

**AGREEMENT BETWEEN  
CITY/COUNTY ASSOCIATION OF GOVERNMENTS  
AND COMMUTE.ORG  
FOR THE COUNTYWIDE VOLUNTARY TRIP REDUCTION PROGRAM  
FOR FISCAL YEAR 2021-22**

This Agreement, effective **July 1, 2021**, by and between CITY/COUNTY ASSOCIATION OF GOVERNMENTS OF SAN MATEO COUNTY, a joint powers agency formed for the purpose of preparation, adoption and monitoring of a variety of county-wide state-mandated plans, hereinafter called "C/CAG" and Peninsula Traffic Congestion Relief Alliance, a joint powers authority, hereinafter called "Commute.org."

**WITNESSETH**

WHEREAS, it is necessary and desirable that Commute.org be engaged by C/CAG for the purpose of performing services hereinafter described:

NOW, THEREFORE, IT IS HEREBY AGREED by the parties as follows:

1. **Services to be provided by Commute.org.** In consideration of the payments hereinafter set forth, Commute.org shall provide services in accordance with the terms, conditions and specifications set forth herein and in *Exhibit A, Scope of Work*, attached hereto and by this reference made a part hereof.
2. **Payments.** In consideration of the services rendered in accordance with all terms, conditions and specifications set forth herein and in *Exhibit A, Scope of Work*, C/CAG shall make payment to Commute.org as follows. The aggregate total amount of payment by C/CAG to Commute.org for services shall not exceed five hundred ten thousand dollars (\$510,000), as shown in *Exhibit B, Budget Breakdown*, for services provided during the Contract Term set forth below, including (as applicable) labor, supervision, applicable surcharges such as taxes, insurance, and fringe benefits, indirect costs, overhead, profit, subconsultants' costs (including mark-up), travel, equipment, materials and supplies, expenses, and any fixed fee. Payments shall be made to Commute.org quarterly based on an invoice submitted by Commute.org that has been reviewed and approved by C/CAG. C/CAG shall have the right to receive, upon request, documentation substantiating charges billed to C/CAG. Payments shall be made within 30 days after receipt and approval of the quarterly invoice from Commute.org. In the event that C/CAG makes any advance payments, Commute.org agrees to refund any amounts in excess of the amount owed by C/CAG at the time of termination of this Agreement.
3. **Relationship of the Parties.** It is understood that this is an Agreement by and between Independent Contractor(s) and is not intended to, and shall not be construed to, create the relationship of agent, servant, employee, partnership, joint venture or association, or any other relationship whatsoever other than that of Independent Contractor.
4. **Non-Assignability.** Commute.org shall not assign this Agreement or any portion thereof to a third party without the prior written consent of C/CAG, and any attempted assignment without such prior written consent in violation of this Section automatically

shall terminate this Agreement.

1. **Contract Term.** This Agreement shall be in effect as of July 1, 2021 and shall terminate on June 30, 2022; provided, however, C/CAG may terminate this Agreement at any time for any reason by providing 30 days' notice to Commute.org. Termination to be effective on the date specified in the notice. In the event of termination under this paragraph, Commute.org shall be paid for all services provided to the date of termination.
2. **Hold Harmless/Indemnity.** Commute.org shall indemnify and save harmless C/CAG and its officers, agents, employees, and servants from all claims, suits, or actions of every name, kind, and description resulting from this Agreement, the performance of any work or services required of Commute.org under this Agreement, or payments made pursuant to this Agreement brought for, or on account of, any of the following: (A) injuries to or death of any person, including Commute.org or its employees/officers/agents; (B) damage to any property of any kind whatsoever and to whomsoever belonging; (C) any sanctions, penalties, or claims of damages resulting from Commute.org's failure to comply, if applicable, with the requirements set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and all Federal regulations promulgated thereunder, as amended; or (D) any other loss or cost, including but not limited to that caused by the concurrent active or passive negligence of C/CAG and/or its officers, agents, employees, or servants. However, Commute.org's duty to indemnify and save harmless under this Section shall not apply to injuries or damage for which C/CAG has been found in a court of competent jurisdiction to be liable by reason of its own negligence or willful misconduct. The duty of Commute.org to indemnify and save harmless as set forth by this Section shall include the duty to defend as set forth in Section 2778 of the California Civil Code.

This indemnification provision will survive termination or expiration of this Agreement.

7. **Insurance.** Commute.org or its subcontractors performing the services on behalf of Commute.org shall not commence work under this Agreement until all Insurance required under this section has been obtained and such insurance has been approved by the C/CAG Staff. Commute.org shall furnish the C/CAG Staff with Certificates of Insurance evidencing the required coverage and there shall be a specific contractual liability endorsement extending Commute.org's coverage to include the contractual liability assumed by Commute.org pursuant to this Agreement. These Certificates shall specify or be endorsed to provide that thirty (30) days notice must be given, in writing, to C/CAG of any pending change in the limits of liability or of non-renewal, cancellation, or modification of the policy.

Workers' Compensation and Employer Liability Insurance: Commute.org shall have in effect, during the entire life of this Agreement, Workers' Compensation and Employer Liability Insurance providing full statutory coverage.

**Liability Insurance.** Commute.org shall take out and maintain during the life of this

Agreement such Bodily Injury Liability and Property Damage Liability Insurance as shall protect Commute.org, its employees, officers and agents while performing work covered by this Agreement from any and all claims for damages for bodily injury, including accidental death, as well as any and all operations under this Agreement, whether such operations be by Commute.org or by any sub-contractor or by anyone directly or indirectly employed by either of them. Such insurance shall be combined single limit bodily injury and property damage for each occurrence and shall be not less than \$1,000,000 unless another amount is specified below and shows approval by C/CAG Staff.

