under 14—and older residents – those 60 years and older (Table 2). Younger and older populations are transitioning away from a car-based lifestyle and seeking transportation (and housing) choices that cater to all ages and abilities. These demographic patterns suggest a need to focus TDM programs on children and families and aging adults, and to ensure that new residents can be supported by sustainable transportation options. It will also continue to be important to consider how the TDM program can help address economic inequality and engage San Francisco's diverse population with culturally sensitive communication.

San Francisco is a dominant employment center.

The number of employed residents in San Francisco is also expected to grow between 2015 and 2020. The 7.9% projected increase in employed residents in San Francisco (Table 3) will produce a demand

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on the transportation system that will need to be considered moving forward. The Association of Bay Area Governments projects that the city will add as many as 190,000 jobs and 100,000 households by 2040[2]. It is not only employed San Franciscans who have an impact on San Francisco's transportation system, but also those employed in San Francisco who live in the surrounding region: according to a mode share survey conducted by the SFMTA[3], work is the most likely reason for residents of adjacent counties to come into San Francisco. The city should use TDM to help employees make full use of all transportation options including local and regional transit, when designing employee and employer targeted TDM programs, policies, and services.

San Francisco is a popular tourist destination.

San Francisco's scenic beauty, outdoor activities, vibrant retail and dining cultures and exceptional museums have made the city a favorite of visitors from around the globe. In 2013, San Francisco hosted 16.9 million visitors, including hotel guests, those staying with friends and relatives, those staying in accommodations outside the city but whose primary destination was San Francisco, and regional visitors driving in for the day[4]. A 2010 survey from the San Francisco Travel Association found that visitors tend to take taxis while in the city (38%), followed by other automobile options, with 35.1% using a personal car and 15% using a rental car[5]. Just over one-quarter (28%) of tourists rode the cable cars, while under a quarter rode Muni trains and/or buses (23%) and rode the F-Line streetcars (18%). An opportunity exists for TDM to play an important role in helping visitors use sustainable modes of transportation more often.

The TDM program has identified a two-tier set of audiences for its efforts, these are prioritized in terms of importance for outreach:

> Audience Tier 1: Primary traveler audiences: residents, employees, and visitors.
>
> Audience Tier 2: Wholesaler audiences, communications aimed at those charged with passing along information to advance and promote transportation options to their constituents, noted in parenthesis: Employers (employees), property building managers (residents), and business owners (customers/visitors).

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2   Plan Bay Area: Jobs-Housing Connection Strategy (May 2012)

3   SFMTA Travel Decision Survey (2014)

4   SF Travel Visitor Industry Statistics

5   SF Travel Visitor Transportation Survey (2010) *Percentages do not add to 100% because people could indicate multiple modes of travel in their response.

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The audience is the end user of the effort. In many cases, organizations listed in Tier 2, such as business, may be a conduit to communicating to the Tier 1 audience. In this instance, the business is not an audience, they are a distribution channel. The audience is the employee of the business. Outreach, programs, and communications aimed at Tier 2 audiences will tend to be more supportive building interest in collaborations to leverage program outreach, support for policies, and other higher-level goals
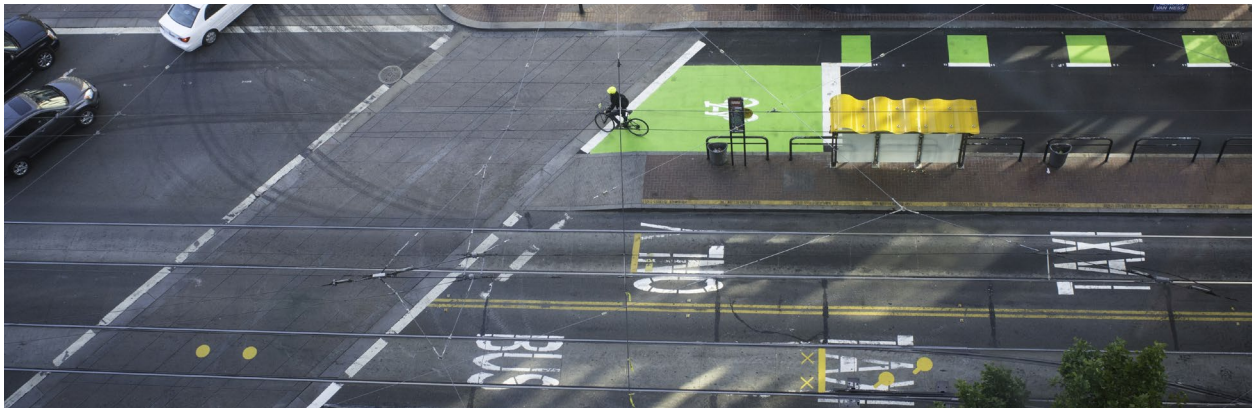
Geographies

TDM efforts are predicated on the idea that those traveling have access to infrastructure that provides them the opportunity to reach their destination by transit, bike, foot or shared rides. This TDM Plan only encourages shared rides that either support transit trips through last-mile connections or provide rides to multiple travelers in a single vehicle. Improvements and/or modifications to infrastructure are outside the scope of TDM. Nonetheless, it would not be possible to expect shifts in behavior in those areas of the city where there is not robust transit or the capacity of transit to absorb more riders, or a bike network or car sharing facilities. As such, the TDM program will continue to analyze the city's transit, bus, pedestrian, and car sharing network and focus efforts in geographies of the city using the following prioritization:

Geographic Tier 1: Locations with high rates of driving, adequate transit service with available capacity, but lower than expected transit usage; situated near the bike network; and in proximity to vehicle sharing sites.

Geographic Tier 2: either (a) Locations with high rates of driving, well serviced by transit but lacking the capacity to absorb increases in ridership; located near or moderately near the bike network and in proximity to carshare sites; OR (b) Locations with lower rates of driving, moderately serviced by transit that have the capacity to absorb increases in ridership; situated relatively close to the bike network and that have access to carshare sites.

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MONITORING & EVALUATION

Partners Working Group

A key way to build on the momentum of this report is to convene a new TDM Partners Working Group, consisting of the four identified partner agencies, on a quarterly basis. At this meeting, participants will provide updates on program and policy development activities that are ongoing, under consideration, or of interest to start. When successful, this meeting would provide a structure for TDM partner agencies to raise new ideas, and propose supportive projects.

Measuring Effectiveness

Consistent with the Interagency TDM Strategy, the effectiveness of the TDM Plan will be determined by tracking changes in single occupancy vehicle (SOV) trips. In order to reduce or maintain travel times within San Francisco's current rights-of-way, people may need to shift when they travel, where they travel, and most importantly, how they travel, and move away from single occupancy vehicles to more sustainable modes of travel such as carpooling, walking, bicycling, and mass transit.

MONITORING & EVALUATION

Additionally, program evaluation should report on changes in transportation behavior as it relates to other transportation-related metrics, including vehicle miles traveled (VMT) and greenhouse gas emissions.

The TDM program's focus on SOV to evaluate its success is based on the following:

> 1. Successful TDM efforts result in reduced SOV trips and also increases in walking, bicycling, transit use and shared rides. As there are many factors that could explain an increase in these modes, (for example, enhanced Muni service, a new bike lane, walking challenge, etc.) it would be challenging to determine the TDM program's proportional contribution to the change.

> 2. A TDM program's success is the sum of its efforts and should be evaluated as a whole. While individual programs should be evaluated, success in reducing SOV use will come as a result of the impacts of many different programs and policies combined.

Reporting on the resulting reductions in VMT and GHGs will be calculated from the trip reduction calculations. A detailed explanation of the methodology on how TDM's impact on SOV trips is available in Appendix B.

Individual TDM offerings (e.g. business outreach, bicycle education classes, etc.) will also be evaluated regularly to assess how they

are meeting their goals, which may include additional project-level goals. This will ensure that each tool is supporting the TDM Program as a whole in reaching its goals. This will also enable modifications to the program mix that will ensure that the program is capitalizing on changes to the transportation, land-use or demographic landscape.

MONITORING & EVALUATION

Defining Success

Our current infrastructure and operations simply can't sustain more growth in use without increasing the time it takes to travel through the city unless people opt to change how they get around in San Francisco. A successful TDM program will advocate for a reduction in the average travel time for people in San Francisco, helping the city in jump-starting these savings as it works on longer-term capital projects and supporting their success.

A successful TDM program will serve as a key component in creating and fostering an environment where public transportation, walking, biking and shared rides are the preferred means of travel for most trips in San Francisco. As the city continues to grow, our constrained rights of way will put limits on our ability to entirely build our way into reduced travel time. TDM, and the resulting community-wide transportation behavior change will play an important role in achieving this goal.

MONITORING & EVALUATION

San Francisco chose to prioritize public transportation and walking and bicycling through the passage of the city's Transit First policy in 1973, and continues to make decisions in support of public transit, walking, and biking when determining how to best use limited street space and public thoroughfares. San Franciscans have continued to support an integrated approach that emphasizes sustainable modes; most recently at the ballot box in 2014 and 2016, San Francisco voters reaffirmed their support for sustainable transportation modes the city's transportation planning officials.

A successful TDM program will make San Francisco a better place to live. If people can access the city without having to drive for as many of their trips, air pollution would decrease, leading to improved health and safer streets for

San Francisco residents, as well as the people who work in and visit the city. Further, TDM is a key component of the City's Climate Action Strategy in addressing carbon emissions and climate change.

