Proposal

October 2023

Strategic Plan Development

City/County Association of Governments of San Mateo County
245902P1

steer

Los Angeles
800 Wilshire Blvd, Suite 1320,
Los Angeles, CA 90017
USA

usainfo@steergroup.com
t: +1 (213) 425 0990
www.steergroup.com

11 November 2023

Steer Ref. 245

Attn: Sean Charpentier, Executive Director
City/County Association of Governments of San Mateo County
555 County Center, 5thFloor
Redwood City, CA 94063

Dear Mr. Sean Charpentier,

Re: C/CAG Strategic Plan Development

Thank you for considering the following proposal in response to the City and County Association of Governments of San Mateo County (C/CAG) Request for Proposals for C/CAG Strategic Plan Development. Our team understands this effort presents a terrific opportunity for your organization to craft a meaningful vision and set of strategic priorities for San Mateo County. We offer an approach that acknowledges the challenges of navigating this process and aims to build trust and alignment among Board members, engages agency staff to leverage their insights, and emphasizes structured, evidence-backed decision making.

Please accept this letter as acknowledgement of the provided RFP, as well as the Question and Answer document (November 9, 2023), and confirmation of Steer's interest and commitment to this project. We have not identified any actual or perceived conflicts of interest that would limit our ability to provide the requested services. We acknowledge that this proposal represents a firm 120 day offer to enter into a contract with C/CAG and to perform work related to the RFP.

As described in our enclosed Work Plan, we have the resources and capabilities to deliver the proposed Scope of Work within the nine-month timeframe. Our team will be able commence work immediately upon issuance of a Notice to Proceed.

I, Alasdair Dawson, am Steer's Regional Director and President of our United States business, and I have the authority to solicit business and enter into contracts for the firm. For questions, clarification or other contact during the selection process please contact Patrick Miller, Associate, at **Patrick.Miller@steergroup.com** or

Yours sincerely

Alasdair Dawson
Regional Director
1 213 425 0941
Alasdair.dawson@steergroup.com

cc Patrick Miller

steer

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Prepared by:

Steer
800 Wilshire Blvd, Suite 1320,
Los Angeles, CA 90017
USA

+1 (213) 425 0990
www.steergroup.com

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Executive Summary

Overview

We understand that the City/County Association of Governments of San Mateo County (C/CAG) is undertaking the development of a Strategic Plan intended to shape the agency's vision and strategic priorities over the next 3–5-year period. C/CAG is governed by a 21-member board of directors consisting of one county supervisor and one city council member from each of the 20 cities and towns within San Mateo County. The agency was created to address common issues among its member jurisdictions related to transportation, water and wastewater management, and airport land use. Over time, its official roles and responsibilities have grown to include a wide range of planning and resource management activities across a range of public services and infrastructure. This programming is delivered by a relatively small team in terms of number of staff.

The effort to develop Strategic Plan presents a tremendous opportunity to create a shared vision for the agency and the region and to establish a clear and achievable roadmap to that vision.

Steer is an independent, international, employee-owned transportation planning and advisory firm. Headquartered in London, Steer has a network of offices around the world including North American offices in Oakland, Sacramento, Los Angeles, Vancouver, New York, Boston, Washington DC, Toronto, and Mexico City. We have worked with multidisciplinary public agencies in the Bay Area and California to develop successful, outcomes-focussed Strategic Plans. Our team understands that the process of creating a credible, actionable, and purpose-driven Strategic Plan is complex.

Our approach is characterized by:

Building Trust to Achieve Consensus- An effective plan development process will need to foster collaboration among C/CAG staff and 21 elected Board of Directors representing the different communities C/CAG serves. Our team of skilled facilitators will work to build trust and alignment through successive touch points with staff and Board members – maximizing efficiency and preparing the organization to deliver the plan successfully.

Thoughtful Engagement - C/CAG's official roles and responsibilities span many areas of specialization. We will work to the insights and expertise of C/CAG staff, the people who know the agency's needs, challenges, and processes the best, and use these insights to their greatest advantage.

Structured, Evidence-backed Decisions – Alignment on a short list of priority goals and objectives can requiring sifting through a lot of information and comparing programs strategies across disciplines. We will apply a structured, evidence-informed method for assessing different options that is reasonable and agreed by the executive team to demonstrate why decisions make sense.

To deliver this project, we have assembled a team of experts, senior advisors and supporting consultants with relevant experience in strategic policy development, engagement with executive leadership and staff, and local knowledge of Bay Area and San Mateo County issues. Our team will be led by Patrick Miller (Project Director), Kate Bridges (Project Manager) and Richard Batty (Expert Advisor), who have each worked collaboratively with staff, executive leadership, and board members at large public agencies to develop Strategic Plans, including the Long Beach Airport Organization Plan and Action Plan (2021) and the C/CAG Measure M 5-Year Strategic Plan (2021), both included in our project qualifications and work samples.

1 Work Plan

1.1 Project Understanding

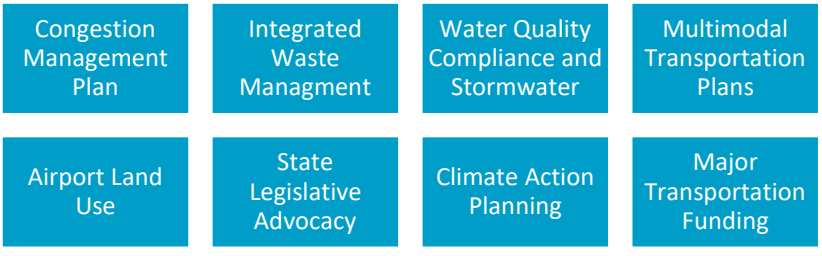
The following section presents our understanding of the key issues that may influence the development of the strategic plan and our approach to navigating those issues.

1.1.1 Background

With a 21-member Board of Elected Officials and under relatively new Executive Leadership, C/CAG is embarking on a timely process to develop a 3–5-year Strategic Plan. This plan will focus the agency's activities on a common Vision and set of Strategic Priorities. A successful plan will include a clear and consensus-based understanding of the agency's purpose, vision for the future, and core values that guide day-to-day activities. The plan will articulate action-oriented goals and objectives to serve as a blueprint to achieve that vision.

C/CAG is a unique agency: it serves 21 San Mateo County jurisdictions, and its activities span a wide range of planning and resource management activities across a range of public services and infrastructure. This programming is delivered by a relatively small team in terms of number of staff. C/CAG's remit includes many official roles such as:

- Congestion Management Agency (CMA) overseeing the Congestion Management Process
- Member of the San Mateo County Express Lanes Joint Powers Authority (SMCEL-JPA)
- Compliance assistance with Regional Water Quality Permit and facilitates the design construction, and operation of multi-benefit regional storm water projects
- Supervisor of the Regional Integrated Climate Action Planning Suite (RICAPS) initiative, which assists local jurisdictions with the preparation of Climate Action Plans
- Administrator for the Energy Watch Program, which identifies projects an refers customers to energy efficiency retrofit installers, among others



1.1.2 Our Approach

Our team understands that the process of creating a credible, actionable, and purpose-driven Strategic Plan is complex – more art than science. The process requires more than checking off the individual steps or components that go into the plan, but rather a nuanced approach to building shared aspirations and values among the Board and the staff at each step – from early situation analysis, to visioning, to the retreat – to galvanize the agency into action.

 **Building Trust to get Consensus**	An effective plan development process will need to foster collaboration among C/CAG staff and 21 elected Board of Directors representing the different communities C/CAG serves. Candid discussions, honest reflection and some negotiation will likely be required to achieve consensus around a common vision and an achievable set of strategic priorities. The Steer team brings decades of experience helping executives and elected officials navigate complex policy making and planning decisions. We rely on our team's emotional acuity to develop and execute a work plan that builds trust and collaboration through successive touch points with staff and Board members. This results in not only a more efficient journey from Vision to Plan, but also an organization better prepared to deliver the Strategic Goals and Objectives over the next 3-5 years.
 **Thoughtful Engagement**	C/CAG's official roles and responsibilities span many policy areas from multimodal transportation to water resources to energy. Crafting a Strategic Plan will naturally require knowledge of these areas of specialization as well as an understanding of how responsibilities are delegated through the organization. Our team will focus on engagement with C/CAG staff to leverage the insights and expertise of the people who know the agency's needs, challenges, and processes the best, and use these insights to their greatest advantage.
 **Structured, Evidence-backed Decisions**	Navigating from a long list of regional priorities to a short list of priority goals and objectives can requiring sifting through a lot of information and comparing programs strategies across disciplines. Based on our experience, this requires a structured, evidence-informed method for assessing different options that is reasonable and agreed by the executive team to demonstrate why decisions make sense. The benefit is again a more streamlined, resource efficient process to make decisions and an effective and actionable Plan.

1.2 Work Plan by Task

The following section explains our work plan at a high level, outlining the value of each deliverable, the timeline for completion, and how our team will leverage each successive touchpoint with C/CAG staff and board members.

1.2.1 Key Deliverables and Value Add

Steer's approach to strategic planning, tried and tested over many years by the proposed team, recognizes that the way in which staff and stakeholders are engaged during the planning process is just as important as the quality of the Strategic Plan document itself. C/CAG needs a clear future vision for the organization and how it will compete successfully; staff need to own the vision and the plan to achieve it, understand their individual roles in delivering the plan, and work effectively with their colleagues and business partners to do so.

To this end, our approach has the following key characteristics:

- **Staff-led** – We bring our industry expertise and facilitate the process, but it is C/CAG's plan, developed by your staff. We help you engage the Board of Directors and staff to leverage their expertise through all phases of development, with input from all business functions.
- **Expedited** – Our nine-month timeframe provides discipline, continuity, and priority, resulting in a more effective process and a more useful product.
- **Concise** – Plans frequently have so many goals and objectives that the organization is incapable of delivering them; we encourage staff and Board members to define a manageable number of goals and objectives that will not overwhelm the organization.
- **Outcome-focused** – We assist with development of performance measures and specific action plans, with assigned responsibilities to provide accountability.
- **Collaborative** – our broad staff and stakeholder engagement ensures a collaborative working and consensus-building environment.

"Steer provided a stellar team for us to work with and we are pleased with our final product. We appreciated Steer's flexibility during the pandemic as we pivoted to virtual process." – Cynthia Guidry, Director of Long Beach Airport

Figure 1.1 Summary of Work Plan

Task	Steer Value	Deliverables
Project Administration	Our leadership team brings local expertise in Strategic Planning for public agencies and a focus on communication and quality assurance.	• Project Kick-off Meeting • Weekly project management meeting agendas and action items • Invoices with progress reports
Background Review and Situation Analysis	We leverage both international expertise and local knowledge to understand the internal and external factors influencing C/CAG's strategic priorities over the next 3-5 years.	• Draft SWOT analysis summary • Final SWOT analysis summary
Draft Vision Statement, Strategic Priorities and Project List	We will progressively engage with staff to develop a "Working Vision" and set of Strategic Priorities that draw upon the wealth of knowledge that C/CAG staff bring.	• Draft C/CAG Vision Statement • Final draft C/CAG Vision Statement • Draft Strategic Priorities • Final draft Strategic Priorities
Priority Setting Retreat with C/CAG Board of Directors	Our team includes experts with decades of experience engaging executive level leadership in complex decision-making processes. We will prioritize a clear, structured approach to finalizing priorities and building consensus.	• Stakeholder interviews • Draft Board of Directors survey • Final Board of Directors survey • Board workshop agenda and supporting materials • Post Board workshop summary
Development of Strategic Plan	We will support the development of a concise and outcome-focused Plan that is achievable and credible to diverse audiences in San Mateo County.	• Draft Strategic Plan • Presentation to C/CAG staff • Final Draft Strategic Plan • Final Strategic Plan
C/CAG Board of Directors Work Session and Approval	We will refine the Plan through engagement with the Board, committees and C/CAG staff in a collaborative way to build consensus and mobilize the agency to achieve the vision.	• Up to six presentations to C/CAG Standing Committees • Two presentations to C/CAG Board of Directors
Optional Tasks As Needed	We can also help to align the staff and capabilities of C/CAG via Workforce Analysis to support eventual delivery of the Plan.	• Workforce Analysis (included in the Strategic Plan)

1.2.2 Interdependencies

Our approach is organized into seven tasks as described in the RFP's scope of work. However, we recognize the interdependencies between these tasks and propose organizing them across three phases of Plan Development, shown in **Figure 1.2** Project Phases and Timeline**.** These phases can also be thought of as work sprints, with activities focused on achieving important milestones:

- Phase 1 – Understand important context including an array of perspectives on the organizations strengths, weakness
- Phase 2 – Building on the context in phase I, develop a common Vision, Purpose, and Values as well as Strategic Priorities
- Phase 3 – Gather the results of progressive engagement into a concise, clear, and robust Plan
- Phase 4 – Deliver the plan and iterate as necessary to achieve Vision

Figure 1.2 Project Phases and Timeline

Note: Steer's proposed scope of work and budget cover phase 1-3 of plan development.

2 Scope of Work

2.1 Approach

The following section presents our technical approach to Strategic Plan Development, with a focus on innovative techniques gleaned from previous international and national experience to deliver the plan collaboratively and efficiently among C/CAG Board members and staff.

2.1.1 Project Administration (Task 1)

Steer will provide proactive project administration for this effort led by Project Director Patrick Miller and Project Manager Kate Bridges. They will be responsible for scheduling and facilitating project meetings with the client team, providing timely and complete project updates, and maintaining agreed budget and timeframes. All project management will be conducted under our ISO 9001 certified Quality Management System to ensure efficient and effective completion of the project. Our project administration approach blends rigor with flexibility to respond to emerging issues while focusing on efficient and effective delivery of scope.