Required insurance shall include:

	Required Amount	Approval by C/CAG Staff if under \$ 1,000,000
a. Comprehensive General Liability	\$ 1,000,000	_____
b. Workers' Compensation	\$ Statutory	_____
c. Employer Liability	\$ Statutory	_____

C/CAG and its officers, agents, employees and servants shall be named as additional insured on any such policies of insurance, which shall also contain a provision that the insurance afforded thereby to C/CAG, its officers, agents, employees and servants shall be primary insurance to the full limits of liability of the policy, and that if C/CAG, or its officers and employees have other insurance against a loss covered by such a policy, such other insurance shall be excess insurance only.

In the event of the breach of any provision of this section, or in the event any notice is received which indicates any required insurance coverage will be diminished or canceled, C/CAG, at its option, may, notwithstanding any other provision of this Agreement to the contrary, immediately declare a material breach of this Agreement and suspend all further work pursuant to this Agreement.

8. **Non-discrimination.** Commute.org and its subcontractors performing the services on behalf of Commute.org shall not discriminate or permit discrimination against any person or group of persons on the basis or race, color, religion, national origin or ancestry, age, sex, sexual orientation, marital status, pregnancy, childbirth or related conditions, medical condition, mental or physical disability or veteran's status, or in any manner prohibited by federal, state or local laws.
9. **Accessibility of Services to Disabled Persons.** Commute.org, not C/CAG, shall be responsible for compliance with all applicable requirements regarding services to disabled persons, including any requirements of Section 504 of the Rehabilitation Act of 1973.
10. **Substitutions.** If particular people are identified in *Exhibit A, Scope of Work*, as working on this Agreement, Commute.org will not assign others to work in their place without written permission from C/CAG. Any substitution shall be with a person of commensurate experience and knowledge.

11. **Sole Property of C/CAG.** As between C/CAG and Commute.org any system or documents developed, produced or provided under this Agreement shall become the sole property of C/CAG.

12. **Access to Records.** C/CAG, or any of their duly authorized representatives, shall have access to any books, documents, papers, and records of Commute.org which are directly pertinent to this Agreement for the purpose of making audit, examination, excerpts, and transcriptions.

To allow C/CAG to audit all expenditures relating to the services funded through this Agreement, for the duration of the service as described in *Exhibit A, Scope of Work*, and for five (5) years following completion of this agreement, Commute.org shall maintain all required records.

13. **Merger Clause.** This Agreement, including *Exhibit A, Scope of Work*, attached hereto and incorporated herein by reference, constitutes the sole agreement of the parties hereto with regard to the matters covered in this Agreement. Any prior agreement, promises, negotiations or representations between the parties not expressly stated in this document are not binding.

14. **Governing Law.** This Agreement shall be governed by the laws of the State of California and any suit or action initiated by either party shall be brought in the County of San Mateo, California.

IN WITNESS WHEREOF, the parties hereto have affixed their hands to this agreement for the Countywide Voluntary Trip Reduction Program on the day and year as indicated below.

Commute.org

By \_\_\_\_\_  
Cliff Lentz, Chair

\_\_\_\_\_  
Date

By \_\_\_\_\_  
Commute.org Legal Counsel

City/County Association of Governments (C/CAG)

By \_\_\_\_\_  
Marie Chuang, C/CAG Chair

\_\_\_\_\_  
Date

By \_\_\_\_\_  
Melissa Andrikopoulos, C/CAG Counsel

DRAFT

# Exhibit A

## SCOPE OF WORK

### Commute.org Scope of Work, FY 2021-2022

#### **Key Initiatives: FY 2021-2022**

In addition to ongoing operations, the agency focuses on several “Key Initiatives” each year. Key Initiatives can be special projects, time-critical tasks, program redesigns, or projects that require special funding. Key Initiatives can span multiple years, but they can also be projects completed in a single year. Key Initiatives that have been selected for the upcoming year include:

#### ***Equity Study and Priorities:***

- Commute.org’s Strategic Plan 2025 includes an objective that calls on the agency to integrate equity principles across all program areas. The first step in that process, which will begin in July 2021, is defining the equity principles that the agency will adopt.
- Data collection, surveying, and program analysis will be adjusted to collect the information necessary to create baseline data on how Commute.org’s programs and services are being used and whether or not that usage meets the equity principles that are adopted. This is a multi-year effort that will begin in FY22.
- We intend to convene a small task force comprised of board members to propose a target priority demographic(s) of commuters to be the focus and most impactful equity strategy for Commute.org. As modeled by Commute Seattle, after partnering with county agencies and local jurisdictions, they identified a specific income range and profile of employers that were previously underserved by their organization and for whom they felt their expertise would make the most impact as their pilot equity programming for their region.
- Our efforts in FY22 will also include targeting employers in industries and sectors that have non-peak commutes, such as – but not limited to - health care, events, hospitality and service, and manufacturing throughout San Mateo County to collect “journey maps” of these commute patterns and assess which of Commute.org services meet their needs and what new programs are needed. Employers with robust TDM programs are more likely to be designed around peak hour commutes; and therefore, new study is needed for Commute.org to understand a diversity of commute patterns.

#### ***Transit Pass Pilot Program:***

- Commute.org, in collaboration with the Palo Alto Transportation Management Association (PATMA), Caltrain, the City of East Palo Alto, and local non-profits, is working to develop a pilot project that would provide transit passes to residents and employees in East Palo Alto who meet income and commute profile criterion. The project will be modeled on a similar program that was successfully deployed in downtown Palo

Alto.