A successful TDM program will make San Francisco a more affordable place. For most families, transportation is the second largest household expense, trailing only behind housing. Whether or not a household owns one or more cars is the biggest factor in transportation costs. By supporting walking, bicycling, and public transit, as well as shared-use vehicles when needed, the TDM Plan can support the significant decrease of transportation costs. The Plan recognizes that many low-income communities need better information about their transportation options. The Plan includes strategies meant to ensure that a lack of internet access or technology, non-English fluency, and other factors, such as lack of access to credit/banking, do not limit residents' ability to travel around the city.

A successful TDM program will foster an environment where public transportation, walking, biking, and shared rides are the preferred means of travel for most trips in San Francisco. As the city continues to grow and evolve, we know we will not be able to build our way out of congestion. A successful TDM program and the resulting change in how we use the transportation system would play a key role in making our transportation system work.

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IMPLEMENTATION STRATEGIES

The strategies and actions below provide guidance for funding and implementation of the San Francisco TDM program. As identified in the Interagency TDM Plan, TDM measures have the most impact when they are applied in a comprehensive approach. The strategies outlined in this document are designed such that they reinforce desired travel behavior changes through multiple channels, including policies and outreach aimed at employers, employees, residents, visitors, schools, and other audiences. The strategies are designed to be both aspirational and attainable, and call for action in both the short- and long-term. They build toward our goals; capitalize on our strengths, and; consider opportunities for citywide and intra-agency collaboration. **Actions in bold are funded and are expected to be in development or completed by the end of 2017**. It is expected that this list will be updated annually to reflect completed actions and identify new ones that are being undertaken in subsequent years.

The TDM program in San Francisco involves both overlapping jurisdictions and numerous partnerships and collaborations. This multijurisdictional work occurs within a system that does not have the funding to carry out all of the concepts that are identified as providing a TDM benefit. In order to address funding tradeoffs and clarify the roles and responsibilities for TDM strategic actions, the work plan identifies a lead agency and supporting agencies.

IMPLEMENTATION STRATEGIES

In the context of this document, a lead agency is an agency that is accountable for delivering the action. This is typically identified through regulatory language, the city's general plan or legislated ordinances. The lead agency will typically initiate and guide the development and implementation of a given specific action. Supporting agencies are those that have direct responsibility or overlapping jurisdiction for the action or who should be considered for inclusion in program development discussions (e.g., at quarterly meetings) and/or implementation tasks. At times, an agency may choose to propose an implementation activity for a task for which the agency is not listed as "lead." In doing so, the agency would work with the lead and support agencies to develop a program that is supported by the lead agency staff. In cases where this consensus is not achieved, final decisions would be made at the director level between the lead agency and the proposing partner. When multiple agencies are identified as co-leads for an action, all initiation, development, and guidance of program implementation tasks will be established by consensus among the co-lead agencies. Where this consensus is not achieved, final decisions would be made at the director level between the co-lead agencies.

Partnerships and collaborations are the norms in TDM in San Francisco, and the work plan assumes that many of the following actions will be developed collaboratively with agencies not identified as lead or support, as has been the case during the development of this document. Neither of these designations should be seen to preclude partnerships with additional city or private partners as appropriate. The designation is meant to ensure that accountability is identified early. This designation does not assign specific work programs to specific agencies.

IMPLEMENTATION STRATEGIES

Strategy 1: Develop program infrastructure for public engagement.

In order to be successful, it is imperative that the TDM program have the infrastructure that will allow it to develop effective programs, services, and policies. The following elements are integral to the creation of this infrastructure and the long-term success of the TDM program.

Key Actions:

Establish an identifiable brand for the city's TDM program.

Lead: SFMTA

Support: SF Planning, SFE, SFCTA

Develop an integrated, customer-friendly website for the TDM program.

Lead: SFMTA

Support: SF Planning, SFE, SFCTA

Develop and implement standard operating marketing and outreach procedures that ensure customers have a seamless experience regardless of the agency primarily responsible for the effort.

Lead: SFMTA

Support: SFE, SFCTA

Ensure adequate staffing for TDM Program priorities.

Lead: All Agencies

Support: --

Identify funding and develop an internal budget in operating and capital programs to fund the annual work program identified by the TDM Partners Working Group.

Lead: SF Planning, SFCTA, SFMTA

Support: SFE

Coordinate TDM offerings with each other to deliver a comprehensive program and capitalize on areas of potential mutual impact or effort.

Lead: SFMTA

Support: SF Planning, SFE, SFCTA, others

Alongside the key actions listed here, the Partners Working Group commits to conducting comprehensive community outreach and engagement wherein community stakeholders are engaged in all TDM programs and projects in a proactive and meaningful way. Appendix E is provided as one example of the many approaches to community engagement in San Francisco.
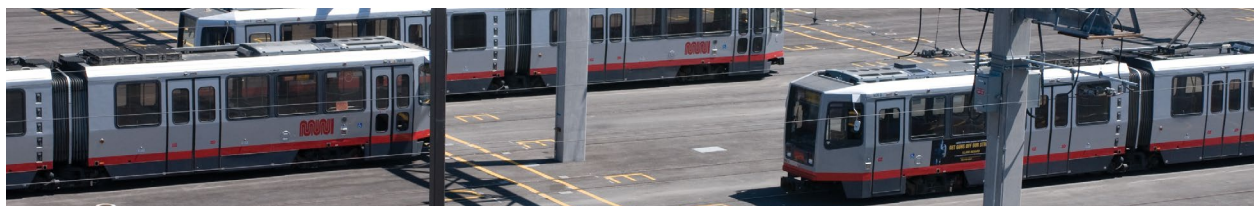
IMPLEMENTATION STRATEGIES

Strategy 2: Propose and advocate for strong policies that reduce SOV trips into, through and within San Francisco.

Best-practices suggest that San Francisco's TDM program should rely on a solid policy framework that sets the boundaries for how city transportation supply should be used. The following are policies that have been shown to be effective and should be pursued for development and adoption, as appropriate.

Key Actions:

Use pricing to facilitate and support the use of sustainable modes of transportation:

> **Continue to implement and update parking management and pricing policy.**
>> *Lead: SFMTA*
>> *Support: --*

> **Pursue a comprehensive mobility management program (congestion pricing, parking management, and transit affordability pass development) on Treasure Island.**
>> Lead: SFCTA
>> Support: SFMTA

Investigate and pilot pricing or incentive-based approaches to managing congestion in the downtown core and on regional transportation infrastructure.
> *Lead: SFCTA (regional), SFMTA (local)*
> *Support: SFCTA (local)/SFMTA (Regional)*

Investigate voluntary and mandatory vehicle trip-caps for high vehicle trip generation areas.
> *Lead: TBD*
> *Support: --*

Ensure that new developments limit their impacts on San Francisco's transportation system through VMT reduction targets and TDM measures.
> *Lead: SF Planning*
> *Support: SFMTA, SFCTA*

Develop policy positions to support regional and state legislative advocacy for better-managed highway capacity focused on further encouraging carpooling.
> *Lead: SFMTA, SFCTA*
> *Support: SFE*

Develop and refine car-share supportive policies.
> *Lead: SFMTA*
> *Support: SF Planning, SFCTA*

IMPLEMENTATION STRATEGIES

Develop and refine curb-use and parking policies to manage commuter shuttle, tour bus, and other non-SOV private vehicle systems.

> *Lead: SFMTA*
> *Support: SFCTA*

Integrate TDM strategies into relevant city planning and policy processes, such as complete streets policy and local zoning ordinances.

> *Lead: Agency responsible for policy*
> *Support: SF Planning, SFCTA, SFMTA, SFE*

Develop policies that support HOV use and integrate and support regional and local HOV networks on San Francisco's streets.

> *Lead: SFMTA*
> *Support: SFCTA*
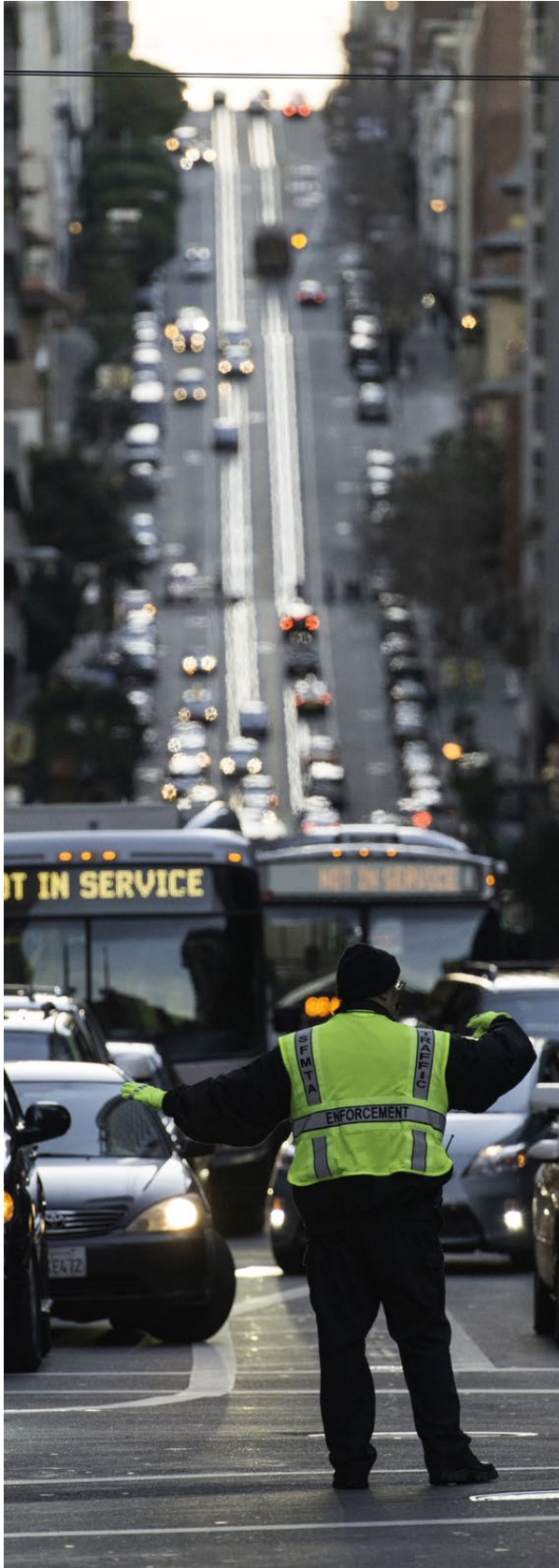
Identify effective ways to encourage transit riders to travel outside the peak period when passenger capacity is less of an issue.