This task will be ongoing from project kickoff in mid-December 2023 to completion in September 2024, and will include the following key activities:

- Project KO meeting with C/CAG staff to include Steer PM and PD. An agenda will be developed in advance and submitted 24 hours in advance for approval/comment. The KO meeting will involve a review of the scope and deliverables, timeline and key milestones, and project communication protocols.
- Regular check-ins will occur at a cadence that aligns with client availability (for example biweekly) to provide updates on work progress and address challenges as they arise.
- Additional project meetings will be scheduled to coincide with key milestones/deliverables. All project meetings will have agendas and minutes prepared by Steer that flag key action items.
- Invoices and progress reports will be submitted on a monthly basis per the requirements of the contract.

Table 2.1 Task 1 Deliverables

Deliverable	Review and Approvals
Project Kick-off Meeting	Agenda submitted 24-hours in advance for approval.
Regular project management meeting agendas and action items	Weekly or bi-weekly depending on client availability.
Invoices with progress reports	Monthly invoices per terms of contract.

2.1.2 Background Review and Situation Analysis (Task 2)

The Steer team will identify the internal and external factors that will influence the Strategic Plan through a systematic review of background documents and a situation analysis. The purpose of this task is to build a shared understanding among the consultant team and C/CAG of the challenges and opportunities present in the Bay Area as well as the agency's relative strengths and weaknesses that shape the agency's response.

Background Review

Task 2 will begin with a systematic review of important planning and policy documents to understand how local, regional, state, and federal may influence the Strategic Planning process in particular with respect to: alignment with important regulations and policy, opportunities for funding, and projects and programs that may impede or boost C/CAG priorities.

Steer will leverage its local expertise and considerable experience working with agencies like C/CAG, MTC, SFCTA, BART, CCJPA and CARB to deliver the document review efficiently, focused on the most important themes and questions for Strategic Planning. Table 2.2 presents an example structure for the review – which includes documents developed by C/CAG, wider San Mateo planning documents outside of C/CAG's purview, Bay Area documents, and state or federal documents as relevant. Examples have been provided as a non-exhaustive list. The documents to be reviewed will be defined in collaboration with C/CAG staff during the kick-off and subsequent PM meetings.

Table 2.2 Preliminary Document Review

Focus	Example Documents	Rational for Inclusion/Questions
C/CAG	• C/CAG Joint Powers Authority Agreement • C/CAG By Laws • C/CAG FY 2023 Budget • C/CAG 2 Year Work Plan • C/CAG Draft Equity Assessment and Action Plan	Review of these documents will provide a foundational understanding of C/CAG's powers and responsibilities and provide input for a long list of priorities to be refined through subsequent tasks.

Focus	Example Documents	Rational for Inclusion/Questions
San Mateo County	• Caltrans, SamTrans,	Local and regional policy documents will provide important context with respect to opportunities.
Bay Area	• Plan Bay Area • Position Papers by Organizations, Academics, and Advocates	Regionally focused plans and policies will inform the situation analysis and provide broader understand of landscape in which C/CAG operates.
State/Federal	• State Rail Plan • CARB's Climate Action Scoping Plan	State-level planning documents and grant requirements may be helpful to understand opportunities for funding and project advancement.

Situation Analysis

Following completion of the document review, Steer staff will prepare an analysis of strengths, weaknesses, opportunities, and threats. The purpose of the SWOT analysis is to inform subsequent strategic planning tasks and to highlight the most important issues and their respective relationship to C/CAG's priorities. Steer has previously worked with C/CAG staff to conduct a SCOR analysis (Strengths, Challenges, Opportunities, Risks). We can discuss the benefits of these two approaches with C/CAG team and determine the appropriate framing for this exercise.

Steer proposes engaging C/CAG staff during a focused workshop meeting to present the findings of the document review and workshop the SWOT analysis. The SWOT analysis will also be used to inform activities associated with Task 4 engagement with the Board of Directors. Therefore, during this meeting, Steer staff will also seek to understand the additional inputs and evidence that may be collected during the survey and interviews. This meeting will be conducted virtually. Following the meeting, Steer will finalize a draft SWOT analysis and submit for C/CAG review and comment.

Table 2.3 Task 2 Deliverables

Deliverable	Review and Approvals
Staff Meeting 1 – Background Review	Discuss preliminary findings, workshop SWOT analysis, and identify additional evidence and inputs.
Draft SWOT Analysis Summary	1 round of review and comments
Final SWOT Analysis Summary	1 final round of review and comments; changes may be reflected in the final version included in the Draft Strategic Plan.

2.1.3 Draft Vision Statement, Strategic Priorities and Project List (Task 3)

Building on the SWOT analysis, Steer staff will again work collaboratively with C/CAG staff to develop a Vision statement that articulates the agency's purpose, values, and goals. We propose that the Vision Statement actually include a package of statements to serve as guidance for day-to-day operations as well as strategic thinking about the future.

Table 2.4. Vision Statement

Statement	What it is	Why it's helpful
Purpose (or Mission)	The agency's core purpose and reason for existence.	It defines "what we are here to do, and why we do it."
Vision	What the agency aspires to be, the collective ambition for the next defined period (could be longer than 5 years).	Sets out the Vision for the next 3-5 years or beyond; becomes the focal point for the strategic priorities to
Core Values	Guiding principles, not always included in a strategic plan but can serve as enduring tenets of the organization.	Defines "what we believe in and how we intend to work with one another, and with our stakeholders."
Strategic Goals and Objectives	Strategic Goals are specific statements that define the key drivers for achievement of the Vision. Strategic Objectives are the key priorities which, taken together, build towards realization of Strategic Goals.	Establishes the roadmap to achieve the Vision over the next 3-5 years; can be used to further identify performance measures (how to know if agency has achieved an objective) as well specific actions for implementation.

To develop the Vision Statement, Strategic Priorities and Project List, we also recommend convening two (2) staff workshops to occur in advance of the Task 4 Retreat. These workshops will be convened virtually and will employ various interactive tools (such as Miro Board) to facilitate group brainstorming and triaging ideas.

The Steer team has led successful similar workshops with agency staff across multiple departments in the developing of Strategic Plans, for example the Long Beach Organization Assessment and Strategic Plan.

Several lessons learned will be applied to the C/CAG process including:

- Enlist support from C/CAG staff in organizing the meetings and maximizing staff participation.
- Review the C/CAG organizational chart and nominate staff to lead break-out discussions based on departments or assigned responsibilities to ensure representation across the organization and areas of expertise.
- Ensure that staff understand the workshop format ahead of time and are provided login and set-up information if required.

Table 2.5 Task 3 Deliverables

Deliverable	Review
Staff Workshop 2 and 3	Workshop 2 – Discuss Purpose, Vision, and Core Values Workshop 3 – Discuss Goals and Objectives
Draft C/CAG Vision Statement	1 round of review and comments leading to board retreat.
Final draft C/CAG Vision Statement	1 final round of review and comments; changes may be reflected in the final version included in the Draft Strategic Plan.
Draft Strategic Priorities	1 round of review and comments leading to board retreat.
Final draft Strategic Priorities	1 final round of review and comments; changes may be reflected in the final version included in the Draft Strategic Plan.

2.1.4 Priority Setting Retreat with C/CAG Board of Directors (Task 4)

Our team will also engage with the C/CAG board of directors through interviews and surveys, which will ultimately lead to a full-day retreat.

Conduct interviews with key stakeholders

We will initiate engagement with the C/CAG Board through a series of interviews. These will include at a minimum six (6) interviews of roughly 45-60 minutes:

- C/CAG Board Chair and Vice Chair (2)
- Up to 4 other C/CAG Board members (4)

The interviews will occur concurrently with activities associates associated with Task 2 so that they will be informed by the preliminary findings of the background review and SWOT analysis. Interviews will be semi-structured with a pre-developed survey tool to cover the following:

- Individual and organizational priorities
- Key issues uncovered during the background review and situation analysis

- Gaps in the preliminary analysis
- Desired outcomes for the Board retreat and the project as a whole

We understand that C/CAG's scope of work requires at least one meeting with C/CAG staff in advance of the retreat. We have proposed multiple meetings with staff as described in Task 2 and 3 to advance the Visioning and Strategic Priorities. Meetings 1 and 2 will be scheduled to lead into the retreat and fulfill this scope obligation.

Distribute survey to Board of Directors

We will develop and distribute a brief survey to the C/CAG Board of Directors to gather additional input and perspectives on Agency goals and priorities. The survey will use an electronic survey tool (Survey Monkey, Google) for ease of distribution and data collection. The purpose of the survey will be to clarify issues and themes uncovered during the background review and to begin to develop a common language/understanding of C/CAG's vision and strategic priorities. Survey questions will also be designed to understand how Board members wish to participate in workshop sessions at the retreat and what style of group brainstorming might work best for them.

Convene All-Day Saturday Retreat

Our team will convene an all-day Saturday retreat with C/CAG staff consisting of a series of work sessions to explore the materials developed through each stage of previous engagement with staff and the Board of Directors.

The specific format for the retreat will be defined during the study. Our experience facilitating board strategy sessions and retreats suggests the format will include some of the following:

- Reflections on how the organization works/has worked and people's respective contributions
- Brainstorming, sharing and triaging ideas about C/CAG purpose, values, and Vision
- Action oriented discussions about details of strategic priorities and best course forward

In preparation, our team will:

- Work with C/CAG staff to organize the retreat at C/CAG facilities or an alternative convenient venue. We will also arrange meals/refreshments
- Develop a detailed workshop agenda and format for the work sessions based on Board input from the survey; including the style of workshop discussions, exercises, break-out sessions and so on.
- Prepare supporting materials including a PowerPoint presentation, worksheets, and boards.
- Ensure that the Board knows about the exercises and prompts ahead of time and has a chance to reflect and prepare if desired.

- After the retreat, we will develop a clear and concise post workshop report that summarizes the key discussions, decisions, action items, and remaining open questions.

Table 2.6 Task 3 Deliverables

Deliverable	Review and Approvals
Stakeholder interviews	Six (6) interviews including the Board Chair and Vice Chair and four (4) other members
Draft Board of Directors survey	1 round of review with C/CAG staff
Final Board of Directors survey	Distributed electronically at least 4 weeks in advance of the Board retreat
Board retreat (all-day)	1 in-person all-day meeting with Board staff
Board workshop agenda and supporting materials	1 round of review and comment with C/CAG staff
Post Board workshop summary	Meeting minutes from

2.1.5 Development of Strategic Plan (Task 5)

Our team will compile the deliverables of tasks 1-4 into a comprehensive strategic plan which will include the overarching vision, purpose and values of the organization as well as a clear roadmap for implementation consisting of strategic goals, objectives, action, and timelines.

In addition, the Work Plan will incorporate an assessment of staff resources and funding capabilities. The workforce assessment proposed is described further in Optional Task 7.

We will prepare the draft plan for presentation to C/CAG staff before distribution to the C/CAG Board of Directors, special committees and the public.

The Plan will be finalized following comments from C/CAG Board of Directors and special committees.

Table 2.7 Task 5 Deliverables

Deliverable	Review and Approvals
Draft Strategic Plan	1 round of review with C/CAG staff and comments.
Presentation to C/CAG staff (Workshop 4)	Virtual presentation to formally discuss comments.
Final Draft Strategic Plan	1 round of review with C/CAG staff and comments.
Final Strategic Plan	

2.1.6 C/CAG Board of Directors Work Session and Approval (Task 6)

After the draft Strategic Plan has been made public, our team will prepare presentation materials to seek input from stakeholders, including the C/CAG staff, C/CAG Standing Committees and the C/CAG Board of Directors, in advance of Plan adoption.

Per the specifications the Response to Questions (issued November 9), we have budgeted to have at least one presentation to the C/CAG Board be convened in person with the leadership team.

Table 2.8 Task 6 Deliverables

Deliverable	Review and Approvals
Up to six (6) presentations to C/CAG Standing Committees and staff (virtual)	1 round of review and comment for C/CAG staff on presentation materials
Two (2) presentations to C/CAG Board of Directors (in-person and virtual)	1 round of review and comment for C/CAG staff on presentation materials

2.1.7 Optional Tasks As Needed (Task 7)

After having developed an effective Strategic Plan, it is essential that C/CAG has the right organization to deliver it. Based on our initial assessment of the organization in Phase 1 and our continuing work with the organization through Phase 2a, we can help reconfigure your organization as needed to meet future demands.

Depending on the requirements of the situation, the scope may include some or all of the following:

- Design of an effective organization structure, aligned with the future direction of C/CAG;
- Definition of organizational capabilities required and identification of gaps in the current organization;
- Review of actual resource levels compared to estimated resource requirements and industry norms; and
- Outlines of roles and responsibilities for key positions that are new or reconfigured.

Table 2.9 Task 7 Deliverables

Deliverable	Review and Approvals
Draft Workforce Assessment	1 round of review and comments from C/CAG staff
Final Workforce Assessment	To be included in the Draft and Final Draft Strategic Plan for review and comment.

2.2 Schedule

The following is a more detailed view of the nine-month schedule including periods for client review, deliverables and workshops or other engagement with C/CAG.