- While the funding sources, program scope, and partner responsibilities are still being determined, Commute.org will provide overall project management and will attempt to deploy the program in early FY22.

***Coastside Commute Alternatives Assessment and Program Development:***

- The coastside cities of Half Moon Bay and Pacifica have unique barriers that impact residents' ability to easily choose an alternative to driving alone to work. Commute.org will work with local stakeholders and transportation-oriented agencies to survey residents, conduct a needs analysis, research existing programs, and identify gaps that may require new programming to address the coastside's unique commute needs.
- Commute.org will work closely with the Coastside Transportation Committee, organized by SamTrans, along with other stakeholders including the County of San Mateo to ensure that the research is thorough and that the solutions fit into the overall framework for improved coastside transportation.

***STAR Platform Peer Expansion in Partnership with MTC:***

- Commute.org's STAR platform is currently dedicated to commuters that are traveling to, from, or through San Mateo County. Recently, the counties of Solano, Marin, Napa, and the Metropolitan Transportation Commission (MTC) launched their own commuter platforms with RideAmigos, the vendor behind the STAR platform. Commute.org has agreed to partner with MTC and the other Bay Area agencies to connect our individual commuter platforms (e.g., STAR) to establish an integrated ride match system to increase potential matches for commuters seeking to carpool and to grow overall STAR participation with the goal to reduce the number of drive-alone commuters.
- Commute.org's STAR platform is the largest of the regional systems and MTC has the potential to reach the greatest number of commuters in the Bay Area; therefore, our two agencies have taken the lead in making this integrated approach a reality. Work began in FY21; however, the project will extend into FY22 with a target completion by the end of the fiscal year.

***TDM Policy and Guidelines Project – Compliance and Monitoring:***

- C/CAG is in the process of updating their countywide TDM policy and guidelines. Commute.org has been engaged in the process to provide input and feedback to C/CAG and their consultants.
- During the development of the updated policy and guidelines, it became clear that for the program to be effective an entity would need to be made responsible for managing the monitoring and compliance components of the project.
- Commute.org recognized the opportunity to assist C/CAG and its JPA members by taking on that role. Additionally, Commute.org sees an opportunity to use the role to establish deeper relationships with the property developers and employers who will be

subject to the TDM guidelines.

- While C/CAG's planning efforts are still underway and the project has not been formally adopted, Commute.org has begun preparing to take on the role outlined by the project team and presented to stakeholders over the past several months.
- The first step in the process for Commute.org will be the procurement of a Customer Relationship Management (CRM)-style database that will become the repository for the data that is necessary to monitor and report on subject projects in the county. The same CRM platform can also be used to support the agency's existing employer data; therefore, this part of the TDM Policy Project Assistance initiative is also discussed in the Engagement Programs section of the work plan.
- Additional steps including the development of monitoring and reporting tools will follow as the program is formalized. Additional resources will be required to meet the program objectives and Commute.org will work with C/CAG and other funders to determine the funding and reporting requirements.

## **Program Area 1: Employer Programs**

### **Employer Outreach & Education**

- Goal: Increase adoption of commute alternative programs by employers and other entities in San Mateo County by providing TDM tools, resources, programs, and consulting.
- FY 2021-2022 Action Items:
  - 1) Become a trusted TDM resource for employers in San Mateo County by using direct and indirect marketing and outreach techniques to identify organizations that will benefit from our expertise. Not all employers will need the full suite of programs that our Employer Programs team offers but making sure that they know Commute.org is there for them when they do need assistance is critical.
  - 2) Establish strong working relationships with employers and then provide them with access to tools and programs that help them to provide their employees with meaningful commute alternatives.
  - 3) Given the diversity of employers and their different needs, we will look to transition to a new integrated CRM-style database that allows us to seamlessly segment our audience readily with marketing and surveying platforms to send different messages to different sectors and different employer sizes, using public records, website lead collectors, surveys, and direct mail in combination with the Bay Area Commuter Benefits database to verify records. We will continue to migrate our existing contacts into integrated platforms to reduce data entry work when possible, to clean out contacts that no longer engage or have turned over, to ensure the employer engagement metrics reflect actual engagement with us in real time, and to refresh our lists from new sources and new programming.
  - 4) Continue to produce telework and hybrid workplace resources that are available downloadable web content, virtual countywide events, and one-on-one consultation. Telework and hybrid workplaces is the commute mode that went from being TDM's smallest offering in terms of percentage of participation before the pandemic to a

leading player in commute options in 2020. Much of its best practices have yet to be trialed without pandemic restrictions; and therefore, Commute.org will continue to iterate and evolve our offerings in this area in the coming years.

- 5) Continue to promote the Best Workplaces for Commuters (“BWC”) program to employers in San Mateo County. Employers who participate in the program and meet specific TDM guidelines have a lower drive-alone rate for employees. Commute.org has found that it can leverage other organization’s programs (e.g., BWC) to encourage adoption of TDM practices – especially at larger employers.
- 6) Participate in San Mateo County Spare the Air Resource Team campaigns for employers sponsored by BAAQMD to increase awareness of Commute.org and target San Mateo County employers and commuters.
- 7) Continue to produce newsletters for employers called the Employer eNews to share TDM best practices, compliance, and other general topics with our vast array of subscribers. Over 2,400 employer and partner contacts receive the newsletter which is published monthly and when special situations arise.