> *Lead: SFCTA (regional)/SFMTA (Local);*
> *Support: SFE*

Develop a citywide policy to mandate TDM as primary transportation offering to city employees for getting to and from work.

> *Lead: SFE, SFMTA*
> *Support: --*

IMPLEMENTATION STRATEGIES

Strategy 3: Advocate for and support programs, tools, and services that enhance and improve coordination of regional transportation.

San Francisco's transit system is inextricably linked to those of the other transportation providers throughout the region of which there are more than two dozen. For the San Francisco TDM program to be successful, this regional context must be considered. Currently, there are 4 million daily trips to, from and within San Francisco. This is expected to increase to 4.2 million by 2018[6]. Significant regional growth from the east and south puts increasing pressure on downtown station areas and local and regional connecting services.

By thoughtfully locating opportunities for regional transit integration and eschewing the current system of divergent maps, schedules, and fares, the TDM program could help make transit trips throughout the region a more efficient and usable experience—an end that is directly in line the San Francisco's TDM program goals.

---

6   SF CHAMP (2010); US Census Population
         Estimates

IMPLEMENTATION STRATEGIES

Key Actions:

Support efforts for integrated and regional fare/ pass development to maximize region-wide transit ridership and promote equity (e.g., MTC means-based fare policy, Gatorpass, lifeline program, etc.).

> *Lead: SFCTA, SFMTA*
> *Support: --*

Coordinate the development of an implementation plan for the recommendations of the Late Night Transportation Study (e.g., service proposals, Lifeline pass program changes, security, and marketing strategies, etc.).

> *Lead: SFCTA*
> *Support: SFMTA, OEWD, SFE, Regional partners*

Incorporate regional transit providers in marketing and promotion materials.

> *Lead: SFMTA*
> *Support: SFE*

Coordinate with regional agencies involved in provision regional rideshare, local and regional commuter benefits ordinance implementation and emergency ride home.

> *Lead: SFE, SFCTA*
> *Support: --*

Strategy 4: Monitor, evaluate and enforce conditions of development project approval.

Monitoring and enforcing existing conditions of development project approval is an important TDM activity. Historically, the city has not proactively monitored or enforced these conditions on an ongoing basis with regard to TDM commitments, due to limited staff resources. Monitoring and enforcing existing developer TDM conditions is critical to limiting the transportation impact of developments and to ensure that residents, tenants, and

IMPLEMENTATION STRATEGIES

employees have access to the TDM measures that were outlined in project conditions. Future work will focus on agencies partnering together to standardized efforts to monitor for compliance.

Key Actions:

Establish standardized monitoring and reporting practices and tools for existing and future development projects, including database tracking.

> *Lead: SF Planning*
>
> *Support: SFCTA, SFMTA*

Monitor and Enforce TDM-related developer conditions.

> *Lead: SF Planning*
>
> *Support: SFMTA*

Establish and implement evaluation programs to identify the efficacy of TDM measures associated with land use development.

> *Lead: SF Planning/SFCTA*
>
> *Support: SFMTA*

Continue and enhance the TDM team's role in advising new development to ensure that developers are made aware of and consider best practices in TDM.

> *Lead: SF Planning*
>
> *Support: SFCTA, SFMTA, SFE*

Strategy 5: Develop materials that provide information about services, products, and programs.

Outreach and education materials are an effective way to deliver information about TDM programs and services. User-oriented outreach approaches, including community-based social marketing and human- centered design – a community outreach and communication methodology that works with communities to develop campaign messages that target the interests and needs of intended audience, and can successfully address barriers to transportation – ensure that outreach and materials effective in changing behavior.
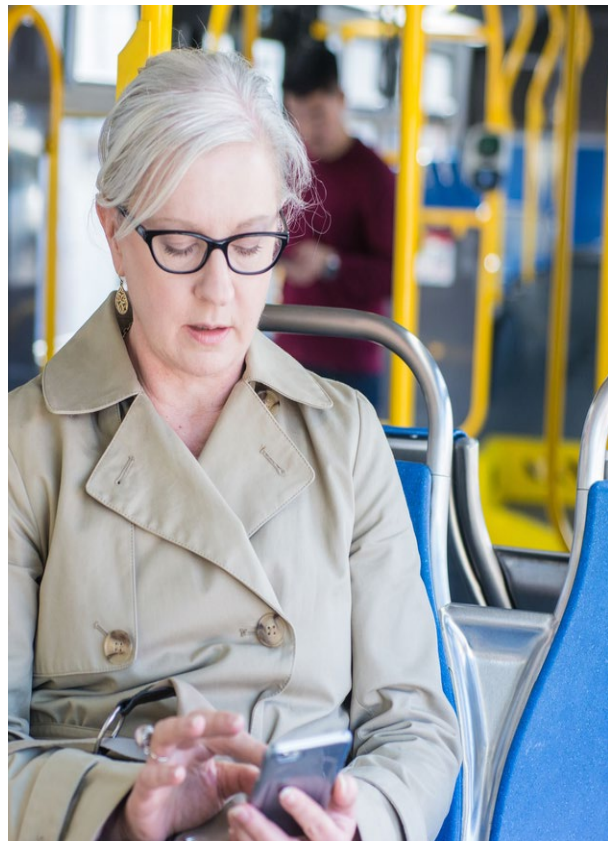
IMPLEMENTATION STRATEGIES

Key Actions:

Create outreach and marketing materials that will ensure that target audiences are fully informed of their transportation options beyond driving alone.

> *Lead: SFMTA*
> *Support: SFE*

Design, update and provide information to promote new transit and bicycling routes and support service changes.

> *Lead: SFMTA*
> *Support: SFE*

Ensure message compatibility and consistency with marketing and communications efforts by providing ongoing input.

> *Lead: SFMTA*
> *Support: SF Planning, SFCTA, SFE*

Design pedestrian wayfinding standards and implementation plan.

> *Lead: SFMTA*
> *Support: --*

Implement the bicycle wayfinding pilot and expand based on the results.

> *Lead: SFMTA*
> *Support: --*

Develop an outreach team that will engage with workplaces, multifamily residential buildings, hotels, schools, hospitals and other entities to implement programs that provide in-person transportation assistance.

> *Lead: SFE, SFMTA*
> *Support: --*

Strategy 6: Develop visitor-oriented and event-related TDM services to facilitate and encourage visitors' understanding and use of sustainable options when in San Francisco.

San Francisco is a major visitor destination. A series of programs and services tailored to the needs of visitors can help ensure that tourists utilize sustainable modes of transportation when traveling to, from, and within San Francisco.

IMPLEMENTATION STRATEGIES

Key Actions:

Coordinate with SF Travel, Hotel Council, Concierge Council, Cruise Operators and major conferences to ensure that visitors to San Francisco are aware of all non-SOV options.

Lead: SFMTA

Support: SFE

Market Muni's special fare to encourage tourists to ride transit when in San Francisco.

Lead: SFMTA

Support: SFE

Provide hotels with the information and materials that staff members need to inform and assist guests about local transportation options.

Lead: SFMTA

Support: SFE

Continue existing efforts to manage demand associated with major events or venues/tourist sites.

Lead: SFMTA

Support: --

Complete study of tourist-related congestion on the Lombard crooked street and recommend next steps.

Lead: SFCTA

Support: SFMTA

Strategy 7: Develop programs for employer and residential communities to ensure residents/employees are fully aware of their transportation options.

A comprehensive TDM program for employees should provide information on local and regional transportation options along with incentives to try/use them. A successful program will be unified and provide low-cost programs such as rideshare matching, emergency ride home, and education about pre-tax benefits; the program should also connect employees with bicycling, car sharing, bike sharing, and transit options. Residential programs should focus on neighborhoods with high rates of driving and adequate transit service with available capacity, but lower than expected transit usage. Many of these efforts will be carried out in partnership with SF Environment and the SFCTA.

IMPLEMENTATION STRATEGIES

Key Actions:

Implement neighborhood-specific TDM programs that help residents know and understand how to navigate the travel options available in their community.

>*Lead: SFMTA*
>*Support: SFE*

Develop and implement an employer outreach program that connects employers with programs and services that enable them to support their employees in reducing SOV trips:

>**Provide a standardized and focused survey for employers to administer to help understand their employees' commuting patterns and needs.**
>>*Lead: SFMTA*
>>*Support: SFE*

>**Exclusively for participating companies and office locations, create customized programs, including marketing materials including commute planners, brochures, posters, and resource guides.**
>>*Lead: SFE/SFMTA*
>>*Support: --*

>**Provide outreach and information to companies and their employees about commuting options and benefit information.**
>>*Lead: SFMTA*
>>*Support: SFE, SFCTA*

Help companies evaluate options for bikeshare corporate membership and station sponsorship.

>*Lead: SFMTA*
>*Support: --*

Help companies gain national recognition as Bike Friendly Businesses.

>*Lead: SFMTA*
>*Support: SFE*

Better integrate existing TMA's in San Francisco into supporting the city's TDM efforts.