Task	Description	18-Dec	25-Dec	1-Jan	8-Jan	15-Jan	22-Jan	29-Jan	5-Feb	12-Feb	19-Feb	26-Feb	4-Mar	11-Mar	18-Mar	25-Mar	1-Apr	8-Apr	15-Apr	22-Apr	29-Apr	6-May	13-May	20-May	27-May	3-Jun	10-Jun	17-Jun	24-Jun	1-Jul	8-Jul	15-Jul	22-Jul	29-Jul	5-Aug	12-Aug	19-Aug	26-Aug	2-Sep	9-Sep
TASK 1	**Project Admin**																																						
	Background Review and Situation Analysis																																						
TASK 2	Background Review																																						
	SWOT Analysis																																						
TASK 3	**Vision Statement & Strategic Priorities**																																						
	Draft Vision Statement																																						
	Strategic Priorities																																						
TASK 4	**Priority Setting with C/CAG Board**																																						
	Interviews																																						
	Survey																																						
	Retreat																																						
TASK 5	**Development of Strategic Plan**																																						
	Draft Strategic Plan																																						
	Final Strategic Plan																																						
TASK 6	**C/CAG Board of Directors Work Sessions**																																						
	Presentations to C/CAG Board																																						
	Presentations/Work Sessions w/C/CAG staff and commitees																																						
TASK 7 (Optional)	**Workforce analysis**																																						

Phases

1. Organizational Assessment
2. Visioning and Strategic Priorities
3. Strategic Plan Development
4. Implementation

Active Task
Client review
Deliverable
Workshop or engagement

3 Cost Proposal

3.1 Proposed Budget

We have provided a not-to-exceed cost proposal that includes cost breakdowns by task and subtasks in the excel template included in Appendix B of the RFP (Attachment A of this proposal).

The cost estimate shall include personnel classifications, hourly rates, overhead rates, and any other cost items necessary to perform each of the tasks/sub-tasks listed in the Scope of Work.

The rates included are for a 9-month period and are firm for the initial contract term. Annual rate escalation shall not exceed 3%.

The following is a summary of our cost proposal. The detailed break-down of this proposal can be found in Attachment A – Steer Cost Proposal.

TOTAL PROJECT COST (without Optional Tasks)	**$114,284.19**
Subtotal of Optional Tasks	$9,520.00
TOTAL PROJECT COST (with Optional Tasks)	**$123,804.19**

A Supplemental Materials

A1 Qualifications

Our interdisciplinary team brings together experience delivering strategic plans for public agencies throughout North America with a deep understanding of issues and challenges unique to the Bay Area. The following section presents our team structure and qualifications.

A1.1 Project Leadership

The Steer team will be led by professionals with experience developing organizational strategies for agencies in the Bay Area and elsewhere. The following section includes summaries for our project leadership and senior advisory panel, an explanation of the structure of our team, and resumes for proposed staff. We propose a leadership team composed of the following:

Patrick Miller, Project Director

Patrick is an experienced transportation consultant bringing 13 years of experience leading strategic planning, fares policy/strategy and evaluation projects in the Canada and internationally. He currently leads Steer's North American Transport Strategy and Business Case market team.

Patrick advises clients on strategic planning, evaluation, and business case analysis to advance effective transport solutions for complex urban/regional challenges. His approach to fare policy development is to apply structured decision-making principles to balance ridership, revenue, equity, wider goals (such as environmental goals), stakeholder participation, and management of uncertainty.

He has a demonstrated track record of applying effective problem solving, communication, project management, and stakeholder engagement skills to deliver successful transport evaluation and business case projects. He has key experience developing strategic plans and business cases to support senior decision-makers and agency staff. Patrick has managed Steer's fares portfolio since 2015, for some of North America's largest transit agencies and regions.

Kate Bridges, Project Manager

Kate is a Principal Consultant in Steer's Los Angeles office with a background in strategic policymaking, multimodal transportation planning, and transportation demand management. She has a range of skills including data analysis, transit service planning, policy development, and public outreach and engagement. She is experienced working with public sector clients including agencies, municipalities, and regional governments to build consensus and develop recommendations to align with an organization's goals. Kate is passionate about helping clients plan better transportation systems that improve quality of life and support sustainability, climate action and equity initiatives.

Richard Batty, Expert Advisor

Richard is an Associate Director with Steer, with over 30 years' experience in strategy and organizational effectiveness in North America, Europe, and Asia. He has recently advised on the development of strategic plans and action plans at several U.S. airports and seaports, including Los Angeles World Airports (LAWA), Port Houston, Hawaii Department of Transportation (Airports), City of San Jose (Airport Department), and the Connecticut Airport Authority. Richard facilitates the development of strategic plans establishing an organization's mission, vision, goals, objectives, and key performance measures, with broad participation from employees and stakeholders, and guides the development of action plans to drive implementation. The development of LAWA's strategic plan in 2016-17 was a major project initiative requiring concerted effort and communication across a large organization, and formed the basis for the transformation of LAWA which is in progress today.

Richard has also led reviews of organizational structure and staffing, most recently at LAWA where he worked with senior management to redefine the role of the Chief Operating Officer and other key positions. At San Diego County Regional Airport Authority, he recommended a new structure for the capital development function, and similarly for the strategy, marketing and communications functions. For the Port of Seattle, Richard managed a workforce staffing review for the Aviation Division and led further organizational review for other Port departments including Police, HR, and Small Business Development. Previously, he focused on improving organizational effectiveness in the U.K. rail industry.

Stephen D. Van Beek, Peer Review

Stephen is a Director and Head of North American Aviation with Steer. He has 20 years of experience representing airports and leading airport consulting projects. These include assignments on airport and board governance, strategic planning, policy and regulation, as well as financial advisory. Clients have included over three dozen U.S. airports (such as San Francisco, Los Angeles, Hollywood-Burbank, and Denver Airports), the Federal Aviation Administration (FAA)/U.S. Department of Transportation (U.S. DOT), private equity and developers, Fortune 100 companies, airport trade associations and the Transportation Research Board's cooperative programs. Stephen has worked successfully

with Richard Batty on many occasions, including directing the development of strategic plans at the Massachusetts Port Authority (Massport) and the Connecticut Airport Authority.

In addition to representing airports, Stephen has served in senior government, non-profit and board positions that have provided him with an integrated perspective on the role airports play in aviation, transportation networks and the greater economy. He is a past member of the FAA's Management Advisory Committee.

A1.2 Senior Advisors

Julia Wean

Julia is a transportation planner with ten years' experience working on strategic planning initiatives and implementation of mobility strategies. She has worked with both public and private partners to advance regional transportation goals, promote alternative transportation solutions and demonstrate the impacts of their actions; included C/CAG in the past. Her project experiences in California and beyond have included strategic planning and implementation of TDM programs and strategies, transit planning initiatives, consensus building and identifying evidence-based solutions that support shared goals for governance and policy work, business case work and community engagement and outreach.

Michael Snavely

Based in the Bay Area, Michael brings 18 years of experience in transportation policy and strategic planning, including expertise in transit and rail planning; multimodal corridor planning and programming, system and corridor performance evaluation, scenario planning, and strategic visioning. Michael brings expertise in policy development, stakeholder coordination and strategic planning to translate complex analysis and policy constraints into actionable insights and tradeoffs for agencies at the local, regional, and statewide levels.

His experiences include management and oversight of policy and strategic planning projects such as the Caltrans California Transportation Plan 2050; the Oregon Statewide Transportation Strategy; LA Metro Mobility Matrices for South Bay Cities, North County, Gateway Cities, and San Gabriel Valley; the Metro Long Range Transportation Plan, including development of the initial Equity Focus Communities (EFCs) framework; and the LA Metro Gateway Cities Strategic Transportation Plan. He has led large-scale policy and analytics projects for other agencies including Caltrans, SCAG, BART, SANDAG, and the State DOTs of California, Nevada, Hawaii, Oregon, and Washington.

Emily Alter

Based in the Bay Area, Emily brings over a decade of policy evaluation and development skills with a deep commitment to racial and social equity across her work. She uses both qualitative and quantitative analytical methods, as well as robust community partnerships, to deliver sustainable projects and plans that respond to the needs of communities. Her experiences include several long-range planning efforts, community partnerships, Active Transportation Plans, Urban Greening and Economic Development Action Plans, and research programs to evaluate the impacts of land use, anti-displacement, and housing policies.

A1.3 Resumes

Patrick Miller

Associate

I bring experience leading strategic planning, evaluation, and business case analysis to advance transport solutions for complex urban and regional challenges. I have developed business case frameworks for major North American agencies and conducted evaluations/led business cases for regional transport strategies/plans, fare strategies/policies, rapid transit, regional rail, transportation demand management, and High-Speed Rail. Across these projects, I have applied innovative techniques to develop robust business cases and strategies that enable decisions makers to understand how transport solutions enable cities and regions to become more sustainable, liveable, and economically competitive. Across my experiences, I have a demonstrated track record of applying effective problem solving, communication, project management, and stakeholder engagement skills to deliver successful transport evaluation and business case projects.

Relevant skills

Transportation Evaluation and Business Case Development: Patrick brings experience developing business cases for a range of infrastructure and policies. He has worked on major programs (such as GO Expansion) and complex policies (including fare integration). Patrick's approach to evaluation and business case development is focussed on providing key insights that can be used to inform strategic direction and guide future project development efforts. Patrick led the development of the Metrolinx (Ontario), TransLink (British Columbia), and Infrastructure Canada business case frameworks. These frameworks have now been applied to over $60bn in investment across Canada.

Transportation Strategy, Planning, and Policy Development: Patrick has well-developed policy development and planning skills that are combined with an awareness of contemporary transport issues. He has in-depth experience working with a variety of types of data, information, and evidence to develop innovative solutions to transport challenges. Throughout his experiences as a professional and academic, Patrick has applied his analysis skills to explore complex issues and develop unique insights in a variety of contexts such as policy development, plan alternatives analyses, and innovative transportation research.

Project Development and Management: Patrick brings experience as an effective communicator, facilitator, and project manager from work in academic, non-profit, and consulting. Throughout these experiences, Patrick has led the development of a variety of projects – including planning studies, policy development projects, public outreach campaigns, and program evaluations. Patrick combines these experiences to support the development of effective projects that leverage international experience and are aligned with local needs and context.

Qualifications

University of Calgary
PhD. Transportation
2013

University of Calgary
BSc. Civil Engineering
2010

Years of experience

10 Consultancy
3 Non-Profit/Academic

Languages

English – Fluent
Spanish – Intermediate
Japanese – Beginner
Mandarin – Beginner

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Projects Summary

Transportation Strategy, Planning, and Policy Development	Bay Area Rail Governance Review	MTC	2021-2022, Bay Area	Project Director
	CCJPA Fare Policy	CCJPA	2022, Bay Area	Bay Area
	Ferry Fare Policy	NYC EDC	2021, New York	Project Director
	Scenario Planning for Decision Making	Metrolinx	2021 -2022, Toronto	Project Director
	Measure M 5-Year Strategy	CCAG	2020-2021, San Mateo County	Project Director
	Metrolink Strategic Business Plan	Metrolink	2020, LA	Project Director
	GO Bus 10-Year Bus Strategy	Metrolinx	2020, Toronto	Project Director
	RTC Hub Connections Study	GTAA/Metrolinx	2019, Toronto, ON	Project Manager
	Inter-City Rail Wider Economic Benefits	Transport Canada	2019, Ottawa, ON	Project Director
	Metrolinx TDM Project Management Guidance	Metrolinx	2018-2019, Toronto, ON	Project Director
	Sacramento Council of Government TMA Business Planning	SACOG	2018-2019, California	Business Planning Advisor
	GTHA Fare Integration Strategy	Metrolinx	2018, Toronto, ON	Project Director
	TransLink Fare Policy Phases 2-4	TransLink	2017-2018, Vancouver, BC	Project Manager
	TransLink Fare Policy Phase 1	Translink	2015-2016, Vancouver, BC	Lead Analyst
	Metrolinx Strategic Evaluation Framework	Metrolinx	2016, Toronto, ON	Project Manager
	Regional Transportation Plan Review – Overarching Planning Paper	Metrolinx	2014-2015, Toronto, On	Lead Analyst
	Regional Transportation Plan Review – Transport Demand Management Working Paper	Metrolinx	2015, Toronto, On	Project Manager
	Edmonton Downtown LRT Expansion	City of Edmonton	2011, Edmonton, AB	Analyst/Planner
	UBC Line Rapid Transit Study	Translink	2011, Vancouver, BC	Project Support
	Lonsdale Quay Station Area Plan	TransLink	2011, North Vancouver, BC	Analyst

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Kate Bridges

Principal Consultant

I am a Principal Consultant in Steer's Los Angeles office with a background in strategic policy and multimodal transportation planning. I am passionate about helping clients navigate the complexities of strategic policymaking to realize their visions for more just, equitable and sustainable communities.

Relevant skills

Strategic Planning and Policy: Kate has experience developing strategic policy and evaluation frameworks for agencies, municipalities, and regional governments including businesses cases for transportation investments, needs and opportunities assessments, and program evaluations, among others. She employs a diverse skillset to help clients understand and solve for complex problems with a focus on meaningful engagement and evidence-based solutions. These skills include project management, stakeholder engagement, policy and best practice review, quantitative analysis, and geospatial analysis. Her recent project successes include a business care for regional fare integration in the San Francisco Bay Area and a plan and roadmap for California's intercity bus network.

Multimodal Transportation Planning: Kate supports a variety of multimodal transportation projects. Her relevant skills include data analysis, transit service planning and analysis, policy review and development, geospatial analysis, and public outreach/engagement. Her diverse project experience includes the OCTA Safe Routes to School Action Plan, the Irvine First Last Mile Plan, and the development of Active Transportation Toolkits for the Southern California Association of Governments (SCAG), among others.