### **Employer Support Services**

- Goal: Provide employer support services, including the STAR platform, Guaranteed Ride Home, bicycle safety and training workshops, TDM best practices consulting, and Bay Area Commuter Benefits Program support services. These programs are provided to encourage employers to make their employees aware of the vast array of programs that are available to support them in using alternative commutes. Most employers in San Mateo County do not have dedicated resources or expertise in TDM programming; therefore, the employer programs team serves as a valuable, no-cost resource to those employers.
- FY 2021-2022 Action Items:
  - 1) Promote the use of the STAR platform by employers. STAR is Commute.org’s online TDM support, tracking and rewards system. The software platform is licensed from RideAmigos and allows individual employers, cities, and organizations to have their own unique “networks” under the Commute.org umbrella. Each network has almost the full set of privileges available to the parent organization, and can control access to their network to their own employees, members, etc. As more employers look to add TDM programs to their suite of employee benefits, STAR provides them with a no-cost option. Employees benefit from this integrated toolkit by being able to take advantage of their employer’s programs as well as those offered by Commute.org.
  - 2) Provide ongoing outreach, guidance, and consulting services to those San Mateo County based employers who have not yet complied with the Bay Area Commuter Benefits Program (Regulation 14, Rule 1) or are delinquent in re-registering. The regulation became permanent in 2016, which provides the employer programs team with an added opportunity to engage with employers who have 50 or more employees in the Bay Area. Many employers who may not have been compliant in prior years may now be able to establish compliance by adopting a remote work policy that builds on the experience they gained during the COVID-19 shelter in place period.

- 3) Continue to develop TDM tools including infographics, guides, tip sheets, social media campaigns, webinars, videos, and white papers that are used to introduce small to medium employers without a formal TDM program or coordinator to commute alternatives as well as strengthen employers with devoted transportation coordinator in San Mateo County. In addition, these materials will also be geared towards providing the latest safety protocols for all modes of commuting as employers will need information on “Getting to Work Safely” as their employees return to the workplace.
- 4) Continue work on the Resource pages on the newly launched website to include TDM self-assessment tools and downloadable resources that simultaneously collect contact information, grow our mailing lists, and ability to follow-up with leads for our services.
- 5) Continue to support shared-ride services including bike share, micromobility, carpooling and vanpooling programs in JPA member cities. As part of this effort, the agency will continue to work with member cities that want to develop city-specific transportation information on their own web sites as well as on the “Connect” branded sites that exist in some jurisdictions.
- 6) Coordinate bicycle safety and training workshops with employers and JPA members either at their worksites or through city or county entities by a certified bicycle safety instructor to provide rules of the road for cyclists, tips on buying a bicycle and bicycle maintenance instruction.

## **Program Area 2 – Shuttle Program**

### **Shuttle Program Development and Management**

- Goals: Provide safe and reliable first/last mile shuttle services between employment and residential sites in San Mateo County and Caltrain, Bay Area Rapid Transit (BART), and San Francisco Bay Ferry stations/terminals so that people can utilize public transit as a primary means of commuting to or from the county. Work with consortiums of employers, property managers, and municipalities to provide matching funds to operate the service and to attract and retain ridership. Improve the overall customer experience by maintaining high standards for on-time performance, accurate schedules, clean vehicles, and courteous drivers. Provide shuttle services that are equitable, accessible, financially sustainable, and successful as measured by the funders’ targets and benchmarks.
- FY 2021-2022 Action Items:
  - 1) COVID-19 continues to have a significant impact on ridership across all routes. Essential workers have continued using the service, but service reductions have been implemented to reduce costs and to match service to the public transit systems that the shuttles serve. Getting passengers back onto public transit is the first and most important task for FY 2021-2022. Until those commuters trust that they will be safe on transit, they will choose alternatives such as driving alone. Significant efforts will be required to gain back that trust and get riders to return.
  - 2) Social distance protocols will determine the capacity levels of the shuttles. With 6-foot protocols, vehicles are only able to carry 25 percent of the normal passenger load. When that is changed to 3-feet, we will be able to carry 50-60 percent of a full

- load. That will be critical since leaving passengers behind due to capacity constraints will be difficult to overcome.
- 3) The shuttle vendor continues to use enhanced cleaning and disinfectant procedures. Additionally, Commute.org has procured hand sanitizer dispensers and anti-microbial hand rail coverings to vehicles in the fleet. The vendor and the team must be ready to continually adjust policies, procedures, and schedules until such time as the COVID-19 pandemic is completely controlled.
  - 4) Commute.org took over management of two additional routes in FY2020-2021 and additional route consolidations and management changes are expected in the new fiscal year. Commute.org is an active participant in the ongoing “Shuttle Study” that is being sponsored by the TA and Caltrain. We have pledged to shoulder additional management and customer service responsibility if that is the recommendation from the study (see notes in the Key Initiatives section of this document).
  - 5) The marketing funds that are now available to target shuttle passengers will be critically important in this fiscal year. The opportunity to reconnect with passengers who have left public transit as well as connecting with new passengers will be an important part of getting ridership back to pre-COVID levels as soon as possible.
  - 6) The “Shuttle Stop” sign replacement project was completed in FY 2020-2021. Additional wayfinding and signage projects are expected with the changes in route management. Having a consistent look for commuters is important to gaining their trust in the service.
  - 7) Commute.org’s website was redeveloped in FY 2020-2021. Since most of the shuttle riders, who make up half of the site visitors, have not been using the shuttles since the website was changed, we anticipate having an increased level of customer service to get them acclimated to the new site layout and tools.
  - 8) Since all Commute.org shuttle routes have regularly updated GTFS files, the routes are also available to all third-party software developers for inclusion in trip planning, transit screen, and mobility as a service offering. Expanding the inclusion of Commute.org shuttles into more apps and services will continue to be an objective for the Shuttle Program team.
  - 9) Commute.org introduced a Text Alerts program in October 2017 and as of April 2021 there are over 3,500 active subscribers. The shuttle teams at Commute.org and SamTrans have used the service to send over 100,000 messages to subscribers since the service was launched. Being able to communicate with passengers whether it is to notify them about a schedule change or alert them to an issue on the route has been invaluable. The teams are always monitoring developments in technology and transit to make sure that the tools we use are the best available.
  - 10) Conduct shuttle monitoring checks to ensure vendor compliance with agency policies and procedures. Each route should be monitored at least quarterly. This target may grow as additional routes are added to Commute.org shuttle management program. Much of the route monitoring can be done remotely with the tracking tools; however, in-person checks are still important to conduct.