>*Lead: SFMTA*
>*Support: SFCTA, SFE*

Develop and implement a pilot program to provide outreach to new and relocating businesses.

>*Lead: SFMTA*
>*Support: SFE*

Develop a fuller understanding of how TMAs might be created in existing neighborhoods and developing areas, and look for opportunities to support and encourage the creation of new TMAs within San Francisco.

>*Lead: TBD*
>*Support: --*

Promote the Emergency Ride Home program.

>*Lead: SFE*
>*Support: SFMTA*

IMPLEMENTATION STRATEGIES

Review the Commuter Benefits Ordinance and consider amendments.
> *Lead: SFE*
> *Support: SFCTA, SFMTA*

Annually convene TDM practitioners from the San Francisco public and private sector, including universities and educational institutions, as well as regional partners to share best practices, TDM updates, recognize organizations demonstrating Excellence in TDM, and build stronger partnerships.
> *Lead: SFCTA*
> *Support: SFMTA, SFE, SF Planning*

Strategy 8: Strengthen partnership with schools to enhance school and family-focused programming.

Travel to school, including colleges and universities, is a large source of trips in San Francisco. Although many of these trips are made by car there are increases in traveling to school by biking, foot, and public transit. Efforts to extend education and encouragement for walking, biking, taking transit, and sharing rides to San Francisco's school populations is an effective way to increase trips made by these modes and to ensure that these trips are positive experiences for students.

Call for robust TDM plans as part of Institutional Master Plans.
> *Lead: SF Planning*
> *Support: SFMTA, SFCTA*

Key Actions:
Develop a TDM guidebook/toolkit to help universities and other institutions coordinate transportation, housing, and land use.
> *Lead: SFMTA*
> *Support: SFCTA, SFE, Planning*

Work with K-12 schools to promote and to coordinate TDM requirements and transportation options for schools.
> *Lead: SFMTA*
> *Support: SFDPH, SFE, SFUSD*

Support crossing guards in areas where trips could be made on foot in addition to those areas where walking to school are already more established.
> *Lead: SFMTA*
> *Support: SFDPH, SFUSD*

Provide survey tool for universities to administer to better understand travel behaviors of faculty, staff, and students.
> *Lead: SFMTA*
> *Support: SFCTA*

Convene TDM leads from across educational institutions to share best practices.
> *Lead: SFMTA*
> *Support: SFCTA*

Identify family transportation needs and potential programs to address them.
> *Lead: SFMTA*
> *Support: SFCTA*

IMPLEMENTATION STRATEGIES

Finalize school transportation survey and identify next steps.

> *Lead: SFCTA*
>
> *Support: SFCTA, SFDPH, SFMTA, SFE*

Implement a Safe Routes to School program for San Francisco public schools.

> *Lead: SFDPH*
>
> *Support: SFMTA, SFE*

Strategy 9: Incubate innovative policies and programs and explore their feasibility to further TDM goals.

The TDM program should be approached as a place to incubate new and unique ideas that could contribute to a reduction in SOV use and that could help build positive habits around sustainable transportation.

Key Actions:

Develop a policy framework for incubation to assess new programs to pilot.

> *Lead: SFMTA, SFCTA*
>
> *Support: SFE*

Pursue bulk pass programs and other fare offerings that will encourage transit use.

> *Lead: SFMTA*
>
> *Support: --*

Identify and integrate technology that provides useful information about transit and other modes into TDM efforts.

> *Lead: SFMTA*
>
> *Support: SFCTA, SFE*

Make data about bicycle routes, transit routes and operations, and parking and taxis publicly available, so third parties can use the data to produce useful tools and applications.

> *Lead: SFMTA*
>
> *Support: SFCTA*

Work to reduce the number of delivery vehicles that use the city during peak hours and impact congestion.

> *Lead: SFMTA*
>
> *Support: SFCTA*

Study the use of HOV lanes on local streets and roads and regional tolling[7].

> *Lead: SFCTA (regional)/SFMTA (local)*
>
> *Support: SFCTA (Local)/SFMTA (regional)*

Work with the Faith community to develop supportive TDM programs to support better multimodal access to worship.

> *Lead: SFMTA*
>
> *Support: SFE*

Develop a permanent on-street permit program for shared vehicles and provide off-street parking to carshare vehicles in SFMTA garages.

> *Lead: SFMTA*
>
> *Support: --*

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7   This work will be completed as part of the "Freeway and Street Traffic Management Strategy" of the LRTPP and through the Freeway Corridor Management Study

IMPLEMENTATION STRATEGIES

Strategy 10: Facilitate transportation equity through targeted provision of education and encouragement for minority, low-income, disabled, and senior populations to take transit, walk, bike, use rideshare or carshare.
A goal of the TDM program is for everyone in the city to be able to find it easy to access a range of high-quality transportation choices. A lack of reliable and efficient transportation is often a huge barrier for many low-income people trying to access fundamental needs; furthermore, transportation has emerged as crucial to escaping poverty and overcoming many of its associated health impacts.

Programs that promote walking and biking can have significant health benefits. To ensure that San Francisco residents, employees, and visitors who have limited English proficiency, are minorities, low-income, and/or seniors are aware of and educated about San Francisco's transit options, extra and concerted efforts need to be put forth to reach these populations, using culturally inclusive techniques.

Key Actions:
Promote pass-based programs that provide discounted Muni fares to low- and moderate-income residents, seniors, people with disability, and youth under 18.
Lead: SFMTA
Support: SFE

Create a plan for gaining an understanding of the unique transportation needs and ways to serve a variety of socioeconomic and demographic groups in San Francisco, including those traveling to/from the city.
Lead: SFMTA (local), SFCTA (regional)
Support: SFCTA/SFE/SF Planning (local)

Investigate the feasibility of providing free bikeshare memberships to qualifying clients of San Francisco social service agencies.
Lead: SFMTA
Support: --

Provide ongoing outreach, education, and encouragement for all forms of transit, to target populations to reduce the cost of and facilitate the use of transit and bikeshare.
Lead: SFMTA
Support: SFE

Support the creation of transit etiquette materials that focus on providing safe transit experience for passenger overall with an emphasis on seniors and people with disabilities.
Lead: SFMTA
Support: --

Support data collection and analysis on paratransit trips to ensure that services provided are optimal for San Francisco's senior and disabled populations.
Lead: SFMTA
Support: --

IMPLEMENTATION STRATEGIES

Integrate the provision of information about the transportation choices available to residents of low-income developments into their site management practices.

> *Lead: SFMTA*
> *Support: SF Planning*

Investigate ways to ensure that vehicle sharing programs are financially accessible to people in all income brackets and regardless of primary language spoken.

> *Lead: SFE, SFMTA*
> *Support: --*

Support implementation of a pilot shuttle program to provide transportation services to Bayview Residents.

> *Lead: SFCTA*
> *Support: SFE, SFDPH*

Strategy 11: Create/Formalize active transportation (walking and bicycling) encouragement programs.

San Francisco residents, employees, and visitors are eager to include biking and walking as part of their transportation options. Safety has been identified as a key barrier to the expansion of non-motorized mode share. Bicycling and walking can be most directly encouraged through coordinated safety infrastructure investment, education, and enforcement. Promoting and facilitating safe biking and walking is key to ensuring a growth in these modes and is critical to helping San Francisco meet its TDM goals. Additionally,

many Muni lines have exceeded their capacity at certain times of the day. The TDM program should, in concert with the SFMTA's transit division, consider ways to shift riders to bicycling and walking in order to free up space on Muni and provide space for additional commuters to shift from driving to transit.

Key Actions:

Support and promote Vision Zero pedestrian and bicycle safety promotion efforts.

> *Lead: SFMTA*
> *Support: SFCTA, SFE*

Develop comprehensive, long-term programs that encourage people to bicycle and walk more.

> *Lead: SFMTA*
> *Support: SFE*

Support the expansion of bicycle sharing and bike parking; provide recommendations and input on outreach materials and the strategic direction of the programs.

> *Lead: SFMTA (public right-of-way)/SF Planning (new development)*
> *Support: SFE*

Provide and measure the impact of bike amenities, such as Bike Fixit Stations and permanent air pumps, throughout the city, concentrating on transit hubs, secondary schools, and retail business.

> *Lead: SFMTA*
> *Support: SF Planning*

IMPLEMENTATION STRATEGIES

Coordinate outreach and education around bicycle and pedestrian network upgrades.

> *Lead: SFMTA*
>
> *Support: SFE*

Strategically market transit service and the bicycle network to provide riders with multiple options on the overall system.

> *Lead: SFMTA*
>
> *Support: SFE*

Strategy 12: Research and evaluate TDM strategies to develop a stronger, more effective program.

If the TDM program is to develop services, programs, and policies that meet the needs of residents, visitors, and employees, it must continually be aware of the landscape in which it operates. To do so the program should conduct regular research that will provide insight into the transportation needs and habits of these groups and also clarifies the impact of TDM policies on travel behaviors.

IMPLEMENTATION STRATEGIES

Key Actions:

Regularly evaluate the TDM program's effectiveness and recommend adjustments to the program based on the results in order to ensure increased effectiveness over time.

> *Lead: SFMTA, SFCTA*
>
> *Support: SF Planning, SFE*

Evaluate the effectiveness of individual TDM programs.

> *Lead: SFCTA, SFMTA*
>
> *Support: SFE*

Conduct research on how people use the transportation system in San Francisco, their satisfaction with local and regional transportation options, and best practices in the development and implementation of TDM programs.

> *Lead: SFCTA (regional), SFMTA (local)*
>
> *Support: SFCTA (local), SFMTA (regional), SFE*

Create survey and data tools to identify baseline information about the needs and attitudes of San Francisco's transportation users.