Policy Research and Sectoral Analysis: Kate has specific experience in designing and conducting academic research to inform complex policy and planning decisions. As a graduate student, Kate participated in a Caltrans-funded research project to understand how socioeconomic, built environment, and other factors influence walking behavior in California. Her support included preliminary mapping, statistical analyses, and literature review. More recently, she had led the development of a White Paper for the California Air Resources Board, exploring innovative funding and financing solutions for shared mobility programs that serve rural, low-income, and disadvantaged communities. She is presently leading a consultant team to examine the health impacts of public transportation for the National Academies of Science Transportation Research Board.

Mainstreaming Equity in Planning Processes: Kate's approach to planning and policy development recognizes the impacts of racism and intersectional oppression in transportation planning. As an experienced project manager, Kate is committed to mainstreaming equity in the project lifecycle by engaging meaningfully with stakeholders, building a more democratic decision-making process, and understanding the impacts of transportation investments to historically marginalized groups.

Qualifications

University of California, Los Angeles
Master's Degree Urban and Regional Planning
2016

Pomona College
BA Human Evolution and Cognition
2004

Professional memberships

American Planning Association
Member

Years of experience

8 Transportation Planning
6 Marketing/Communications

Credentials/Training

SCAQMD Rule 2202 ETC Training

Publications

Voulgaris,C, E. Blumenberg, M. Brozen, K. Bridges. *Are These Streets Made for Walking? Walking and the Built Environment in Four California Cities*. (2017) CT Transportation Research Board 96th Annual Meeting, Washington D.C., Transportation Research Board.

Brozen, M., K. Bridges, C. Turley Voulgaris, E. Blumenberg (2017). *Improving Next Generation of Travel Demand Models to Better Represent Pedestrian Needs: A Case Study of Large California Metropolitan Planning Organizations*. Transportation Research Board 96th Annual Meeting, Washington D.C., Transportation Research Board.

Projects summary

	Project	Client	Year/Location	Role
Transportation Strategy/ Policy Development	Geary/19th Avenue Subway Strategic Case	SFCTA	2023-Ongoing	Project Manager
	Health Impacts of Public Transportation	NAS-TRB	2022 – Ongoing/ National	Principle Investigator
	Muni Metro Modernization (Decision Framework/ Performance Measures)	HNTB/SFMTA	2023	Project Manager
	Innovative funding and financing tools and strategies for shared use mobility projects	CARB	2022 – 2023	Project Director Task Lead – White Paper
	Fare Policy Review Study	CCJPA	2022 – 2023	Project Manager
	California Intercity Bus Study (CIBS)	Caltrans	2021 – 2022	Project Manager
	MTC Rail Governance Reform Grant	MTC	2021- 2023	Project Manager
	Bay Area Fares, Coordination & Integration Project (FCIS)	MTC/BART	2020 – 2022	Project Manager
	Long Beach Airport Organizational Assessment and Strategic Plan	Long Beach Airport	2020 – 2022/ Long Beach, CA	Project Support
	Support for Regional Mobility Policy Update Phase 1-2	Oregon Metro	2020 – Ongoing/ Portland, OR	Project Manager
	Regional Travel Options Program Evaluation 2019	Oregon Metro	2019 –2020 Portland, OR	Project Manager
	Portland TDM Inventory Phase II Needs and Opportunities Assessment	Oregon Metro	2018 – 2020/ Portland, OR	Project Manager
	Portland TDM Inventory Phase I (Data collection and mapping)	Oregon Metro	2018 – 2019/ Portland, OR	Project Manager
	SCAG Strategic TDM Plan	SCAG	2018 – 2019/ Southern California	Deputy Project Manager
	City of Carlsbad TDM Ordinance and Commuter Benefits Program	SANDAG	2016-2018/ Carlsbad, CA	Project Coordinator

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Richard Batty

Associate Director

Richard has over 30 years' experience in strategy and organizational effectiveness, mainly for airports and other transportation organizations.

Since joining Steer in January 2020, Richard has advised on development of strategic plans for airports at Los Angeles, Raleigh-Durham, Asheville, Long Beach, and Vancouver, and has conducted organizational reviews for the airports at Seattle, San Antonio, Long Beach, and Raleigh-Durham. Richard also advises on business case development for Link21, a program to transform Northern California's passenger rail system.

Prior to joining Steer, his North American airport clients also included Houston Airport System, San Diego County Regional Airport Authority, Massachusetts Port Authority, the City of San Jose Airport Department, Hawaii Department of Transportation, and Connecticut Airport Authority.

Previously, Richard focused on organizational effectiveness in the U.K. rail industry, playing a key role in the creation of Network Rail (U.K. rail infrastructure manager) and the turnaround of its business performance.

Relevant skills

Strategic Planning and Business Case Development: Transportation providers, like all organizations, need effective strategic plans – providing common direction and engagement for staff, and setting out the actions required to achieve the vision. Richard facilitates the development of strategic plans establishing an organization's mission, vision, goals, objectives, and key performance measures, to achieve broad participation and buy-in from employees and stakeholders. He also directs the development of business cases for major infrastructure programs, evaluating alternative options to achieve a program's goals and objectives.

Organizational Effectiveness: Development of a successful, high-performing organization requires not only the right strategic plan but also the right organizational structure, capabilities, resources, processes, and systems required to deliver the plan. Richard leads organizational reviews to define appropriate organizational structures, assess resource requirements, and recommend improvements to organizational effectiveness. He works closely with management teams to support implementation of the findings.

Governance and Transaction Advisory: Richard has advised on a wide variety of governance studies and transactions, including: feasibility study and transition planning for change of governance of an airport system; market review of fixed base operation (FBO) services at U.S. airports; negotiation of an airport lease extension; creation of Network Rail (U.K. rail infrastructure manager) and its acquisition of Railtrack; concessioning of Argentina's state postal service; and negotiation of a joint venture between two logistics businesses.

Qualifications

Cambridge University, U.K.
MA Mathematics
1987

Cambridge University, U.K.
Diploma Mathematical Statistics
1984

Cambridge University, U.K.
BA *Mathematics*
1983

Certifications

Chartered Association of Certified Accountants
Certified Diploma in Accounting and Finance
1988

Years of experience

6 Client side
30+ Consulting

Presentations & Publications

Airport Business Magazine
Time to Reorganize – Why U.S. Airports Need to Adapt Their Organizations to Meet Industry Changes
August/September 2018

Airports Council International – North America, Business of Airports Conference
Workforce Efficiency and the Bottom Line
2018

American Public Transportation Association, Annual Meeting
Value for Money and its Application in U.K. Rail
2012

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Projects summary

	Project	Client	Year/Location	Role
Strategic Planning and Business Case Development	Link21 Business Case	BART	2020-ongoing Oakland, CA	Project Director (2020-22), now Advisor
	YVR Logistics Services Strategy	Vancouver Airport Authority	2023 Vancouver, BC	Advisor
	Development of Strategic Plan and Implementation Review	Raleigh Durham Airport Authority	2022-ongoing Morrisville, NC	Project Director
	Development of Strategic Plan	Greater Asheville Regional Airport Authority	2022-ongoing Asheville, NC	Project Director
	LAWA Strategic Plan Development and Refresh	Los Angeles World Airports	2021-22, 2016-17 Los Angeles, CA	Project Manager
	LGB Organizational Plan and Action Plans	Long Beach Airport	2020-2022 Long Beach, CA	Project Manager
	Strategic Plan (Initial Development, and Update)	Port Houston	2019, 2014-15 Houston, TX	Project Director/ Manager
	SJC Strategic Plan	City of San Jose Airport Department	2015-16 San Jose, CA	Project Manager
	CAA Strategic Plan	Connecticut Airport Authority	2015-16 Hartford, CT	Project Manager

	Project	Client	Year/Location	Role
Organizational Effectiveness	Aviation Workforce Staffing Analysis	Port of Seattle	2023-ongoing Seattle, WA	Project Manager
	Review of LAWA Management Organization Structure	Los Angeles World Airports	2019 Los Angeles, CA	Project Director/ Manager
	Organizational Efficiency and Effectiveness Review	Houston Airport System	2013-14 Houston, TX	Project Manager
	Rail Value for Money Study – Analysis of Cost Drivers and Framework for Reducing Government Subsidy	Department for Transport and Office of Rail Regulator	2010-11 London, U.K.	Project Director
	Internal Consulting and Business Performance Improvement	Network Rail	2003-09 London, U.K.	Head of Strategic Analysis, then Head of Analysis & Reform

	Project	Client	Year/Location	Role
Governance and Transaction Advisory	Governance Review and Transition Planning	Hawaii Department of Transportation	2016-17 Honolulu, HI	Project Manager

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Dr. Stephen D. Van Beek

Director

Dr. Stephen D. Van Beek ("Steve") leads North American Aviation at Steer and has over 20 years of experience directing business planning and policy/regulatory projects for airports, trade associations, and government agencies.

Steve's strategic planning work with airport executives and boards includes airports ranging from non-hubs to large international gateway airports (e.g., Los Angeles, Boston, Denver, Greenville-Spartanburg, Hartford, Tucson, Phoenix – Sky Harbor, Greenville-Spartanburg, Hartford, Knoxville, and Lehigh Valley). These projects vary but include the facilitation and development of strategic plans and advice on Landside Access and Smart Parking; setting performance metrics to guide progress against the plans; and advising on enabling initiatives to support the plans across the airports' lines of business.

Prior to Steer, Steve was Vice President for ICF International, where he was seconded as an Interim Head of Economics for Airports Council International from 2015 and 2016. Steve was also President/CEO of the Eno Transportation Foundation and Executive Vice President of Airports Council International, North America. Prior to his association service, Steve was Associate Deputy Secretary in the U.S. Department of Transportation and Head of Intermodalism. His international experience also includes his service as a Senior Transport Advisor to the North Atlantic Treaty Organization in Brussels.

Relevant skills

Strategic Planning: Steve has advised on the development of strategic plans and associated action plans for many U.S. airports, including at Boston, Greenville-Spartanburg, Raleigh-Durham, Knoxville, Hartford, Long Beach, and Denver.

Non-Aeronautical Revenues: Steve has led over a dozen projects, helping airports increase their revenues, including with airport concessions, parking, and leveraging of land owned by airport authorities.

Airport Transactions: Steve has worked on several privatizations, public private partnerships, and Value for Money projects including in New York John F. Kennedy International Airport's The New Terminal One, Westchester, San Juan, and Bermuda.

Policy and Regulatory: Steve has extensive experience working with the International Civil Aviation Organization, the U.S. Department of Transportation, and the U.S. Federal Aviation Administration with regulations and policies concerning airport privatization, public private partnerships, capital investments, rates and charges, security, and congestion management.

Qualifications

University of Virginia
PhD, Government & Foreign Affairs
1991

University of Virginia
MA Government & Foreign Affairs
1988

University of California, Santa Barbara
BA Political Science
1983

Appointments

North Atlantic Treaty Organization (Brussels)
Senior Transport Advisor

Federal Aviation Administration, Management Advisory Council
Member

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Projects summary

Project	Client	Year/Location	Role
Aviation Governance and Traffic Study	Confidential	2021-ongoing Canada	Peer Review
Transformative Capital Plan	Greater Toronto Airports Authority	2021-ongoing Ontario, Canada	Project Director
Air Service to Small Communities	American Association of Airport Executives	2018 Washington, D.C.	Project Director
Port of Portland Economic Impact Analysis	Port of Portland	2022-ongoing Portland, OR	Project Director
Congestion Management	San Francisco International Airport	2010-ongoing San Francisco, CA	Project Lead
Strategic Planning	Tucson Airport Authority	2021-ongoing Tucson, AZ	Project Director
Strategic Plan Review	Massachusetts Port Authority	2018 Boston, MA	Project Director
Development of Strategic Plan and Implementation Review	Raleigh Durham Airport Authority	2022-ongoing Morrisville, NC	Project Director
Strategic Planning	Metropolitan Knoxville Airport Authority	2020-ongoing Knoxville, TN	Project Manager
Strategic Planning	San Diego County Regional Airport Authority	2020-ongoing San Diego, CA	Project Manager

Julia Wean, TDM-CP

Associate

I am a transportation planner with ten years' experience, with a focus on working in strategic planning and implementation of mobility strategies aimed at reducing vehicle miles traveled. I have worked with both public and private partners to advance regional transportation goals, promote alternative transportation solutions and demonstrate the impacts of their actions. I am passionate about helping our clients identify clear goals and objectives around which to design strategies, programs, or projects. I am an experienced project manager and work well with interdisciplinary teams to deliver client work.

Relevant skills

Transportation Demand Management: Julia has experience with both strategic planning and implementation of TDM programs and strategies throughout North America. She has developed and managed programming at the regional, municipal and site-levels, ensuring programs are tailored to unique audiences and scenarios. Her work focuses on TDM strategy, which requires a keen understanding of regional and local markets, policy levers and individualized barriers and motivations for non-single occupancy vehicle travel.

Transit Planning: Julia has experience supporting an AM/PM commuter bus system with five routes and nine vehicles. She analyzed passenger count trends, constructed a driver evaluation program, and maintained communication with both vendors and passengers. She provided support with route planning and other day to day operations.

Governance and Policy: Mobility decisions rarely impact just one audience or population, and Julia is passionate about consensus building and identifying evidence-based solutions that support shared goals. She recently led the development of C/CAG's Measure M Strategic Plan, which dictates both funding allocation and program direction for the 21 jurisdictions in San Mateo County, along with four unique and distinct countywide programs.