### **Program Area 3 – Commuter Programs and Incentives**

#### **STAR Platform**

- Goal: Provide commuters with the tools, programs, and incentives that not only encourages their shift to non-drive alone modes, but also provides ongoing support and incentives for them to continue using preferred commute mode(s).
- FY 2021-2022 Action Items:
  - 1) The agency will continue with the deployment and promotion of the STAR Platform as the primary online tool that Commute.org uses to promote, track, and incentivize alternative commuting behavior. The tool, provided by software vendor RideAmigos, was branded as the STAR platform when it was first deployed in 2016. The tool has grown in popularity and scope over the years.
  - 2) The STAR platform has given the agency a tool that generates measurable impacts in real-time. Sharing these impacts with commuters, employers, partners, and funders helps to reinforce the positive behavior that we are seeking from commuters. Data is tracked at the individual level but is presented in anonymized and aggregated ways.
  - 3) The Challenge module of the STAR platform was used in the past four Commuter Challenges. The 2020 and 2021 Commuter Challenges were cancelled due to the COVID-19 crisis; however, the Challenge module was adapted to encourage both essential workers and non-essential workers who could telework to log their “commutes” to become eligible for prize drawings.
  - 4) Quarterly Challenges are now a regular part of the Commuter Programs team’s programming. Each quarter a different mode or collection of modes are selected to be the focus of the challenge. Using the STAR platform for challenges has resulted in more meaningful engagement with the participants than in prior years when commuters participated passively in “pledge” programs.

### **Guaranteed Ride Home (GRH) Program**

- Goal: Provide commuters and college students in San Mateo County with a form of “commute insurance” that supports their use of alternative commute modes by providing a ride home or to a local transit station in the mode of their choice when a qualifying event occurs (e.g., sickness, family emergency, unplanned overtime, bicycle breakdown).
- FY 2021-2022 Action Items:
  - 1) The Guaranteed Ride Home (GRH) program was launched in January 2018. The program is built on the STAR platform and requires participants to create accounts and log their non-drive alone trips to claim reimbursement for qualified GRH rides.
  - 2) GRH is consistently ranked as one of the most important programs we offer. It is perhaps the only program we run where success is not necessarily measured by the number of times it is used. Since GRH is insurance, the Commuter Programs team is most interested in getting people to be aware that it exists. It gives commuters peace of mind knowing that if they use an approved alternative mode to commute to work, then they will be able to get home in the event of a qualified emergency, illness, or commute situation.
  - 3) The Commuter Programs team will use a combination of new techniques and proven social media to expand interest and participation in the program. They will work with the Employer Programs team to make sure that employers push the program out to

their employees. A co-marketing program is being designed whereby marketing collateral is developed by Commute.org and customized for each employer.

- 4) When commuters use a qualifying alternative commute mode and experience an emergency while at work or college, they can use any form of transportation to get home, such as public transit, ride-hailing app (e.g., Uber or Lyft), car share, or taxi, and be reimbursed up to \$60 per trip up to 4 times a year.
- 5) The GRH program is open to anyone who works or attends college within San Mateo County on days when they do not drive alone to work. Employees who have similar benefits from their employers are not eligible.

### **Carpool and Vanpool Incentive Programs**

- Goal: Provide commuters with direct incentives to encourage them to adopt carpooling or vanpooling as a primary commute option.
- FY 2021-2022 Action Items:
  - 1) Continue promoting and managing the carpool incentive program that was launched in late 2018. Originally the program was called “Carpool 2.0” but transitioned to Carpool 2020 in January 2020 and then to Carpool 2021 in January 2021. Prior to the pandemic, the program was very effective at encouraging people to use carpooling as an alternative commute mode. COVID-19 significantly reduced participation in the program, but we anticipate a gradual increase in program participation as worksites begin welcoming back employees and commuters look to reestablish carpool partnerships. In fact, we think there is going to be a big opportunity to help commuters find new partners so this program combined with the carpool matching tools in STAR will be a great combination in FY 2021-2022.
  - 2) The Carpool incentive program allows carpoolers that log trips on Scoop or Waze Carpool to earn rewards for every 10 days of carpooling (maximum reward is reached after 40 days of carpooling). The verified carpool data that is sent to STAR from Scoop and Waze Carpool provides details and insights into commute behaviors that we have not been able to see before. The carpool incentives are funded through a special TFCA grant provided by C/CAG; however, staff costs for the program are primarily supported through the Congestion Relief Program funding agreement with C/CAG.
  - 3) To encourage more people to use vanpools as an alternative to driving alone, the commuter programs team developed and launched a new Vanpool incentive program that was modeled after the Carpool incentive program. This new incentive replaced the existing vanpool incentives; however, due to the pandemic, there was very little new participation in vanpooling. We expect that to change in the coming year for many of the same reasons why we expect carpooling to increase. Many vanpools will be searching for new participants and this incentive program is a great way to encourage new riders to join existing vanpools and for groups to consider forming a new vanpool.
  - 4) Collaborate with MTC, Enterprise Rideshare, and private employers to fill vacant seats in existing vanpools by using the STAR platform’s vanpool module to inform commuters of available vanpools.