> *Lead: SFMTA*
>
> *Support: SFCTA, SFE*

Quantify the return on investment of transit and TDM programs in terms of public health.

> *Lead: SFMTA*
>
> *Support: SFDPH*

Develop bi-annual congestion management program to report on of TDM and other measures in reducing congestion and vehicle miles of travel.

> *Lead: SFCTA*
>
> *Support: --*

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APPENDIX A: DEMOGRAPHIC DATA

Table 1: Population Projections, San Francisco, 2015-2020

	2015 (projected)	2020 (projected)
Total Population	848,564	891,493
Population Change	-	42,929
Population Change (%)	-	5%

Source: State of California, Department of Finance, "Report P-1 (Age): State and County Population Projections by Major Age Group, 2010-2060 Sacramento, California, December 2014."

Table 2: Projections by Age Group, San Francisco, 2015-2020

Age Group	2015 (projected)	2020 (projected)	Change (%)
0 - 14	105,539	120,349	14%
15 - 24	72,518	69,788	-4%
25 - 44	318,205	312,676	-2%
45 - 59	170,743	183,975	8%
60 +	181,559	204,705	13%

Source: State of California, Department of Finance, "Report P-1 (Age): State and County Population Projections by Major Age Group, 2010-2060 Sacramento, California, December 2014."

Table 3: Employed Resident Projections, San Francisco, 2015-2020

	2015 (projected)	2020 (projected)
Employed Residents	426,770	460,322
Change	12,904	35,552
Change (%)	3.1%	7.9%

Source: Association of Bay Area Governments (ABAG), Projections 2009

APPENDIX B: MEASURING SUCCESS

TDM PROGRAM METRIC: Average weekday SOV vehicle trips and miles reduced in San Francisco by TDM programs.

TO IDENTIFY TDM PROGRAM IMPACT ON REDUCING SOV TRIPS:

STEP 1: Identify the population base for each program (number of people included in the coverage) (Total #)

- Commute by Bike Classes
- Neighborhood TDM
- Employer TDM program

STEP 2: Identify the number of new placements (commuters or other travelers who were influenced or assisted by a TDM program to start or increase use of non-SOV modes) (%)

- This data is based on program effectiveness surveys, or national research if necessary

STEP 3: Calculate the total number of vehicle trips reduced using a Vehicle Trip Reduction (VTR) factor (#1*#2*VTR)

- This data is based on program effectiveness surveys, or national research if necessary

APPENDIX C: PERFORMANCE MEASURES

GOAL 1: Make it easy for residents, employees, and visitors to travel by transit, foot, bike, rideshare or carshare when traveling to, from, and within San Francisco.

OBJECTIVES

- Provide high-quality TDM programs and services to San Francisco residents, employees, businesses, and visitors.
- Ensure that TDM information and services are presented in a culturally sensitive manner and are accessible to and can be obtained by people of all incomes, abilities, and ages.
- Develop innovative TDM policies, programs and services.

PERFORMANCE INDICATORS

Awareness, recognition of, satisfaction with TDM programs and services by employees, employers, residents, developers, and visitors.

Use of TDM services and programs by employees, residents, and visitors	
Emergency Ride Home (registered employers)	400
511 rideshare	
SF pre-tax commuter benefits enrollment (2014)	
City employees	5,166
Non-city employees	90,000
Employers participating in employee commuter benefit programs (2014)	
City departments	52
Businesses	1,851
Enrollment in membership and pass-based programs	
Bay Area Bikeshare: Rides per bike/ day (2014)	848,564
Carshare (2015)	-
Membership	96,568
On-Street Spots	123
Off-Street Spots	1,629
Free muni for youth (2015)	22,000
Free muni for seniors (2015)	40,000
Free muni for people with disabilities (2015)	10,000
Muni Lifeline (2015)	-
Identification Cards Issued	50,000
Average passes purchased per month	19,000
Class Pass	-
Bulk Transit Pass (program not established)	-
Mode share at businesses and residences offering TDM services	-

*where no data is shown, baseline data was unavailable. Staff will continue to work to identify or develop tools to collect and report this data.

APPENDIX C: PERFORMANCE MEASURES

GOAL 2: Institutionalize a culture that embraces walking, bicycling, taking transit and ridesharing.

OBJECTIVES

- Increase awareness and support of, and comfort with, the use of non-SOV transportation options by residents, employees, employers, and visitors.
- Increase awareness and support of the benefits provided through TDM by government agencies, elected officials and community leaders.
- Remove barriers to the use of sustainable transportation options.

PERFORMANCE INDICATORS

Automobiles per capita (2013)	0.47
Bicycle mode share (2014)	4%
Drive alone commute mode share for residents, employees & visitors (2014)	
Private auto-trips	48% / 1,900,000
Non-city employees	1,823,840
Sustainable use mode share for residents, employees & visitors (2014)	
Active and shared modes	52% / 2,100,000
Carpool (within San Francisco)	16%
Muni ridership (average weekday boarding; 2014)	704,000
Paratransit ridership (total annual trips, 2013)	771,175
Permanent TDM funding (millions)	1.1
Number of new and continuing transportation options awareness events	
Perception of transportation system and services (Muni satisfaction; 2014)	64%
Walking mode share (2014)	23%
Vehicle Miles Traveled (million miles; 2012)	9.4

*where no data is shown, baseline data was unavailable. Staff will continue to work to identify or develop tools to collect and report this data.

GOAL 3: Collaborate on a wide variety of initiatives to leverage the impact of TDM.

OBJECTIVES

- Work with city and private partners to incorporate TDM into all programs and projects across San Francisco as appropriate.
- Promote the understanding of the economic, environmental, social and health benefits of TDM.
- Maximize the use of sustainable transportation options for trips generated by new development.
- Collaborate with regional partners.

APPENDIX C: PERFORMANCE MEASURES

PERFORMANCE INDICATORS

GHG emissions (% of carbon footprint) (2013 Climate action strategy)	43%
Percent of new development/redevelopment with TDM conditions	
Mode use at new developments	
Number of employers working with TDM programs	

GOAL 4: Ensure and prioritize effective programs through monitoring and evaluation.

OBJECTIVES

- Increase the use of research and evaluation to improve upon San Francisco's TDM services and to promote the benefits of the services to key stakeholders.

- Improve monitoring and begin enforcement of TDM commitments in new developments/ institutional plans.

PERFORMANCE INDICATORS

Completion of monitoring and evaluation program as outlined in each program and policy
Rate of compliance for existing and new developments meeting their TDM commitments

TDM Program Performance Measures

Each goal and objective is supported by a series of performance measures and their related indicators. The measures and indicators are the means through which the TDM program will monitor its status in meeting each objective.

Goal 1: Make it easy for residents, employees, and visitors to travel by transit, foot, bike, rideshare or carshare when traveling to, from, and within San Francisco.

- Increase the use of research and evaluation to improve upon San Francisco's TDM services and to promote the benefits of the services to key stakeholders.

- Improve monitoring and begin enforcement of TDM commitments in new developments/ institutional plans.

APPENDIX C: PERFORMANCE MEASURES

Goal 2: Institutionalize a culture that embraces walking, bicycling, taking transit and ridesharing.

- Automobiles per capita
- Bicycle and walking mode share
- Drive alone and sustainable commute mode share for San Francisco residents, employees and visitors
- Muni and paratransit ridership
- Number of new and continuing transportation options awareness events
- Permanent TDM funding (citywide)
- Perception of transportation system and services
- Vehicle miles traveled

Goal 3: Collaborate on a wide variety of initiatives to leverage the impact of TDM.

- Greenhouse gas emissions
- Employers offering TDM services
- Mode use at new developments
- Percent of new development/redevelopment with TDM conditions
- Health impacts of TDM programs and services

Goal 4: Ensure and prioritize effective programs through monitoring and evaluation.

- Completion of monitoring and evaluation program as outlined in each program and policy
- Rate of compliance for developments (existing and new) meeting their TDM commitments

APPENDIX D: PARTNERS ROLES

City staff that works on TDM related efforts has developed a framework for working together that identifies the current areas where the agencies that have historically worked on aspects of TDM have responsibility or accountability for the outcomes of TDM efforts.

The TDM program shall leverage strengths of other city and regional agencies and private or non-profit entities. There are already solid partnership projects that exemplify how the city, county, and private-sector work together to provide high-quality TDM offerings.

San Francisco Municipal Transportation Agency (SFMTA)
Many of SFMTA's core services are strongly connected to TDM. The SFMTA oversees San Francisco's roadway network, operates Muni transit services and manages the city's taxi and accessible transportation programs. Additionally, the agency is charged with managing the city's public parking supply. As the SFMTA is the primary agency who is accountable for the management of the city's streets and transit, it is charged with managing a large portion of the city's TDM program, coordinating and working with city partners to ensure that this strategy meets the needs of the various departments and agencies, while meeting the transportation goals of the city as defined in the SFMTA's Strategic Plan.

San Francisco County Transportation Authority (SFCTA)
The SFCTA plays an important role in TDM policy development, planning, and funding for San Francisco and within the Bay Area region. It also is delivering an innovative comprehensive mobility management program to support development plans on Treasure Island. SFCTA is the county Congestion Management Agency and designated Treasure Island Mobility Management Agency. As the County Transportation Authority, the SFCTA plays an important role in coordinating regional transportation and transportation policy, as well as the development of the San Francisco Transportation Plan (SFTP) which identifies San Francisco's priorities for the regional transportation plan (Plan Bay Area). As the Congestion Management Agency, the SFCTA updates the bi-annual Congestion Management Program (CMP) for the county which reports on progress toward TDM goals and ongoing work program priorities. The SFCTA funds many TDM activities led by other local and regional agencies, from the local-voter, approved Prop K and AA programs, as well as the Air District, Lifeline, and Regional "One Bay Area" Transportation Grant Program (OBAG). Finally, the SFCTA maintains a comprehensive travel demand model and database and regularly conducts research and evaluation on TDM policies and projects.