Business Case, Strategy and Evaluation: Through her work in TDM Julia has become passionate about helping her clients justify the existence of mobility programs through a combination of improved data collection and the use of TDM impact models that calculate reduction in vehicle miles traveled. She is currently leading SCAG's Future Communities Pilot Project evaluation, where the Steer team oversees the data collection and analysis of eight unique projects throughout the region aimed at reducing VMT.

Outreach and Engagement: Julia has community engagement experience through the development and delivery of projects and TDM programs. She has managed public outreach through email, web, social media and real-time transit platforms and organized and coordinated with multiple agencies to promote state-wide annual events centered around active transportation with participation of over 2,500.

Qualifications

University of Southern California
Master of Planning, Transportation Concentration, Real Estate Development Certificate
2017

University of Pittsburgh
BA Urban Studies
2011

Professional memberships

Association for Commuter Transportation

40 Under 40 Recipient, 2019

TMA Council Chair

Years of experience

6 Years Consulting
3 Years Nonprofit
1 Year Public Sector

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Selected projects summary

	Project	Client	Year/Location	Role
Transportation Planning	New Brunswick NJT Market Analysis	New Jersey Transit (sub)	2021-2022, New Brunswick, NJ	Strategic Advisor
	Richmond-San Rafael Bridge E-Bike Incentive Distribution Program	Metropolitan Transportation Commission (MTC)	2020-present, Bay Area, CA	Project Director
	Congestion Reduction Plan Authorization Update	City/County Association of Govts. (C/CAG)	2022-present, San Mateo, CA	Project Manager
Business Case, Strategy and Evaluation	Regional Mapping and Wayfinding Business Case	Metropolitan Transportation Commission (MTC)	2020-2021 San Francisco, CA	Project Manager
	C/CAG Measure M Strategic Plan	C/CAG	2020-present, San Mateo, CA	Project Manager
	Future Communities Pilot Program Evaluation	SCAG	2019-present, Los Angeles, CA	Project Manager
	Menlo Park and Foster City TMA Feasibility Studies	Cities of Menlo Park and Foster City	2019-present Menlo Park, CA Foster City, CA	Project Manager
	SACOG TMA Business Planning and Regional TDM Guidance	SACOG	2018-2019 Sacramento, CA	Project Manager
Transportation Demand Management	CATMA Strategic Plan	Chittenden Area TMA	2022- present Burlington, VT	Project Director
	Regional Mobility Policy Update	Oregon Metro	2020-present, Portland, OR	Project Director
	Honolulu TDM Plan	City/County of Honolulu	2020-present, Honolulu, HI	Project Manager
	goDCgo Commute Program Management	District Dept. of Transportation	2020-present, Washington, DC	Project Director
	Napa Valley Forward Program Design and Implementation	Metropolitan Transportation Commission (MTC)	2019-present, Napa Valley, CA	Project Director
	San Mateo TDM Plans (multiple)	City of San Mateo and developers	2019-present San Mateo, CA	Project Director
	SCAG TDM Strategic Plan	SCAG	2018-2019 Los Angeles, CA	Project Manager

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Michael Snavely

Associate Director

Based in Northern California, Michael brings 18 years of experience in transportation policy and strategic planning, including expertise in transit and rail planning; multimodal corridor planning and programming, system and corridor performance evaluation, scenario planning, and strategic visioning. Michael brings expertise in policy development, stakeholder coordination and strategic planning to translate complex analysis and policy constraints into actionable insights and tradeoffs for agencies at the local, regional, and statewide levels.

Qualifications

University of Michigan
MPP Public Policy
2008

Miami University
BA Diplomacy & Foreign Affairs
2003

Years of experience

18

Michael's experience includes management and oversight of policy and strategic planning projects such as the Caltrans California Transportation Plan 2050; the Oregon Statewide Transportation Strategy; LA Metro Mobility Matrices for South Bay Cities, North County, Gateway Cities, and San Gabriel Valley; the Metro Long Range Transportation Plan, including development of the initial Equity Focus Communities (EFCs) framework; and the LA Metro Gateway Cities Strategic Transportation Plan. He has led large-scale policy and analytics projects for other agencies including Caltrans, SCAG, BART, SANDAG, and the State DOTs of California, Nevada, Hawaii, Oregon, and Washington. He has led or contributed to multimodal corridor strategic planning efforts for SCAG (I-105), Metro (I-405, I-710), and SANDAG (I-8).

Relevant skills

Performance and Business Case Evaluation: Mike is an expert in multimodal and transit performance evaluation, business case analysis and development, and strategic prioritization and programming. For Metro, he developed a quantitative and qualitative processes to prioritize proposed transit and highway projects for consideration in Measure M, approved by voters in 2016. For BART, he is the Evaluation Lead for the Link21 study, tasked with developing a business case for a new transbay connection to the San Francisco Bay Area's commuter rail and heavy rail systems. He has led complex performance evaluation efforts for the California High-Speed Rail Authority, BART, Caltrans, SCAG, SANDAG, Metro, and other agencies across the Western U.S.

Scenario Analysis and Regional Strategic Planning: Mike uses ridership and revenue forecasts, survey analysis, big data analytics and more to design and implement scenario analyses that respond to stakeholders while advancing agency strategy. Scenario analysis is particularly critical when planning in an environment of high uncertainty. Mike has helped agencies such as LA Metro, Caltrans, and the Hawaii Department of Transportation develop scenario planning frameworks that employ robust decision-making to propose strategies for navigating COVID-19 recovery and other challenges to agency long-range transportation planning.

Transit & Rail Planning: Mike has partnered with state agencies, metropolitan planning organizations, and transit agencies developing complex rail and transit planning studies. He has supported state rail plans, corridor studies, and regional travel market analyses to inform broader bus transit and rail planning strategies. He designs decision support frameworks for major investments that build upon agency and stakeholder goals and objectives and leverage a range of qualitative and quantitative analytical tools and data to support operational, investment, and policy decisions.

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Projects Summary

	Project	Client	Year/Location	Role
Multimodal Corridor Planning	I-8 Comprehensive Multimodal Corridor Plan	SANDAG	2023, San Diego	Performance Evaluation Lead
	Metro I-405 Comprehensive Multimodal Corridor Plan	LA Metro	2022, LA	Principal-in-Charge
	East LA to Long Beach Corridor Plan	LA Metro	2022, LA	Strategic Advisor
	SCAG I-105 Corridor Sustainability Study	SCAG	2018, LA	Principal-in-Charge
Performance & Business Case Evaluation	Link21 Transbay Crossing Business Case Evaluation	BART/CCJPA	2022-23, Bay Area	Project Director
	BART Performance Management Framework	BART	2020, Oakland	Senior Advisor
	Metro Rail Network Integration Plan	LA Metro	2023, LA	Performance Evaluation Lead
	Metro Bike Models	LA Metro	2019, LA	Project Manager
	Measure M Project Prioritization	LA Metro	20216, LA	Project Manager
Strategic Planning	Metro Long Range Transportation Plan	LA Metro	2015-2020, LA	Project Manager
	California Transportation Plan 2050	Caltrans	2021, Sacramento	Project Manager
	One Nevada Implementation Plan	Nevada DOT	2020, Carson City	Senior Advisor
	Hawaii Statewide Transportation Plan 2045	Hawaii DOT	2022, Honolulu	Project Manager
	Washington Transportation Plan 2035	WSTC	2016, Olympia	Deputy Project Manager
	Oregon Statewide Transportation Strategy	Oregon DOT	2013, Salem	Deputy Project Manager
	Metro Active Transportation Strategic Plan	LA Metro	2022, LA	Performance Framework Lead
	California State Rail Plan	Caltrans	2018, Sacramento	Project Manager
	Metro Goods Movement Strategic Plan	LA Metro	2021, LA	Principal-in-Charge
	Metro Gateway Cities Strategic Transportation Plan	LA Metro	2016, LA	Deputy Project Manager
	Metro North County Mobility Matrix	LA Metro	2016, LA	Deputy Project Manager
	Metro San Gabriel Valley Mobility Matrix	LA Metro	2016, LA	Deputy Project Manager
	Metro South Bay Cities Mobility Matrix	LA Metro	2016, LA	Deputy Project Manager

Emily Alter

Equity + Inclusion Lead – North America, Associate

I bring a deep commitment to racial and social equity to my work in urban planning, land use, public infrastructure, and transportation planning. I use both qualitative and quantitative analytical methods, as well as robust community partnerships, to deliver sustainable projects and plans that respond to the needs of communities.

Relevant skills

Urban Planning: Emily has 12 years of experience in urban planning. In 2011, she wrote the City of San Pablo's first Climate Action Plan to reduce greenhouse gas emissions. She then worked for the City of El Cerrito, both as an analyst and as a consultant, on several long-range planning efforts, including as a sustainability expert on their Specific Plan to increase transit-oriented development and density; on an update to their Active Transportation Plan; as the project manager and author of the first Urban Greening and Economic Development Action Plans.

Policy Evaluation and Development: She served as the principal researcher on policy evaluations for the City of San Francisco's Planning Department, the Othering and Belonging Institute at UC Berkeley, and the San Francisco Housing Accelerator Fund. She designed and implemented original research programs to evaluate the impacts of land use, anti-displacement, and housing policies.

Racial and Social Equity Emerging Practices: Emily was Bay Area Rapid Transit's (BART) Manager of Title VI and Environmental Justice, where she worked interdepartmentally to expand regulatory compliance work to better address racial and social disparities. She served as Equity Manager for Link21, a project to build a new rail crossing of the San Francisco Bay, where she designed and implemented community co-creation strategies, revised the priority populations definition, and advised executive staff on how to embed equity in the project.

Sustainability and Environmental Justice: Emily works at the intersection of environmental sustainability, land use, transportation, and urban equity. Having developed greenhouse gas emissions inventories, climate action strategies, green infrastructure projects, and alternative transportation plans, and having served as the Environmental Justice Manager for the San Francisco Bay Area's largest transit operator, she brings her policy, planning, and analytical skills to design innovative, intersectional solutions to social and environmental issues.

Community Partnerships: Emily has 11 years of experience developing community partnerships, designing and implementing community engagement strategies, and serving as liaison on community boards, committees, and commissions. She believes strongly in the importance of community collaboration and input throughout planning, design, and development processes.

Management: Emily has managed several transportation and urban development plans, including State of California grant-funded projects, and served as the Bay Area Rapid Transit District's Manager of Title VI and Environmental Justice for two years. As an Associate at Steer, she manages Steer's Equity & Inclusion Practice for North America. She diligently manages project scopes and budgets, while inevitably ensuring that plans meet their stated goals and objectives.

Qualifications

University of California, Berkeley
Master's of Public Policy
2019

University of California, Berkeley
BA Urban Studies
2010

Professional memberships

Leadership in Energy and Environmental Design *Associated Professional*

Government Alliance on Race and Equity *Northern California Introductory Cohort Member*

Years of experience

9 Client side
2 Consulting

Presentations

Transportation Research Board *Conference on Advancing Transportation Equity: Equity Engagement on Link21*
2021

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Projects summary

	Project	Client	Year/Location	Role
Urban Planning	Urban Greening Plan	City of El Cerrito	2013-2015 El Cerrito, CA	Project Manager
	Active Transportation Plan	City of El Cerrito	2014-2015 El Cerrito, CA	Environmental Analyst
	San Pablo Avenue Specific Plan	City of El Cerrito	2013-2015 El Cerrito, CA	Community Development Analyst
	Project	**Client**	**Year/Location**	**Role**
Policy Evaluation and Development	Asset and Property Management Cost Evaluation	SF Housing Accelerator Fund	2019 San Francisco, CA	Principal Researcher
	Housing Production Impacts on Community Stabilization	Othering & Belonging Institute	2018-2019 Berkeley, CA	Housing and Social Equity Researcher
	Anti-Displacement and Community Stabilization Strategy	City of San Francisco	2018 San Francisco, CA	Principal Researcher
	Project	**Client**	**Year/Location**	**Role**
Racial and Social Equity Emerging Practices	Link21	BART	2020-2022 SF Bay Area, CA	Equity Manager
	Fare Equity Analysis of the 2022 Fare Increase	BART	2022 SF Bay Area, CA	Project Manager
	Parking Fee Equity Analysis Methodology	BART	2020-2022 SF Bay Area, CA	Project Manager
	Project	**Client**	**Year/Location**	**Role**
Sustainability and Environmental Justice	Transit Operations Facility Environmental Justice Analysis	BART	2019-2020 SF Bay Area, CA	Project Manager
	Climate Action Plan	City of San Pablo	2011-2012 San Pablo, CA	Project Manager

	Project	Client	Year/Location	Role
Community Partnerships	Link21 Co-Creation Workshops	BART	2020-2022 SF Bay Area, CA	Equity Manager
	Title VI and Environmental Justice Advisory Committee	BART	2019-2022 SF Bay Area, CA	Chair
	Limited English Proficiency Advisory Committee	BART	2019-2022 SF Bay Area, CA	Chair
	Economic Development Committee	City of El Cerrito	2014-2015 El Cerrito, CA	Chair

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Henry Kosch RPP, MCIP

Consultant

Henry is a transportation planner with experience in mobility policy research, data collection, analysis, decision-making framework development, project evaluation, and stakeholder engagement.

At Steer, he has supported a range of work involving policy development and strategic planning, including with equity considerations. This includes evaluating a new rail crossing in the San Francisco Bay by whether project concepts and alignment alternatives advance or challenge equity metrics. Henry also recently supported the assessment of potential financing tools and strategies for the California Air Resources Board. This was to determine the alignment that potential financing tools and strategies have with the ability to support sustainable mobility solutions for residents living in disadvantaged communities.