- 5) Support partner programs like 511's "Carpool to BART" preferred parking program, "Five Free Rides" carpool app program, and other regional promotions.
- 6) Conduct post-incentive surveys of the STAR platform incentive participants to determine if they are continuing to utilize the commute alternatives and measure success of the programs.

### **Bicycle Incentive Program**

- Goal: Encourage more San Mateo County commuters to use bicycling as an alternative to driving alone for both first/last mile commutes as well as full-length commutes.
- FY 2021-2022 Action Items:
  - 1) Prior to 2020, Commute.org had never offered an incentive to commuters to encourage them to use a bicycle as a regular mode for their commutes. A new incentive program was developed over the past year that incentivizes bicycle commuting.
  - 2) The incentive was based on the carpool incentive program and shares many of the same program features/requirements: 1) it operates on the STAR platform; 2) commuters need to use a "connected app" to log verified bicycle commutes; 3) up to \$100 in incentives are available for a commuter to earn (40 days of bicycle commuting); 4) surveys and STAR platform data are used to determine program effectiveness.
  - 3) Our experience has shown that encouraging and incentivizing commuters is not enough when it comes to bicycle commuting. Educating them about all aspects of bicycling is an added necessity. During the early months of the pandemic, the Commuter Programs team partnered with Silicon Valley Bike Coalition to produce a 5-part bicycle education webinar series. The webinars covered topics from safe commuting to buying the correct bicycle. All the webinars were recorded and are now available online for commuters to view.
  - 4) When social distancing restrictions allow for on-site bicycle education courses, the Commuter Programs team in collaboration with the employer programs team will look for opportunities to bring certified bicycle trainers to locations where commuters can get in-person training to augment the online training. These sessions will also serve as an opportunity to promote the Bicycle incentive program.

### **Bike to Work Day(s)**

- Goal: Participate in Bay Area wide event to promote the use of bicycling as a viable form of commuting.
- FY 2021-2022 Action Items:
  - 1) Due to the pandemic, Bike to Work Day 2021 has been recreated as Bike Month 2021. Since so many of the target participants are not working at worksites, the region chose to make the entire month of May a month to encourage recreational and commute bicycling. Agency staff is working with lots of partners to make the 2021 event a success and looks forward to an even more robust event in 2022.

- 2) Commute.org functions as the county-wide coordinator for the Bay Area Bike Month. Coordination entails: Recruiting and managing volunteers to staff the Energizer Stations; evaluating locations and organizations for new Energizer Stations; promoting, coordinating, and selecting the Bike Commuter of the Year for San Mateo County; organizing and supplying the handouts for participants; promoting the event through employers, cities, organizations, and the media; working with the region-wide event coordinator (Bay Area Bicycle Coalition); and keeping statistics on the event participation.
- 3) Promote Bike Month to residents and employees in San Mateo County with a goal of increasing participation in bicycle commuting.
- 4) Distribute promotional items and educational material in the Bike Month bags that riders receive at Energizer Stations and local libraries. The items are designed to encourage participants to adopt bicycling as a commute alternative on a regular basis.
- 5) Continue to recruit and support the employers, non-profits, cities, and other groups that volunteer to set-up and staff Energizer Stations in San Mateo County. Visit as many Energizer Stations as possible on Bike to Work Day to thank volunteers and ensure compliance with station procedures.

### **Try Transit Incentive Program**

- Goal: Increase ridership on public transit – Caltrain, SamTrans, BART, and SF Bay Ferry.
- FY 2021-2022 Action Items:
  - 1) Collaborate with transit partners (existing and new), on our ongoing Try Transit media campaigns and ticket distribution program.
  - 2) Promote the Try Transit program to potential riders who currently drive alone. Provide program information to employer ETC's and directly to commuters at employer fairs, and via the Commute.org web site. The commuter programs team will continue with the direct mail campaign that targets specific San Mateo County residents (those who live near transit stations) since we have determined that direct mail campaigns result in significant increases in applications for the program.
  - 3) Conduct surveys of incentive participants to determine if they are continuing to take transit on a regular basis after receiving the tickets.
  - 4) Produce annual reports for the transit agencies that provide the tickets and secure new tickets to continue program with partnering agencies.

### **Direct Marketing and Communication with Commuters**

- Goal: Provide commute alternative information directly to commuters that travel to, through, from, or within San Mateo County so that they can make informed choices on commute options.
- FY 2021-2022 Action Items:
  - 1) Plan and implement media campaigns to broaden awareness of Commute.org and its programs including the STAR Platform.

- 2) Use an assortment of media types to reach commuters in San Mateo County. Commute.org develops an annual media plan that includes advertising and messaging across traditional and social media platforms. The agency has effectively used digital billboards, online radio, online news sites, social media sites, bus-sides, and specialty video locations to promote the full suite of programs. While we have shifted away from printed material, direct mail pieces are still a useful tool when targeting residents.
- 3) The Commute.org site continues to be a useful tool for commuter communication. The website averaged over 10,000 sessions each month prior to the pandemic. We expect the website activity to grow as commuters either return to their worksites or look for alternatives due to the increased congestion that is expected to materialize later this year. The new website, which was launched in April 2021, improves the user experience, and makes it easier for visitors to get the information they need. Managing the transition to the new site will be an important ongoing task for all the program teams in the new fiscal year.
- 4) Continue to produce and distribute the monthly electronic newsletter for commuters called the Commuter Club. The e-newsletter has proven to be an important tool for the Commuter Programs team. The team studies “open rates” and other metrics to make sure the content is valuable and timely.