APPENDIX D: PARTNERS ROLES

**San Francisco Department of the Environment (SF Environment)**

The San Francisco Commuter Benefits Ordinance (CBO) identifies SF Environment as the manager of the CBO program. The department is also the delegated county manager for rideshare activities in San Francisco and operates the Emergency Ride Home program. SF Environment is responsible for the implementation and outcomes of these programs. Additionally, as there are major impacts from transportation on greenhouse gas emissions and pollution, SF Environment's responsibility for the city's climate plan ensures that it is an important voice in reducing global warming impacts from transportation through the TDM program.

San Francisco Planning Department (SF Planning)

SF Planning interacts with TDM primarily through development review and changes to the planning code, which affects new development and changes of use. The planning code includes a variety of TDM requirements. SF Planning also employs TDM measures as mitigations within environmental review process and is the lead agency in the adopted TDM Ordinance, which provides a cohesive approach to reducing VMT through the application of TDM measures to new development in San Francisco.

APPENDIX E: PUBLIC OUTREACH & ENGAGEMENT

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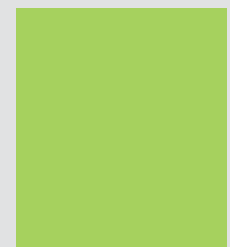
Public Outreach Notifcation Standards

Public Outreach & Engagement Team Strategy
(POETS)

A Guide to Conducting Community Outreach for SFMTA Projects

JULY 2016 -*An update to these standards is expected in Fall 2017*

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INTRODUCTION TO PUBLIC OUTREACH AND ENGAGEMENT PROCESS

The SFMTA plans, builds and operates a wide variety of projects as part of managing the City's transportation system. Projects range from smaller projects with low community impacts to very large, multi-year projects that have the potential to impact thousands. The size and scope of a project can determine the level of public involvement required.

Simply defined, public outreach is the effort of conducting awareness activities through targeted community interactions. Public outreach activities are those efforts that can directly impact the opinions of the public as it relates to the completion of SFMTA projects.

Public Outreach and Engagement Team Strategy (POETS) initiative is the Agency's response to declaring a meaningful commitment to public outreach and engagement on all SFMTA projects that affect our customers and the community in which we serve.

The Agency goals for public outreach and engagement are the following:

– Build trust and relationships by better managing public and stakeholder expectations
– Create a consistent model for public outreach and engagement that can be leveraged across all divisions
– Identify and delivery useful tools and resources to support public outreach and engagement

Community outreach and engagement activities will become an integral element of planning for any SFMTA project. As such, the PM/PL will be expected to develop and implement a communications and outreach plan that is right for the project size and duration, supports the Agency goals and ensures outreach is synchronized with key project milestones. Every project, regardless of the level of impact on customers and community, will feature a relevant communications plan.

The POETS mission is to enable the PM/PL to develop and implement an effective communications and outreach plan by providing the necessary guidance, tools and resources.

The POETS mission will be accomplished by:

1. Defining public outreach standards
2. Delivering assessment and planning templates
3. Ensuring quality with relevant training, recognition and supporting resources

PUBLIC OUTREACH & ENGAGEMENT STANDARDS

A standard level of community outreach will provide the public with the assurance that they will be presented with comprehensive, well-communicated information; ensure concerns are heard and considered to the extent possible; and that their feedback will be reflected directly in the projects when appropriate.

Required standards for outreach and engagement will ensure the appropriate level of resources are identified up front before projects are derailed by poor outreach efforts. The following strategies will be required for every SFMTA project.

- Provide briefings to stakeholders as appropriate to the project
- Distribute regular audience notifications and updates using the most effective tactics,
- Hold public meetings appropriate for scope and complexity of the project

PUBLIC
OUTREACH
STANDARDS

STAKEHOLDER
BRIEFINGS

MULTICHANNEL
UPDATES

PUBLIC
MEETINGS
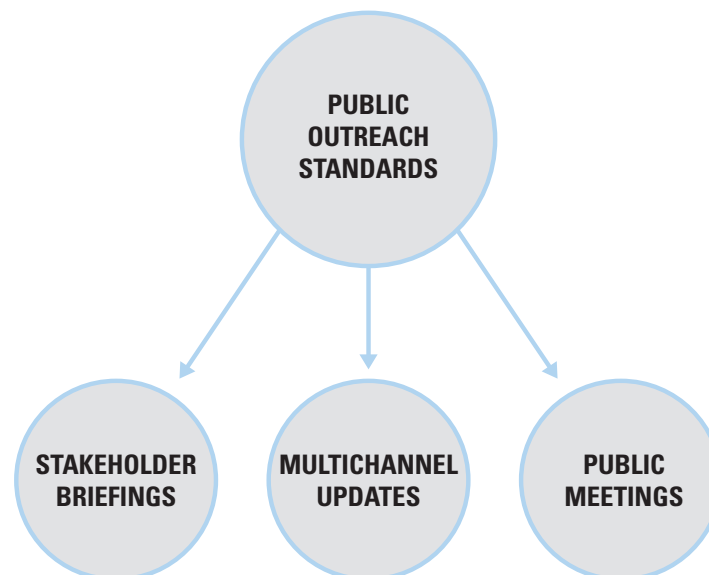
STAKEHOLDER BRIEFINGS

The SFMTA POETS program ensures that key stakeholders are engaged in a dialogue to gather input, and improve decision-making and accountability for all projects the SFMTA undertakes.

Stakeholder briefings are the process by which a PM/PL involves key stakeholders who may be affected by or influence a project. This process allows the gathering of feedback and input and is an important step in engaging key audiences in a dialogue about a project. Various audiences could be obstacles in the forward movement of a project, and this process will assist in mitigating some of the difficulties, as well as identifying key pain points that need to be addressed.

Briefings should also be used to obtain feedback and confirm that the project team is engaging with the appropriate stakeholders. Involving stakeholders in the decision-making processes is a tool utilized to increase project understanding, assist in moving a project toward completion, and develop lasting relationships throughout the community for SFMTA.

Stakeholder briefings can include communicating with various audiences, such as members of the Board of Supervisors whose districts will be impacted by the project.

- Stakeholder briefings should include the following:
- Summary of the project goals and objectives
- Benefits of the project to stakeholder
- Activities and impacts occurring as part of the project
- Project planning and implementation timeline

It is important to consider the full range of potential stakeholders who could be affected by the project. This means looking beyond the minimum legally required distance for project notifications and outreach. As a general rule, it is strongly advisable to expand rather than limit the scope of project outreach and updates, and to consider non-geographically defined communities that might also have an interest in the project.

MULTICHANNEL UPDATES

A variety of tactics can be utilized to regularly inform stakeholders and the public using an assortment of communication channels. Varying audiences can require varying types of communication tactics, including providing outreach materials in languages other than English. As a public agency that receives federal funding, SFMTA is required to comply with both federal and local language assistance requirements, depending on the type of project and the needs of the involved community. During the audience analysis, the PM/PL will identify the best way to communicate with key stakeholders, thereby determining which communications tactics are needed to engage audiences about a project.

Notifications can take a variety of forms, such as direct mailings, email updates, SFMTA alerts, partner lists, advertising, newsletters and earned media. Multiple channels can and should be used to extend the reach of project communications in an effort to keep all key stakeholders informed. Recall the advice above that notification, outreach and updates should extend beyond the minimum required distance to reach those who will actually be affected by and/or interested in the project. When applicable, a project should include a project web page on sfmta.com, project fact sheets and FAQs. As a general rule, all project collateral and communications should adhere to the SFMTA or Muni brand standards.

Communications channels, and the development of collateral materials, are an important component of any outreach plan. A variety of tools and resources are available to support SFMTA projects of all sizes and types. Requests must be made in advance and are subject to prioritization. In particular, requests for translating outreach materials and providing on-site interpretation services at public meetings must be made as far in advance as possible, whether translation assistance is being provided in-house or by an external resource. Some larger projects may have production, collateral, copy and creative outsourced; while other projects may need to enlist the assistance of the Marketing team, which functions as an in-house agency, and can provide similar services. The PM/PL would need to meet and discuss the deliverables, timeline, and resources available so that they can better assist with their needs and prioritize each request.

SUGGESTED TACTICS

Below is a list of a variety of outreach tactics to utilize when communicating with stakeholders about a project:

General

– Project brief

– FAQs

– Media alerts and news releases

– Press conferences

– Before and after photography

Web, Social

– SFMTA.com – project pages, calendar notices, and a homepage click-through banner

– E-mail blasts

– Social media updates: Twitter and Facebook posts

– Blogs

Location Specific

– Muni alerts

– Vehicle ads

– Bus stop signs

– Station signs

– Shelter/street signs

– Parking garages

– Bike share locations

Targeted

– Letters

– Alerts

– Information ambassadors

– Table events (festivals, civic events, in station)

– Fliers: Residential, transit riders, pedestrians, merchants/businesses

– Project evaluation surveys

– Public meetings

– One on one meetings: influencers, partners, merchants/businesses

– Phone calls

– Paid or earned advertisements

Internal

– Inside SFMTA internal newsletter or intranet article

– E-mail blasts

PUBLIC MEETINGS

Public meetings are open to stakeholders and the public where the Agency, or the PM/PL, makes a formal presentation on a project and the public is given the opportunity to react with questions and comments. Public meetings allow for a level of public participation in the process and can often include legislative meetings, informal meetings, and participation in external community meetings. As a general rule, language assistance (on-site interpretation) must be provided if requested 48 hours prior to a meeting. Interpretation services may be provided by SFMTA staff, through a vendor or with the assistance of a Community-Based Organization (CBO).