Prior to Steer, he worked for Canada's Federal Department of Transportation, Transport Canada, as a policy analyst where he researched transportation policy issues, conducted stakeholder outreach, and assessed how emerging issues may impact or align with departmental objectives.

Relevant skills

***Strategic Evaluation**:* With Steer, Henry has undertaken strategic evaluation for several projects, which have included producing cost-benefit analyses and processing multiple account evaluations. This included evaluating different options for modernizing TransLink's (Metro Vancouver) compass program, evaluating network options for an update to the City of Richmond's (Canada) cycling network, and supporting TransLink in developing criteria to assess non-transit investments.

Transportation Policy Research and Analysis: With Steer, Henry has demonstrated experience reviewing planning regulation, policy documents, legislation, data and geographic information to support clients. Recently, Henry supported the Environmental Screening Review for the Surrey-Langley Skytrain Project, which involved compiling a detailed summary of existing mobility conditions and policies in the area, and then analyzing the transportation and access implications for the arrival of the Skytrain project.

Conditions Assessment (Data Collection and Engagement): With Steer, Henry has undertaken conditions assessment for various projects. Recently, Henry supported freight indicators research for TransLink; understanding the trends in freight and deliveries movements across Metro Vancouver over the past decade. Henry also worked to assess the existing conditions, constraints, and weaknesses of freight movement in Manitoba, and how these may be impacted by a proposed railyard.

Economic Analysis: Henry has undertaken various types of economic analysis, including monetizing economic value of transportation investment and producing benefit cost/analyses for TransLink's compass program, and assessing the direct, indirect and induced economic impacts of the Port of Portland (Oregon).

Qualifications

University of British Columbia
Master of Community and Regional Planning (Transportation Planning and Land Economics)
2020

Simon Fraser University
Bachelor of Arts (Geography Honours, Economics Major)
2018

Chinese University of Hong Kong
Study Abroad
2014

Professional memberships

Canadian Institute of Planners
Certified Member

Years of experience

3.0 Client side
2.0+ Consulting

Awards

American Planning Association
Outstanding Planning Student Award
2020

Social Sciences and Humanities Research Council of Canada (SSHRC)
Joseph Armand Bombardier Canada Graduate Scholarship
2019

Transport Canada
Pacific Region Excellence Award
2017

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Steer Projects summary

	Project	Client	Year/Location	Role
Options Evaluation	Link21 Business Case	HNTB (Ult. Client: Bay Area Rapid Transit)	2022-ongoing Oakland, CA	Equity Evaluation Lead
	Compass Investment Business Case Consultant Services	TransLink	2022 Vancouver, BC	Analyst – Socio-Economic Benefit Cost Evaluation
	Sustainable Financing Tools and Strategies	California Air Resources Board	2022 Sacramento, CA	Analyst – Tools and Strategies Evaluation
	Richmond Cycling Network Update	City of Richmond	2021-2022 Richmond, BC	Analyst

	Project	Client	Year/Location	Role
Transportation Policy Research and Analysis	Fraser River Tunnel Project: Bike Planning Support	Binnie (Ult. Client: BC Ministry of Transport…)	2022-ongoing Vancouver, BC	Project Manager
	Sustainable Financing Tools and Strategies	California Air Resources Board	2022-2023 Sacramento, CA	Analyst – Tools and Strategies Identification and Review
	Surrey-Langley Skytrain Environmental Screening Review	Hatch	2021-ongoing Vancouver, BC	Analyst
	New Vision Implementation Support Services	TransLink	2021-2022 Vancouver, BC	Analyst

	Project	Client	Year/Location	Role
Conditions Assessment	Capstan Station Integration	Dialog (Ult. Client: City of Richmond)	2022-ongoing Richmond, BC	Project Manager
	Project Galaxy	Confidential	2023 Los Angeles, CA	Analyst
	CentrePort Logistics Centre Freight Study	Focus Equities	2022 Winnipeg, MB	Analyst
	Surrey-Langley Skytrain Environmental Screening Review	Hatch	2021-ongoing Vancouver, BC	Analyst

Erika Kulpa

Senior Consultant

I am an experienced Transportation Planner with an international career in the transportation planning industry in NGOs and the public and private sector. My work has been focused on transportation demand management (TDM), active transportation, road safety, complete streets design, social equity, community engagement, and visual communications related to mobility projects. My goal is to bring back people into the center of policies and projects and promote healthy and happy places where communities can thrive.

My experience as a planner and a visual communications designer provides me with a unique approach when developing projects as I understand the importance of catering strategies and the need for them to be accurately perceived and easily understood. Having a combination of soft and hard skills allows me to understand the communities I am serving and develop ideas and high-quality deliverables that relate to them.

Qualifications

University College London
MSc- Transport and City Planning (distinction) 2019

National Autonomous University of Mexico
B.S. Architecture 2012

Years of Experience

3 Consultancy
2 Government

5 Non-Profit

Languages

English: Fluent
Spanish: Native

Field of Specialization

Transportation Demand Management (TDM): Erika has collaborated on several TDM projects within the company. She is the Project Manager for a regional rail TDM pilot and has supported several other projects (Santa Monica, Sacramento, Culver City) on management, organization, research, marketing, and visual communications. She understands that to satisfy a transportation need, the focus should not only on the technical solutions, but on the people each plan serves. Erika has contributed to making TDM plans functional and appealing.

Policy and Design: Erika has a strong background in projects and policy design related to active transportation, complete streets, and road safety in Californian cities. Her professional experience includes coordinating and carrying out pedestrian and cyclist environment audits, concept design development for complete streets, and design guidelines for active transportation.

Visual Communications: Having and architecture background, Erika has developed strong skills in graphic design and data visualization. She creates digestible and appealing content that best communicates the essence, idea, and identity of any given project. Through the content she develops and curates, she creates an intrinsic connection between the final product and the community the project serves.

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Relevant Projects

	Project	Organization	Year/Location	Role
Transportation Demand Management	TDM Pilot (Regional Rail)	Confidential	2021-Present, California	Project Manager
	Culver City TDM Strategy	City of Culver City	2022 - Present, Culver City, CA	Planner
	Santa Monica TMO	City of Santa Monica	2022 - Present Santa Monica, CA	Graphic Designer
	Employer-Sponsored Transportation Benefits	City of Los Angeles	2021-Present Los Angeles, CA	Planner Graphic Designer
	Sacramento TDM Strategy	City of Sacramento	Aug 2023 – Present Sacramento, CA	Brand development
Policy, Planning, and Design	Equity Impact Assessment	Cintra	2023 USA, Canada	Planner
	Orange County Mobility Hubs Strategy	Orange County Transportation Authority	2022 Orange County	Planner, 3D Modeller and Document Designer
	Measure M	C/CAG San Mateo	2021-2022 San Mateo, CA	Planner Document Designer
	Government Street Concept Design	City of Vancouver	2021, Victoria, Canada	Concept Streets Designer
	Master Plan for Alberta Street	City of Vancouver	2021, Vancouver, Canada	Concept Streets Designer
Visual Communications	Fare Coordination & Integration Study	MTC	2021-2022 Bay Area, CA	Document Designer
	Rail Governance	MTC	2021-2022 Bay Area, CA	Document Designer
	Second Bay Crossing	Bay Area Rapid Transit	2022 – Present Bay Area, CA	Dashboard Designer
	NYC Livability	NYCDOT	2022 NYC, NY	3D Street Designer

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Rebecca Nelson

Senior Consultant

Rebecca has a background in transportation planning in Toronto. She is passionate about creating equitable transit solutions that will help residents reach their destinations accessibly and efficiently. With Steer, she focuses on equitable transportation policy and business case development to support the delivery of transit projects. Rebecca also has experience managing projects with complex client teams to ensure successful project delivery on time and budget.

Relevant skills

Transportation Planning and Business Case Development: Rebecca has a range of experience in strategic transportation planning and business case development, including setting strategic outcomes, overseeing modeling efforts, and report writing. She applies her experience from the public sector when working with clients seeking to implement better transportation solutions for residents in their region. The planning and business case documents Rebecca has worked on have helped to advance the region's transit priorities, including the evaluation of rapid transit projects to get them closer to delivery.

Data Visualization: Rebecca has comprehensive experience in data visualization working with varying municipal transportation systems, land uses, and population analyses. She uses this experience to illustrate spatial relationships to decision makers.

Active Transportation and Placemaking: Rebecca has experience in supporting the development of active transportation systems and wayfinding for municipalities. She has supported the development of active transportation networks in a secondary plan, and thinking planning wayfinding systems for different modes of travel.

Equity Planning and Community Engagement: Rebecca has worked with communities on several participatory research projects to improve access to transportation and active transit methods. Her focus has been on sharing circles and pedestrian audits to engage community participants with the goal of altering standard consultation principles to meet the needs of diverse populations. In these roles, Rebecca has acted as a facilitator to guide discussion and take different perspectives into consideration for the final project outcomes.

Qualifications

University of Toronto
MSc Urban Planning
2019

University of Ottawa
BA Environmental Studies
2016

Professional memberships

Ontario Professional Planners Institute
Registered Professional Planner (RPP),
Member

Years of experience

2 Consultancy

2 Public Sector
2 Academic

Employment history

2021 – Present
Steer Group
Consultant
Toronto, ON

2020 – 2021
Metrolinx
Advisor
Toronto, ON

2019 – 2020
Metrolinx
Intern
Toronto, ON

2018 (summer)
Metrolinx
Rob MacIsaac Research Fellow
Toronto, ON

Languages

English – Fluent
French – Conversational

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Projects summary

	Project	Client	Year/Location	Role
Business Case Development	Business Case Templates and Guidance	Metrolinx	2023-present Toronto, ON Canada	Project Manager
	Yorkdale GO Bus Terminal Initial Business Case	Metrolinx	2023-present Toronto, ON Canada	Strategic Case Lead
	Ontario Line Full Business Case	Metrolinx	2023-present Toronto, ON Canada	Project Manager
	MTC Rail Governance	Metropolitan Transportation Commission (MTC)	2022-2023 Bay Area, CA United States	Project Manager
	Scenario Planning	Metrolinx	2022-2023 Toronto, ON Canada	Project Manager and Technical Support
	Dundas BRT Routing and Service Plan Mini Business Case	Metrolinx	2022 Toronto, ON Canada	Project Manager and Technical Support
	California Integrated Bus Study	Caltrans	2021-2023 California United States	Project Manager and Technical Support
	Regional Fare Structure Business Case	Metrolinx	2021-2022 Toronto, ON Canada	Deputy Project Manager

	Project	Client	Year/Location	Role
Equity Planning and Community Engagement	Cintra Equity Impact Assessment Case Studies	Cintra	2023 Austin, TX United States	Canadian Research Lead

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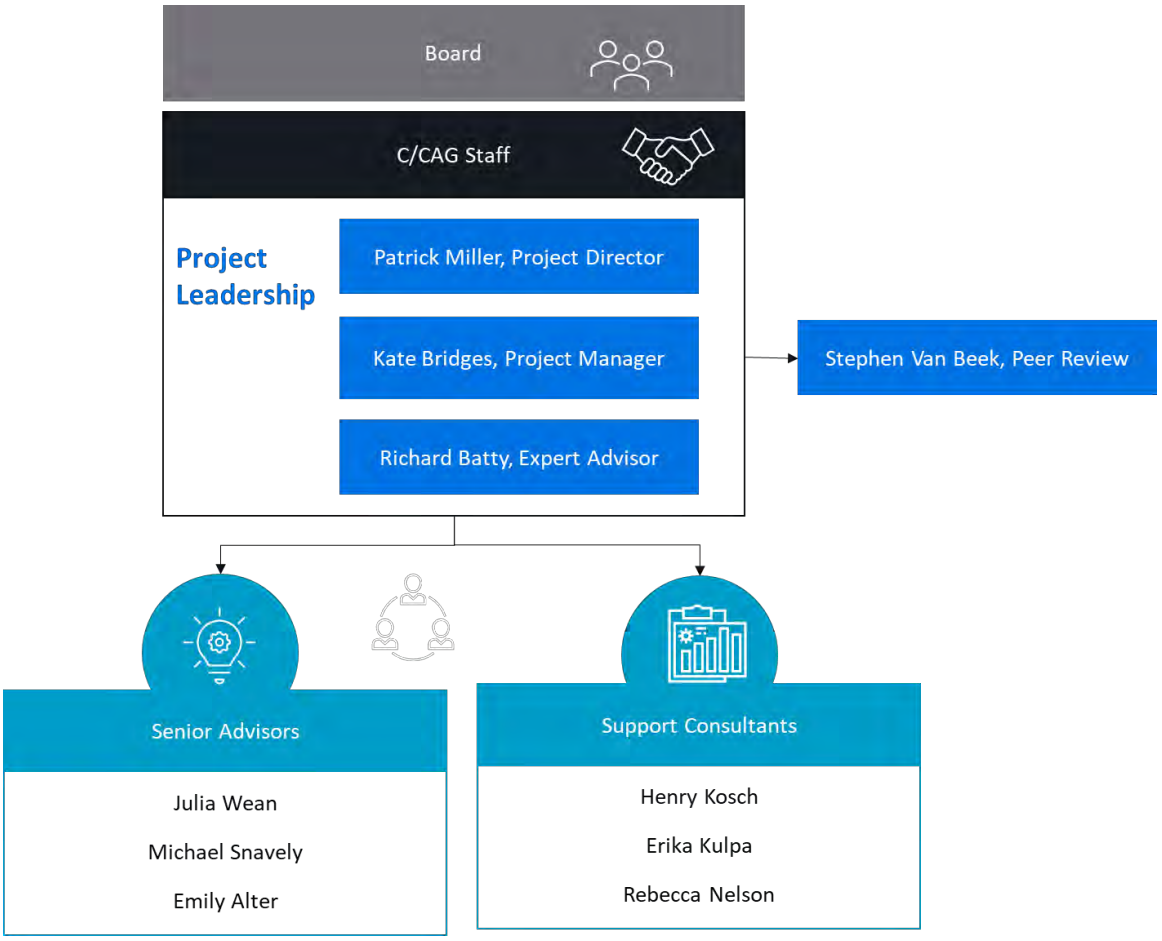
A1.4 Organization Chart

The following organization chart presents the structure of our team. We have organized our staff into four themes, including:

- **Project Leadership** – as described in the previous section, our leadership team will include consultants experienced in developing Strategic Plans for public agencies who will oversee all activities and provide peer review and quality assurance.
- **Senior Advisors** – We have included locally-based senior advisors to aid in engagement and prioritization as well as individuals with relevant experience working with the C/CAG leadership and staff team previously.
- **Support Consultants** – We have also included three team members experienced in strategic policy development and implementation plans for major public agencies in the U.S and Canada to aid in background work.