#### **Program Area 4 – Public/Private Partnerships**

##### **Funding and Resource Development**

- Goals: a) Retain existing funding sources through successful project delivery; b) Seek additional funding to address identified needs and plans developed in collaboration with SMCTA and C/CAG; c) Work with partners to ensure 100% sustainability of existing funding; d) Establish relationships with public and private sector partners that further solidify the agency as the region’s leading TDM agency.
- FY 2021-2022 Action Items:
  - 1) Ensure that Commute.org is the recognized funding partner to implement transportation demand management (TDM) initiatives on behalf of other transit, transportation, and local government partners in San Mateo County.
  - 2) Measure W funds are being made available for additional alternative congestion relief (ACR) programming. Commute.org is serving on the committee that is providing guidance to the TA on how those funds should be used. While Commute.org does not expect to be the only agency seeking those funds, it does expect to forge partnerships with other agencies and municipalities to leverage those funds into programming that will benefit the residents of San Mateo County.
  - 3) Represent San Mateo County as well as the Bay Area’s TDM agencies on the MTC Blue Ribbon Transit Recovery task force. Commute.org was selected to participate on the 30-member task force. The agency’s executive director has been representing a broad array of public, private, and non-profit organizations as the task force attempts to guide the future of the Bay Area’s public transportation network. The task force will likely conclude its business in early FY22.

- 4) Expand financial participation by employers, property owners, and residential communities on consortium-funded shuttle routes. Additional participation lowers the cost for all participants and helps to ensure the sustainability of the shuttle program.
- 5) Provide managerial support to the San Mateo Rail Corridor TMA. Since FY 2010-2011, Commute.org has helped the TMA to get established as a stand-alone non-profit (501(c)(4)) organization that provides services to its members in and around the Bay Meadows development area. Commute.org agreed to continue as the administrator of the TMA during the past fiscal year and expects that relationship to continue into the foreseeable future. The administrative functions (e.g., insurance, taxes, membership management) will eventually be performed by a third-party organization chosen by the TMA members.
- 6) Use the experience with the San Mateo Rail Corridor TMA to assist other cities and business districts on TMA program development.
- 7) Work with partners who are collaborating on measures to expand TDM practices throughout San Mateo County.

### **Development of Community-Based Mobility Services**

- Goal: Assist cities in San Mateo County with the development, implementation, and improvement of community-based mobility programs. While Commute.org's focus remains on peak-hour commute trips and a first/last mile shuttle program that serves commuters and residents, the agency is able to assist members with other mobility programs.
- FY 2021-2022 Action Items:
  - 1) Commute.org has taken the lead in developing a resource guide for micromobility. The original research was conducted by the City of San Mateo and then expanded and updated by our Climate Corps fellow. The research has been published and it will need to be continually updated to provide staff from San Mateo County cities and towns with policy, process, and best practices related to shared-ride services, bikeshare, and other micromobility issues.
  - 2) Work with cities and community organizations that operate community shuttle projects to help them understand the keys to success. Serve as an advisor of best practices when it comes to questions they may have through the application and development process.
  - 3) Continue to participate in the Shuttle Study project sponsored by the San Mateo County Transportation Authority, Caltrain, and SamTrans. When the recommendations are published, the agency will implement the changes that will strengthen the shuttle program.
  - 4) Assist cities and community organizations with the development of routes that are eligible to receive funding from the San Mateo County Shuttle Program Call for Projects. Assistance may include route design, vendor coordination, shuttle monitoring, and general technical assistance.
  - 5) Assist SamTrans with their Reimagine SamTrans efforts in ways that will support the agency's mission. Advocate for additional connections to regional rail stations and expansion of express bus service to key employment locations.

## **Program Area 5 - Agency Development**

### **Strategic Plan 2025 Performance Monitoring**

- Goal: Ensure that the agency sets priorities, focuses resources, strengthens operations, and ensures that staff and other stakeholders are working toward the goals and objectives set out in Strategic Plan 2025.

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- FY 2021-2022 Action Items:
  - 1) The plan was developed over a 15-month period and was formally adopted by the board in April 2021. It is intended to serve as the guiding plan for the agency through FY2025.
  - 2) The plan was developed under the direction of a Strategic Plan Steering Committee. The committee was comprised of board members Lentz, Beach, Hurt, Holober, O'Neill, Romero, and Bonilla.
  - 3) Commute.org will use the OnStrategy software platform to manage the agency's progress on meeting the goals and objectives set forth in the plan. The software will be used to assign and track progress on individual and team level initiatives. It will also be used to provide internal, stakeholder, and board-level performance reporting.
  - 4) As initiatives are defined, they will be added to the platform, assigned to a person or team, and linked to a key performance indicator (KPI). Since each initiative includes a target completion date, the tool will be able to assist the management team in understanding where the agency is in relation to the overall timeline for the plan.
  - 5) It is important to note that only items from the strategic plan will be included in this platform and reporting. The agency has many other programs, services, and activities that are not specifically included in the Strategic Plan. Those items as well as the items included in the plan will be reported on in quarterly and annual reports.

### **Finance and Budget**

- Goal: Ensure the integrity of the financial reporting and budgeting process and increase operational efficiencies.
- FY 2021-2022 Action Items:
  - 1) Continue working with the City of San Carlos, which serves as the agency's fiscal agent, on improvements to the financial and accounting practices of the agency.
  - 2) Review all activities and programs to determine those that are most effective and those that are underperforming based on performance measurements adopted.
  - 3) Adjust the budget to match Commute.org's role and responsibility of the county-wide shuttle program – as changes necessitate.
  - 4) Refine budget process and categories to align with programs more closely. Work with the City of San Carlos to modify the chart of accounts to better understand program costs and effectiveness.
  - 5) Continue to move as many bank transactions as possible to ACH processing. Payments and deposits can be shifted to ACH to reduce processing delays and to streamline accounting functions.
  - 6) The agency is in year two of a 3-year office lease extension. Changes to the office layout have been made to accommodate social distancing inside the office. The current space is sufficient for the current staff, but additional space may be required if there is an expansion of staff and/or if it is determined that the agency needs to establish a presence in other parts of the county.