Table 1: Levels of Public Engagement Examples

Criteria for Categorization	Small	Medium	Large	Extra Large
Scope and Complexity	Low	Medium	High	Very High
Duration	Up to 6 months	6 mos - 1 yr	1 yr - 3 yrs	3+ yrs
Level of Public Engagement Needed	Low Up to 2 meetings	Medium Up to 10 meetings	High Minimum 10 meetings	Very High Minimum 10 meetings CAC, TAC, Policy Group
Project Impacts (i.e. construction, transit service, EJ Analysis, Title VI requirements)	Low	Medium	High	Very High
Examples	Bulbout, move stop	MMT Subway Communications	Church and Duboce Tunnel Carl & Cole	TEP Vaness BRT
Est. FTE Hours	500	1,300	2,700	5,500

Meetings that allow for public participation are a key component to many SFMTA projects, and should occur throughout the project planning, design and implementation processes to keep stakeholders informed and engaged.

Successful public meetings first and foremost require planning. Meetings not well planned often leave participants feeling frustrated. However, the Needs Assessment, stakeholder assessment, and Communications Plan, should assist the PM/PL in laying the foundation and executing public meetings successfully. Examples of public meetings for SFMTA projects could include a community meeting hosted by SFMTA, attending a community meeting hosted by a key stakeholder group, a formal public hearing, an MTAB meeting, etc.

Below are some ideas for how to prepare for a successful public meeting:

Determine the purpose of the meeting: Is the purpose of the meeting to inform, consult, or involve the public? Most importantly, also consider whether the purpose is best achieved through a public meeting. If it's determined that a public meeting should be held, then the reasons for the meeting must be articulated to the public.

Table 2: Public Participation Types

	Inform	Consult	Involve
Public Participation Goal	Provide public with balanced information; assist them in understanding the problem, alternatives, opportunities, and solutions	To obtain feedback on analysis, alternatives decisions	Work directly with the public throughout the process to ensure public concerns are consistently understood and considered
Promise to the Public	We will keep you informed	We will keep you informed, listen, acknowledge concerns, provide feedback on how to input influenced decisions	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influence the decision

Build relationships with participants in advance: A successful public meeting will include a diverse group of key stakeholders, who have a substantial interest in the outcome of the project. Diverse participation ensures that relevant information about the project is not overlooked, and can also assist in legitimizing the final decisions or actions for the larger public.

Assess language needs: The language needs of a particular community should be assessed in advance of the meeting and appropriate arrangements made for on-site interpretation, translated materials, etc.

Provide an agenda: A public meeting agenda should be presented to the participants prior to the meeting or at the start of the meeting. This document will serve as a guide to keep the group moving forward in the discussion. The agenda should include the issues to be discussed, and the process for how the issues will be addressed.

Create a follow-up plan: Develop a strategy for following-up once the meeting is completed. Reconnecting with participants assists in preventing future obstacles and will provide another touch point to engage with key stakeholders.

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ASSESSMENT AND PLANNING TEMPLATES

In order to determine the level of public outreach and engagement needed for a project the PM/PL will be responsible for completing a Project Needs Assessment and a Communications Plan for every SFMTA project. POETS provides a template for each.

PROJECT NEEDS ASSESSMENT

A Project Needs Assessment (PNA) is a systematic process for determining and addressing how a project will affect key stakeholders. A needs assessment is a key part of the project planning process and will assist in identifying the level of public outreach and engagement needed for each project SFMTA undertakes. It can be an effective tool to gauge a project's impact on the public, and the levels of public input needed, as well as identify appropriate solutions to potential public impact. By thoroughly assessing the project in its early stages, the PM/PL will be gathering data that will inform the outreach and engagement process and lay the foundation for identifying resources and assessing the needs of key stakeholders. All of these elements are important for preparing and implementing the Project Communications Plan.

Prior to beginning any community outreach activities, a PNA will be completed by the PM/PL to determine the project's impacts on the public.

The PNA template included in the resources section of this document will guide the PM/PL with a clear view of their Project's impacts and guide them with defining and assessing the project by answering questions related to the following:

- Size and magnitude
- Public impacts
- Duration
- Budget
- Staffing for public outreach
- Project complexity
- Level of public input necessary
- Construction impacts
- Transit service impacts

COMMUNICATIONS PLAN

In execution, the Communications Plan serves as a guide to the communications tactics throughout the duration of the project. It is a living document that should be updated periodically as audience and project needs change.

The Communications Plan is scalable and will not be the same for every project. The plan for a very large project may be quite complex, whereas a smaller project may require less outreach and engagement. More stakeholders will require additional information, which could necessitate supplementary delivery mechanisms.

Implementing a well thought out Communications Plan will:

- Assist in the management of expectations for the project
- Ensure methods used for communication are effective, including addressing the language needs of involved communities, if necessary
- Assure appropriate levels of communication with internal and external stakeholders
- Provide relevant, accurate, consistent information at all times
- Generate and sustain enthusiasm and support for the project

Additionally, there may be several individuals with responsibilities for the different types of communications required by a project. There may be many steps involved in the process of developing and approving communications on a large project in order to ensure communication is accurate, effective, and sensitive to the particular needs of the communities that may be impacted by the project.

Highly visible projects may require separate public information or communications expertise. For example, a bus rapid transit project would require a much more robust communications plan and resource deployment than completing a bulb out project (See Table 1, page 5). However, most projects will require some form of external communication on a regular basis to sustain momentum on the project and to fulfill SFMTA's standards of public engagement.

PMs/PLs will be responsible for determining the level of engagement and tactics to include in the Communications Plan. The SFMTA Communications Team, and a Public Outreach and Engagement Manager (POEM), will act as a resource assisting Project Managers and Project Leads throughout the process, including finalizing a communications plan and developing appropriate tactics.

A Communications Plan is imperative to the success of realizing the Agency outreach and engagement goals. It is the responsibility of the PM/PL to prepare a comprehensive plan customized to each project, to oversee implementation and to evaluate its effectiveness.

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POETS provides a step-by-step planning tool for completing a Project Communications Plan. It guides the PM/PL on preparing the fundamental elements of the plan.

1. **Preparing a project brief.** A project brief concisely describes the scope of the Project and enables quick understanding. The PM/PL will be directed on how to prepare a project brief – summarizing its goals, benefits, start and end dates, areas of impact and potential risks.

2. **Defining communication goals.** The goals of every Communications Plan will be those of the Agency (see Introduction), but there may be other goals unique to the project. The planning template will direct the PM/PL to define those goals.

3. **Setting measurable objectives.** Measurable objectives are necessary for evaluating the changes in stakeholder understanding and support for the project as the communications plan is executed. They enable the PM/PL to make informed course corrections as necessary.

4. **Identifying the audience.** The planning template will provide tables that will enable the PM/PL to build an organized target list of the primary, secondary audiences as well as potential partners in building awareness and support. It will also guide the PM/PL on assessing the audience awareness, support, misperceptions, required behavior changes, language requirements, the project's compelling benefits, safety issues. Frequently the best way to answer these questions is to utilize past SFMTA project information on similar key stakeholders, or ask them directly, which can often be the first step in building a successful relationship with members of the community who have an interest in the project. Remember that they might not live or work in the immediate vicinity of the project.

5. **Crafting key messages.** After completing the audience section, the template will provide instructions for preparing the relevant messages for each type of audience.

6. **Preparing communication strategies and tactics.** Every project's Communications Plan will be required to include the standard strategies (as defined on page) and a list of possible tactics will be provided to assist the PM/PL with identifying the most effectives ways to inform and engage the public.

7. **Building a timeline of outreach deliverables.** Every PM/PL understands the importance of a timeline for scheduling and implementing a project plan. The template provides examples for how to build an effective action plan for outreach.

RESOURCES AND RECOGNITION

The POETS team has developed a number of resources for project managers, project leads, and other staff tasked with public outreach and engagement. The POETS website features a wide range of educational and skill-building resources available to staff, including training opportunities, on-demand webinars, an online library, and peer-to-peer support. General and agency-specific resources include guides, tools and tips, along with an expanding database of SFMTA project needs assessments and communications plans.

To acknowledge outstanding effort and results, POETS also features a recognition program in which public outreach and engagement staff can apply for three progressively higher levels of achievement, all of which come with specific rewards and benefits. The highest level – POETS Master – is reserved for those who have demonstrated positive outcomes for the agency and the community through use of best practices on a project. Each time someone becomes a POETS Master, their project will be documented as a case study to showcase effective planning and implementation. As we continue to add case studies to our resource library, our staff can learn from experience within the agency to better inform current and future projects. You can read the requirements for every level of recognition and submit an application form on the POETS website.

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SUMMARY

The San Francisco Municipal Transportation Agency is committed to ensuring that key stakeholders remain engaged and informed about the planning and implementation of key Agency projects, ensuring the SFMTA is more efficient and effective at delivering projects.