Figure 3.1 Organization Chart



A1.5 Work Samples

The following section describes the Steer team's previous experience developing strategic planning documents for public agencies in North America. We have provided five project qualifications, which showcase our work helping public agencies, including C/CAG, navigate the executive level decision-making process and deliver successful strategies for the near and long-term. We have also included relevant work samples for the Long Beach Airport (published brochure version) and the C/CAG Measure M Implementation Plan.

Project Name	LGB Organizational Plan and Action Plans
Client	Long Beach Airport (Long Beach, CA)
Cost	Organizational Plan $99,750, Action Plan $76,000
Description / Summary Statement Clarifying Relevance	Steer undertook a rapid assessment of organizational effectiveness for Long Beach Airport and identified the need for organizational realignment and a plan to provide a clear direction and common priorities for the staff. We then worked with a team of LGB managers and staff to develop a comprehensive strategic plan (the "Organizational Plan") including mission, vision, core values, goals, objectives, and performance measures. Building on LGB's rich heritage and attractive facilities, the Plan charts a path to a unique customer experience, delivered responsibly by an engaged workforce in partnership with the community. Steer then worked with cross-functional LGB teams to define action plans for implementation.
Reference	Cynthia Guidry, Director, Long Beach Airport, Cynthia.Guidry@longbeach.gov, (562) 570-2605
Date	2020 - 2021
Description of Proponent Role	• Organizational plan activities included interviews with officers and deputy officers and other senior staff, development of a plan development team, situation analysis and briefings and a series of virtual workshops (using Miro) to develop the Mission, Vision, Core Values, Goals and Performance Measures. • Action planning activities included a series of virtual and in-person workshops with team of LGB delegates from across the organization to agree on key actions to support goals determined in Phase I and review and refine the plans. **Work Sample Included – The original Organization and Actions Plans are not publicly available; however we have included a PDF of the booklet that was generated by LGB to summaries the core elements of the Organizational Plan.**
Key Personnel and Role	Project Manager: Richard Batty, Project Director: Steve Van Beek, Project Team: Kate Bridges

Project Name	Measure M 5-Year Strategy
Client	**City/County Association of Governments of San Mateo County**
Cost	$160,000 USD
Description / Summary Statement Clarifying Relevance	Steer supported the City/County Association of Governments of San Mateo County in developing a program funding plan for the next five years, with a focus on fostering innovation and demonstrating programmatic impacts for a ballot measure initiative. As part of this effort, Steer was commissioned to develop a Strategic Plan and 5-year Implementation Plan for the Measure M program, which involves a $10 vehicle registration fee assessed to car owners in San Mateo County. Steer has also been commissioned to provide ongoing guidance to C/CAG during the implementation of the Strategic Plan recommendations.
Reference	Kim Wever, Transportation Program Specialist City/County Association of Governments (C/CAG) kwever@smcgov.org | 650-599-1451
Date	2020-2021
Description of Proponent Role	Steer collaborated with the City/County Association of Governments of San Mateo County to develop a program funding plan for the next five years. This involved the following activities: • Undertaking a comprehensive review of the current Measure M program, including financials and metrics achieved, to identify strengths and challenges. • Conducting extensive stakeholder outreach via surveys and follow-up interviews to understand from funding recipients which elements of the Measure M program worked well, and which might need review. • Researching similar fee and tax programs to identify best practices from across North America. • Presenting key findings and conducting workshops with C/CAG's Congestion Management Program Technical Advisory Committee (TAC), Congestion Management and Environmental Quality Committee (CMEQ), and Board of Directors to collaboratively develop guiding principles, objectives, and key performance indicators (KPIs) for post-implementation evaluation. • Supporting implementation of recommended strategies by developing program metric reporting forms, defining an innovative pilot program, and guiding the creation of an online program dashboard (in progress). **Work Sample Included.**
Key Personnel	Project Manager: Julia Wean, Project Director: Patrick Miller

Project Name	Scenario Planning for Decision Making
Client	**Metrolinx (Greater Toronto and Hamilton Area (GTHA), ON)**
Cost	$25,000 CAD
Description / Summary Statement Clarifying Relevance	Steer collaborated with Metrolinx to develop high-level scenarios for business case analysis in the Scenario Planning project. The aim was to expand Metrolinx's capacity to apply scenario analysis on business cases, evaluating interventions in the multimodal transportation network. Steer, along with Metrolinx, a peer review panel, and a local working group, developed a decision-making framework that draws upon local and wider practices. Steer delivered key reports and engaged in discussions, workshops, and data analysis.
Reference	Matt Routley, Manager Metrolinx, Research and Planning Analytics Matt.Routley@metrolinx.com | 416-202-3048
Date	2021-2022
Description of Proponent Role	Steer worked collaboratively with Metrolinx to support the Scenario Planning project in developing and implementing scenario planning practices for their business cases. This involved the following activities: • Collaborating with Metrolinx to identify high-level scenarios for business case analysis. • Developing a five-sprint process to identify and apply scenarios. • Expanding the definition of core scenarios for future business cases. • Assisting Metrolinx in applying scenario analysis on business cases. • Delivering three main deliverables: Scenario Definition Report, Scenario Analysis Manual, and Final Report and Data. • Engaging in discussions with the client and analyzing census data to inform scenario development. • Conducting workshops with Metrolinx's economics and modelling team to translate core scenarios into best practices. • Providing pilot data for scenario testing by Metrolinx. • Outlining next steps to incorporate scenarios into business case work.
Key Personnel	Project Manager: Rebecca Nelson, Project Director: Patrick Miller

Project Name	Metrolink Strategic Business Plan
Client	**Metrolink/InfraStrategies**
Cost	$265,000
Description / Summary Statement Clarifying Relevance	Steer collaborated with a consultant team to develop Metrolink's Strategic Business Plan, with a focus on doubling ridership within five years. The plan aimed to establish a framework to achieve these ambitious goals, taking into account the Southern California Optimized Rail Expansion (SCORE) Program and its impact on Metrolink's expanded role in the region. The project showcased Steer's capability in comprehensive analysis, stakeholder engagement, and strategic improvements to drive ambitious transportation goals.
Reference	Roderick Diaz, Director Planning & Development DiazR@scrra.net | 213-452-0455
Date	2020 - 2021
Description of Proponent Role	Steer played a crucial role in the development of Metrolink's Strategic Business Plan. The team provided expertise in financial analysis, market analysis, and scenario planning. The Strategic Business Plan development included: • Conducting a comprehensive analysis of Metrolink's historical operations, financial performance, and investment patterns. • Utilizing regional travel demand models and ridership data for market analysis. • Conducting market analysis to gain insights into existing customers and potential markets. • Assessing future scenarios and strategies through ridership and revenue modeling. • Considering factors such as capital improvements, policies, amenities, station access, parking, and transportation demand management plans. • Facilitating stakeholder engagement throughout the project to gather input and support for the plan. • Effective collaboration and development of strategic frameworks.
Key Personnel	Project Manager: Iain Conway, Project Director: Patrick Miller

Project Name	GO Bus 10-Year Bus Strategy
Client	**Metrolinx (Toronto, CAN)**
Scope	$180,000 CAD
Description / Summary Statement Clarifying Relevance	The GO Bus 10-Year Bus Strategy project was a collaboration between Steer and Metrolinx to establish a guiding direction for Metrolinx's GO Bus operations in the next ten years. The project involved the development of business case analysis and a Metrolinx endorsed business case-style report to the level of a PDBC. The project included transportation policy analysis, stakeholder engagement sessions, and assessment of strategic, economic, and financial costs and benefits informed by transportation forecasting and modelling.
Reference	Doug Spooner, Director Metrolinx, Service Planning Doug.spooner@metrolinx.com | 416-202-3923
Date	2019-2020
Description of Proponent Role	Steer played a crucial role in supporting Metrolinx's Service Planning division in developing the GO Bus 10-Year Bus Strategy. The team provided expertise in transportation policy analysis, transportation forecasting and modelling, stakeholder engagement, and business case development. The project included: • Developing a clear direction for GO Bus service, which will inform strategies related to fleet management, enhancing customer experience, improving infrastructure, setting fares, and optimizing service delivery. • Conducting transportation forecasting and modelling to assess the relative performance of a series of network concepts. • Assessing strategic, economic, and financial costs and benefits of different scenarios for how GO Bus could operate in the future. • Engaging with key stakeholders from across Metrolinx's relevant departments as well as with individual Municipal Service Provider (MSP) representatives to ensure that the strategy was aligned to strategic priorities and concurrent strategic planning work being undertaken. • Developing a Metrolinx endorsed business case-style report to the level of a Preliminary Design Business Case (PDBC) that contains Business Case-style analysis that informs the identification of a north star direction for GO Bus service.
Key Personnel	Project Director: Patrick Miller

Modernizing Measure M

Implementation Plan and Strategic Guidance

Fiscal Years 2021/22 to 2025/26

C/CAG
City/County Association of Governments
of San Mateo County

Modernizing Measure M

Implementation Plan and Strategic Guidance

Fiscal Years 2021/22 to 2025/26

Prepared by:

Steer
800 Wilshire Blvd, Suite 1320,
Los Angeles, CA 90017
USA

+1 (213) 425 0990
www.steergroup.com

Prepared for:

City/County Association of Governments
555 County Center, 5th Floor
Redwood City, CA 94063

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Appendices

A. Measure M Performance Assessment

B. Best Practice Review

0

Executive Summary

Executive Summary

The Measure M program was approved by San Mateo County voters in 2010 to support local transportation projects and programs aimed at maintaining safe and clean roads, reducing congestion, and improving air quality.

The **Strategy** section of the Plan outlines goals, objectives, and formal recommendations to modernize the Measure M program through its next five years of operation. The Plan also includes an updated **Implementation Plan**, which lists the allocation percentages for funding recipients, and provides specific guidance on eligibility, and performance measures.

Methodology

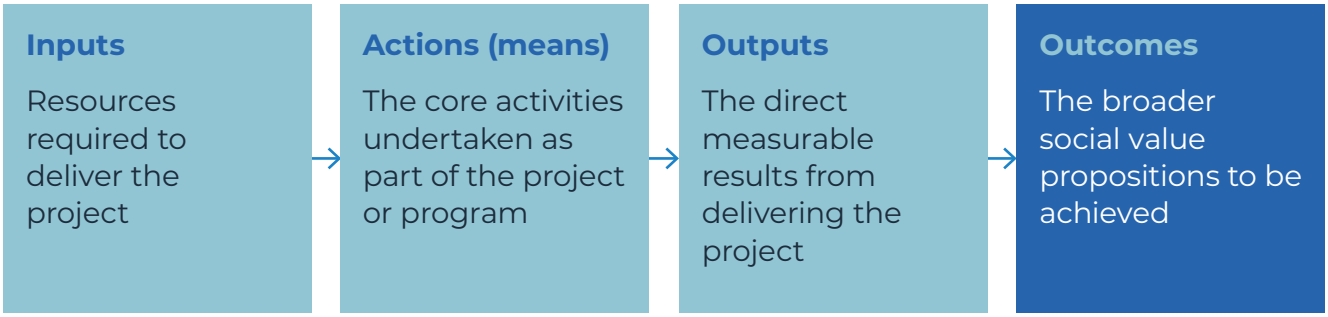
Development of the Measure M Strategic and Implementation Plan began with a comprehensive performance assessment of the current program; followed with forward planning, and goal setting with program partners and stakeholders; and finally concluded with a review of best practices nationwide. The Plan development process is described in more detail below:

Performance Assessment
The performance assessment included stakeholder input through interviews and a survey of each jurisdiction, as well as a detailed review of allocation and expenditure data for each Measure M funded program from inception to Fiscal Year 2019/20. The analysis found that flexibility for funding recipients and the ability to use Measure M to leverage additional funding are strengths of the program. The assessment also found that the program could benefit from standardized data collection practices to aid in future planning exercises and evaluation of program impacts.

Goal and Objective Setting
Stakeholder discussions and a representative group of funding recipients helped to set goals and objectives for the Measure M program. Each program established goals that are demonstrated through a Logic Framework, outlining the inputs, actions, outputs, and outcomes that should be achieved in the Fiscal Years 2021/22-2025/26 Implementation Plan period. The Logic Framework model is a useful tool to guide planning and support funding recipients in collecting data that can be used to clearly indicate success and identify challenges for consideration in future plans.