### **Governance**

- Goals: a) Ensure meaningful participation by each key constituency of Commute.org including employers, commuters, and public and private partners; b) continue to ensure that all new Board members receive full orientation to Commute.org’s mission and goals as soon as they are appointed to the Board; c) ensure that the Strategic Plan is monitored and updated on a regular basis.
- FY 2021-2022 Action Items:
  - 1) Accountability and Transparency Initiatives:
    - a. As part of Commute.org’s newly adopted Strategic Plan 2025, the agency will renew efforts to create an “Accountability Toolkit” that contains board approved permanent governance documents.
    - b. Staff, partners, directors, and volunteers will review the accountability documents and acknowledge their acceptance and understanding by executing a Conflict-of-Interest form.
    - c. Annually, the Executive Director conducts an orientation session for all employees on the agency’s commitment to and implementation of accountability and transparency.
    - d. New employees, as part of their orientation will be required to review the accountability documents either in printed form or on Commute.org’s website and acknowledge their understanding. Further, employees who are in management positions will execute Conflict of Interest forms.
  - 2) Update agency by-laws, as necessary, to align with the agency’s structure and mission.
  - 3) Comply with all county and state-mandated reporting and transparency initiatives.
  - 4) Conduct orientation for new Board and committee members following the first Board meeting after new Board members have been appointed.

### **Administration and Business Practices**

- Goals: a) Ensure adoption of Commute.org’s newly defined mission and assess all innovative programs and activities to maintain adherence to the mission; b) attract and retain quality employees; c) foster a culture of environmental stewardship and sustainability.
- FY 2021-2022 Action Items:
  - 1) Review and update the Emergency/Disaster Planning documents to reflect changes in the agency’s location, scope of work, and other factors. Use the experience gained from the COVID-19 crisis to adjust the plan. Commute.org’s role as a provider of public transportation necessitates continual review and refinement of emergency plans.
  - 2) All staff members completed the mandatory Sexual Harassment training in 2019. New hires will receive training within six months of their hire date. Existing employees will be required to receive additional training as required.
  - 3) All staff is currently CPR certified. New hires will be encouraged to take the CPR training offered by the Red Cross. Additional training on emergency preparedness and first aid will be provided as part of our ongoing staff training program.

- 4) Review existing performance measurements, and then utilize a prioritization framework for formal policies and criteria to evaluate new opportunities that emerge to develop or manage programs and initiatives.
- 5) Work with the agency's board and committees as well as program managers to review/update employee wellness program, leadership development and succession plan and potential opportunities to develop grant applications that have an environmental or energy technology component.
- 6) All staff participate in an annual Security Training course provided by the IT services and support vendor.
- 7) Maintain certification in the San Mateo County Green Business Certification program. The agency was first recognized as a certified green business in 2019.

### **Communication**

- Goals: a) heighten awareness of Commute.org and create more powerful, compelling communications; b) increase employer participation in transportation demand management programs through communication efforts directly to San Mateo County employers to reach their employees.
- FY 2021-2022 Action Items:
  - 1) Publish an Annual Report that can be used to showcase the efforts of the agency and serve as a "call to action" document for municipalities and employers in San Mateo County.
  - 2) Use the agency's new website to provide information about transportation alternatives in San Mateo County, provide shuttle riders with schedule and route information, provide real-time tracking of shuttles, provide employers with access to the commute alternative planning tools and services provided by the agency and its partners, and provide links to the websites of our partner agencies and other Bay Area transportation providers.
  - 3) Use a variety of marketing tools to promote, encourage, and sustain non-drive alone commute alternatives. Marketing includes print and direct mail pieces as well as digital marketing on streaming radio, search engines, web sites, etc. Advertising on highway digital billboards has proven to be effective and will be continued. Other advertising platforms that are being considered include: bus sides, transit interiors, and transit kiosks. Social media continues to be an essential element of the agency's marketing efforts with campaigns on Facebook, Twitter, Instagram, YouTube, and LinkedIn.
  - 4) Commute.org plans to outreach to San Mateo County residents by sending a direct mail piece to residential addresses. The direct mail piece will reach tens of thousands of households. The piece(s) will promote the new Commute.org website, and the many programs and services available to them with the goal of encouraging commuters to use a sustainable mode of travel to work or college.
  - 5) Agency staff uses the agency's vehicle (Prius Hybrid) to travel to all vents in the county. The vehicle was "re-wrapped" in FY2020 to match the branding on the shuttles. This new wrap supports the agency's marketing efforts by making the company vehicle highly visible to commuters.

- 6) Provide phone support about general information relating to transportation alternatives to driving alone, including HOV, public transit, shuttles, and Park-and-Ride facility information to callers who call (650) 588-8170 or (650) 588-1600. Additionally, the shuttle program also has a toll-free number (833-426-6688) that is used for the Text Alert program but also allows passengers to text comments and questions to the team.
- 7) Use the recently licensed CivicClerk agenda management and meeting platform to share information more effectively with the public. The online tool that is embedded in the new Commute.org website allows for members of the public to register and receive notification when agendas are published, and meeting materials are posted. Board and committee members will also be able to use the new platform to participate in meetings in both an online and in-person format.

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# **Exhibit B**

## Budget Breakdown

*Pending submittal from Commute.org. To be added prior to agreement execution.*

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