The Agency goals for public outreach and engagement are the following:

– Build trust and relationships by better managing public and stakeholder expectations

– Create a consistent model for public outreach and engagement that can be leveraged across all divisions

– Identify and deliver useful tools and resources to support public outreach and engagement

Public Outreach and Engagement Team Strategy (POETS) will be the new standard for public engagement throughout San Francisco for the SFMTA

The following process will occur for all SFMTA projects:

– All Project Managers and Project Leads will provide a Project Needs Assessment and Communications Plan for all SFMTA Projects

– The minimum level of outreach and engagement for any SFMTA project will include, but will not be limited to, Stakeholder Briefings, Multi-Channel Notification and *Public Meetings (when applicable).

| Project Manager	→	Project Needs Assessment Communications Plan	→	Stakeholder Briefings Multi Channel Communications Public Meeting
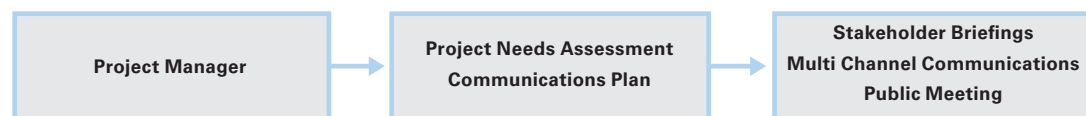
APPENDIX: EXAMPLES OF OUTREACH PROCESSES

Outlined below are examples of outreach processes for small and large complex projects that can be utilized by the PM/PL:

OUTREACH PROCESS FOR A SMALL PROJECT

- Outline goals and objectives of the project
- Identify issues and impacts related to the project
- Identify key stakeholders
- Determine the level of public involvement
- Define budget for communications resources and outreach support (i.e. Ambassadors, etc.)
- Develop an informational piece (e.g., flyer) for dissemination or repurposing, translate into appropriate languages, as needed
- If applicable, post on sfmta.com website (see resources section for assistance)
- Share information with internal and external stakeholders including Board of Supervisors
- Disseminate and post public hearing letters and notices

Table 1: Phases of Small Project Outreach

PHASE I	PHASE II	PHASE III	PHASE IV
Planning	Design	Pre-Construction & Construction	Close Out
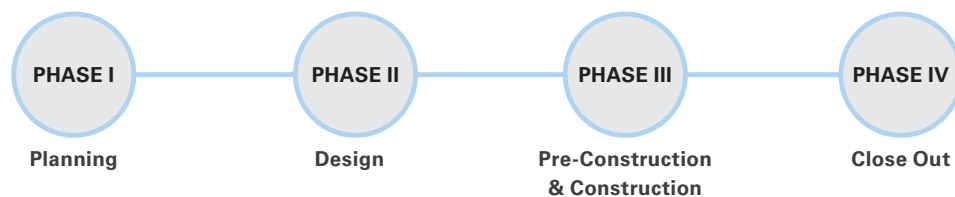
PHASE I - PLANNING

- Elected officials are notified of project, activities and impacts (input is invited)
- Information is shared with internal SFMTA stakeholders
- Residents, merchants and community organizations are identified and notified of project through a direct mail letter or briefing as needed, in the appropriate languages
- Updates are shared via social media channels
- Create graphic timeline and update as needed
- Develop and create project collateral if needed
- Webpage is created if needed

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PHASE II - DESIGN

- Public hearing notice is posted in project area
- Public hearing letters are sent to residents and businesses as needed
- Website is updated continuously with pertinent information as needed
- All of the above are translated into the appropriate languages

PHASE III - PRE-CONSTRUCTION & CONSTRUCTION

- Updates are shared via social media channels
- Graphic timeline is updated
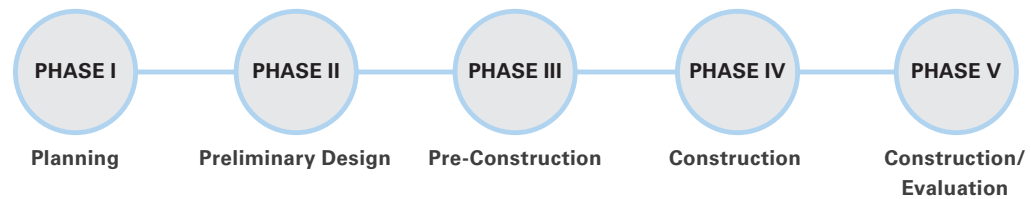- Stakeholders are notified if needed

PHASE IV - CLOSE OUT

- Updates are shared via social media channels
- Graphic timeline is updated
- Stakeholders are notified if needed
- Project Evaluation is completed

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OUTREACH PROCESS FOR LARGE, COMPLEX PROJECTS

Larger, complex projects require additional outreach and engagement over a longer period of time. The following outlines a more extensive phased approach for handling projects of a larger magnitude or projects that have significant impacts to the community; such as loss of parking, bus reroutes, or significant and/or prolonged construction.

Table 2: Phases of Large, Complex Project Outreach

PHASE I	PHASE II	PHASE III	PHASE IV	PHASE V
Planning	Preliminary Design	Pre-Construction	Construction	Construction/ Evaluation

PHASE I - PLANNING

The purpose of this phase is to determine the level of public and stakeholders' involvement and utilize this information to develop an outreach and communications plan to implement throughout the course of the project. Language needs should be assessed and incorporated in the items below as required.

- Outline goals and objectives of project
- Identify issues and impacts related to the project
- Identify key stakeholders and begin initial engagement to determine perspectives and interest level
- Brief appropriate Elected Officials
- Determine the level of public involvement that is acceptable and preferred
- Assess need for a Citizens Advisory Committee, a Technical Advisory Group or a Policy Steering Group
- Develop a timeline with major milestones for design, funding, approval and implementation with key points for outreach delineated
- Determine core messages and communications tactics such as a webpage, newsletters, mailings, email updates, flyers, posters, brochures, fact sheets, FAQs, social media, media releases and special events participation
- Budget for communications resources and outreach support (estimated hours of support x estimated project implementation period)
- Set up stakeholder database tracking and shared files infrastructure to capture and retain project information

PHASE II - PRELIMINARY DESIGN

The primary purpose of outreach and engagement during this phase is to consult with the public and key stakeholders on preliminary designs and gather input.

– Use multiple channels of communications to inform stakeholders that preliminary designs are ready for review. This can include radial mailings, emails, newsletters, community groups and city agency lists, ads in community papers, social media and media alerts, in the appropriate languages

– Host or make arrangements to participate in community meetings in order to present preliminary designs and gather input

– Engage Community Advisory Committees and other advisory groups

– Update Elected Officials, SFMTA Board, and other city agencies

– Provide a project contact (e-mail and phone) to accept project input and feedback

– At the end of the preliminary design process, after all design-related meetings have occurred and feedback incorporated, a final public meeting should be held to present the final proposed plans

– Share information related to final designs, environmental review, funding and approvals with stakeholders via website, email, SFMTA alerts, radial mailings, social media and other channels as appropriate

– SFMTA Alerts should be used on a regular basis to update project stakeholders on a quarterly basis at a minimum or more frequently, as needed

– Respond to letters and feedback in a timely manner; generally within 3-5 days

– Review and update core messages based on final designs and implementation plans

– Update communications materials and website with final designs

– Survey participants to gauge stakeholder feedback

PHASE III - PRE-CONSTRUCTION

The purpose of outreach and engagement during this phase is to inform the public and stakeholders about impending construction timing and impacts.

– Outline and clarify dates and milestones for construction

– Update SFMTA Board of Directors, Board of Supervisors, elected officials and other City agencies on planned construction plans and timing

– Send radial mailings and emails to updated database of stakeholders to inform them of impending construction

– Post construction information and updates on the SFMTA website

– Carry out communication activities related to construction through newsletters, flyers, posters, brochures, fact sheets, FAQs, SFMTA alerts, social media and other channels as appropriate

– SFMTA Alerts should be used on a regular basis to update project stakeholders on a quarterly basis at a minimum or more frequently, as needed

– Respond to letters and feedback in a timely manner; generally within 3-5 days

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Public Outreach Notification Standards
Public Outreach & Engagement Team Strategy (POETS)

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PHASE IV - CONSTRUCTION

The purpose of outreach and engagement during this phase is to inform the public and stakeholders about the construction progress.

– Update SFMTA Board of Directors, elected officials and other City agencies on construction updates and impacts

– Post construction information and updates on the SFMTA website

– SFMTA Alerts should be used on a regular basis to update project stakeholders on a quarterly basis at a minimum or more frequently, as needed

– Share progress updates with internal SFMTA stakeholders and notable external stakeholders such as advisory councils, interest groups and key community organizations

– Inform residents and merchants in the immediate area of impacts, and when applicable through a public hearing notice letter and public hearing notices posted in the vicinity, in the appropriate languages

– Field and respond to constituent complaints and perform site visit, if necessary

– Host informal meetings or participate in community meetings upon request

– Draft a media release with construction details and distribute it prior to construction (requires approval by Media Relations)

– Translate and submit media release to appropriate ethnic publications within the project area

– In the case of route changes and where appropriate, post signs in transit shelters and facilities to inform customers about changes that may affect their travel routines that may be required to facilitate the efficient, safe movement of people and traffic

– Share ongoing updates via social media and SFMTA Alerts

PHASE V - POST-CONSTRUCTION/EVALUATION

The purpose of outreach and engagement during this phase is to celebrate project completion, communicate project benefits and evaluate stakeholder satisfaction.

– Draft media release announcing project completion (requires approval by SFMTA Media Relations)

– Field post-construction evaluation survey with key stakeholders

– Prepare a Public Outreach and Engagement report comparing pre and post project findings; develop a case study if appropriate

– Maintain connections with community and stakeholders

– Utilize SFMTA Alerts to continue updating stakeholders on project improvement

– Perform Project Evaluation

The Public Outreach Notifications Standards were last updated in July 2016. An update to the standards is expected to take place in Fall 2017.

SFMTA Mission:

We work together to plan, build, operate, regulate and maintain the transportation network, with our partners, to connect communities.

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