Best Practices
The Plan also benefited from lessons learned from local and national agencies whose programs were studied through a best practices review. The review provided guidance for innovation and efficient program delivery that can be adopted by C/CAG and Measure M funding recipients.

Figure 0-1. Logic Framework



Strategic Plan Outcome

Vision

The Plan provides recommendations for the Measure M program and its funding recipients to be implemented in the next five years. Recommendations aim to further the "Modernizing Measure M" Vision Statement, which was developed through program review and discussions with C/CAG staff, stakeholders, and partners:

To improve mobility and reduce water pollution in San Mateo County through flexible, innovative, efficient, insight-driven and accountable program delivery.

Recommendations

The Vision Statement is pillared by five Guiding Principles, which frame each of the recommendations. Recommendations have been set for Measure M, targeting program administration, programming, evaluation, and funding allocation.

Guiding principles:

Flexible Planning

- Continued flexibility in approved funding uses
- Expand fund usage guidance for Local Streets and Roads recipients

Accountable Monitoring and Evaluation

- Require annual reporting through streamlined template
- Publish online dashboard to communicate program information

Innovative Programming

- Repurpose unused admin funds for innovative Countywide Program pilots
- Encourage innovation among Countywide Program operators
- Support knowledge sharing across funding recipients

Insight-driven Decision Making

- Standardize evaluation framework for each funding recipient
- Review countywide program allocation based on updated need
- Develop longer term structure that considers impact in allocation decisions

Efficient Operation

- Transition to online reporting
- Streamline back-end budget systems

Allocation and Action Plans

The Modernizing Measure M Plan outlines a set of recommendations, actions and targets for each of the programs receiving Measure M funding. This set of actions is intended to guide planning, evaluation, and future decision making in support of an impactful and effective program.

The Local Streets and Roads allocation is recommended to stay the same at 50% of the net Measure M revenues. The allocation between local jurisdictions is recommended to continue utilizing a distribution formula consisting of 50% population and 50% road miles for each jurisdiction. The formula is modified to guarantee each jurisdiction a minimum amount of $75,000.

The Countywide Programs allocation is recommended to be revised using guidance from a needs-based allocation model, which considers a quantitative review of historic revenue to identify how valuable Measure M is within each program's overall funding situations, and a qualitative look at future risk and programmatic need. This is the first step towards building a comprehensive allocation framework. As C/CAG collects more programmatic data and performance metrics, the goal is to add an impact-based component to the next framework to enable successful and impactful funding distribution.

The recommended Countywide Program allocation distribution are outlined in **Table 0-1**.

Next Steps and Strategic Plan Use

C/CAG will use the recommended actions outlined in the Strategic and Implementation Plan to continue improving the Measure M program and its operation. Funding recipients will use the Implementation Plan to identify their programs' funding allocations, confirm allowable uses for their funding, and report on progress toward their stated goals and objectives.

Table 0-1. Countywide Program Funding Allocation Recommendations

Countywide Program	FY 2010/11-2020/21 Allocation	FY 2021/22-2025/26 Allocation
Transit Operations/ Senior Mobility	22%	18%
Technology/ Smart Corridor	10%	11%
Safe Routes to School	6%	6%
Stormwater(NPDES/MRP)	12%	15%

1 Introduction

Strategic and Implementation Plan Purpose

The Measure M program was approved by San Mateo County voters in 2010 to support local transportation projects and programs aimed at maintaining safe and clean roads, reducing congestion, and improving air quality. Measure M imposes an annual fee of $10 on motor vehicles registered in San Mateo County. It is estimated that over $6.7 million in revenues would be collected annually and $167 million total over the 25-year period between May 2011 and May 2036. Every five years, City/County Association of Governments of San Mateo County (hereafter referred to as 'C/CAG') develops a 5-Year Implementation Plan, to be approved by the C/CAG Board. The Implementation Plan designates approved projects and programs to receive Measure M funding throughout the next 5-year period. The most recent Implementation Plan was published in May 2016 for the Fiscal Years 2016/17-2020/21 period. C/CAG determined the need to develop a Strategic and Implementation Plan, covering Fiscal Years 2021/22-2025/26.

Steer has been commissioned by C/CAG to develop a current programs status report, identify program needs and priorities, make recommendations on resource needs and investment priorities, and outline performance measures that can indicate program progress, both on an annual basis and at the end of a five-year period. This Strategic and Implementation Plan is structured as follows:

Chapter 1

Introduction introduces Measure M and this Plan, in addition to describing the methodology and work completed to develop the Plan. This chapter further describes the concept of a Logic Framework and how it will be used to evaluate and support Measure M strategic planning moving forward.

Chapter 2

Strategy outlines strategies spanning five categories that are recommended for implementation over the next five years to improve the efficiency and impact of the Measure M Program. This chapter also discusses the process of reviewing the Countywide Transportation Program allocation distribution.

Chapter 3

Implementation Plan includes the Fiscal Years 2021/22-2025/26 five-Year Implementation Plan which outlines funding allocation and allowable uses for Measure M funds through the Local Streets and Roads program and Countywide Transportation Programs.

Chapter 4

Conclusion provides a high-level summary of key recommendations for the Measure M program over the next five years, through application of the Logic Framework.

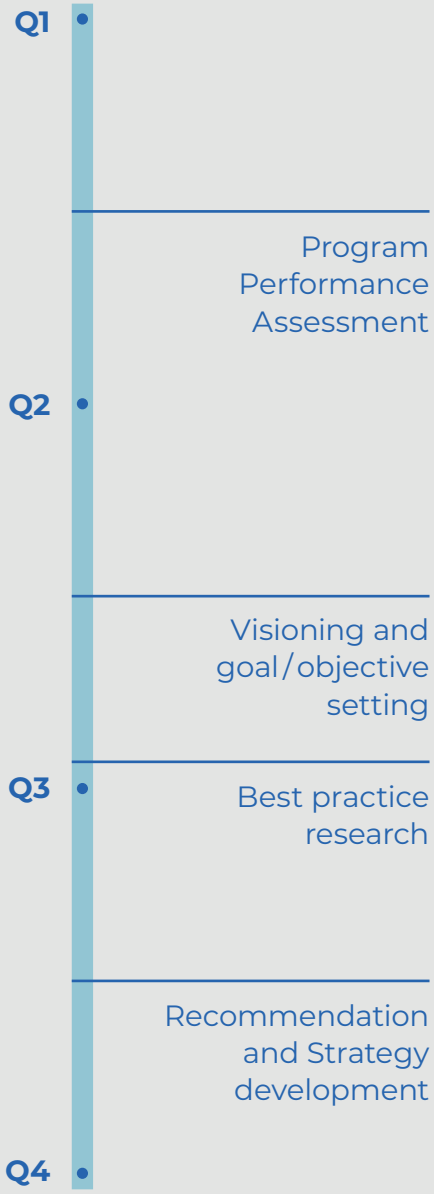
Plan Development

Overview

The project team, consisting of representatives from C/CAG and Steer, began work on the Plan in summer 2020.

The process began with a comprehensive review of the current Measure M program through a Performance Assessment (using data available up until October 2020). The findings are documented at Appendix A, **Performance Assessment Memorandum**. This process involved analyzing financial data and performance data from each funding recipient. Additionally, the team conducted extensive stakeholder outreach to understand from funding recipients which elements of the Measure M program worked well, and which might need to be reviewed. This was done through a survey completed by all Local Streets and Roads funding recipients, follow up interviews with some jurisdictions, individual interviews with Countywide Transportation Program managers, and presentations and receipt of feedback from C/CAG's Congestion Management Program Technical Advisory Committee (TAC), Congestion Management and Environmental Quality Committee (CMEQ) and Board of Directors. There are a total of six key findings, with the first three indicating program strengths and the second three indicating gaps or challenges.

Figure 1-1. Measure M Strategic Plan Project Timeline



Main themes:

1. **Funding flexibility** allows program managers to adapt to changing circumstances and needs. It allows program managers to put Measure M funds toward their most effective use on a year by year basis.

2. Measure M funding **supports the intended outcomes/goals of each program**, while there are opportunities to expand impact over the next five years.

3. Measure M funding **creates opportunities** that can unlock or be combined with other funding sources to enable larger projects and programs.

4. **Standardizing performance indicators** would more comprehensively demonstrate value of the Measure M program to the public.

5. **Data management practices** could improve to better trace the impact of Measure M funding.

6. **Reporting and invoicing processes** could be augmented to support timely data collection and demonstration of impact.

These themes were used as the basis for the development of the Strategic and Implementation Plan.

Following the initial Performance Assessment, the project team and Measure M stakeholders set goals, objectives and key performance indicators (KPIs) to support program planning and future post implementation evaluation. The Vision and Goals Memorandum identified vision, goals and objectives for Measure M. The results of that memo are outlined in the chapters below.

The project team then undertook a case study review of county-level funding programs across North America to gain knowledge on their implementation and allocation strategies. The team applied a 'lessons learned' approach to provide relevant recommendations for the Measure M program. The Best Practices Memorandum is attached in Appendix B.

Vision and Guiding Principles

The Vision Statement was developed to guide the development of the Strategic and Implementation Plan. This vision was used to develop goals (described in the following narrative), and to structure the recommendations contained within this Plan. This statement has been developed throughout the course of the project and agreed between the project team and Measure M stakeholders.

Modernizing Measure M vision:

To improve mobility and reduce water pollution in San Mateo County through flexible, innovative, efficient, insight-driven and accountable program delivery.

After multiple workshops with the project team and Measure M stakeholders, as well as presentations to C/CAG Board and Committees, the following emerged as guiding principles that have shaped the strategic recommendations. “Modernizing Measure M” means continued and expanded:

- Flexible planning
- Innovative programming
- Efficient operation
- Monitoring and evaluation, and
- Insight-driven decision making

Goals; Objectives; Performance Measures

In the context of Measure M, a goal is defined as the aspirational direction(s) for a project program or policy, which are set at the onset of a strategy to guide its development. The goals developed for the Measure M Strategic and Implementation Plan represent intangible and non-measurable intents of the Measure M program overall. Each goal is tied to one of its designated funds-receiving programs as outlined in **Table 1-1**.

Table 1-1. Goal for each Measure M Program

Measure M Program	Goal
Administration	Support vehicle registration fee program participants/payers through Measure M program operation.
Local Streets and Roads	Improve and maintain local streets and roads through activities related to congestion management and stormwater pollution prevention.
Transit Operations/ Senior Mobility	Increase access to mobility options, including for seniors and disabled populations.
Safe Routes to School	Diversify travel mode share and reduce private car travel among students and parents.
Regional Traffic Congestion Management (Technology/ Smart Corridor)	Reduce traffic congestion and improve network efficiency.
Stormwater (NPDES/MRP)	Reduce countywide stormwater pollution.

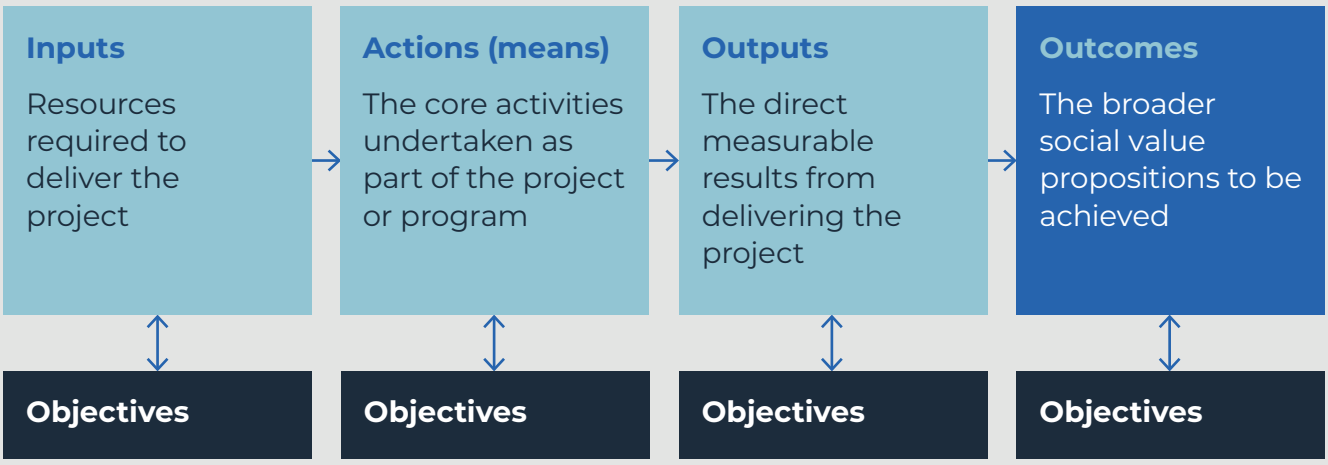
Logic Framework

The project team applied a **Logic Framework** to the Performance Assessment, by highlighting strengths and weaknesses in demonstrating the program's impact toward its intended goals and outcomes. The same tool was then applied to the development of the new **objectives** and **performance measures**, by helping to identify those that help best demonstrate that impact. The Logic Framework is utilized at this stage to articulate direction for the Strategy and Implementation Plan.

In applying the Logic Framework, we ask four questions of Measure M and the programs it funds:

- What **inputs** are required to implement those actions?
- What **actions** must be taken in order to be able to measure outputs/outcomes?
- What measurement **outputs** can be recorded in order to communicate overall success of the program?
- What are the project or program's desired goals and how can they be measured or estimated as program **outcomes**?

Figure 1-2. **Logic Framework**

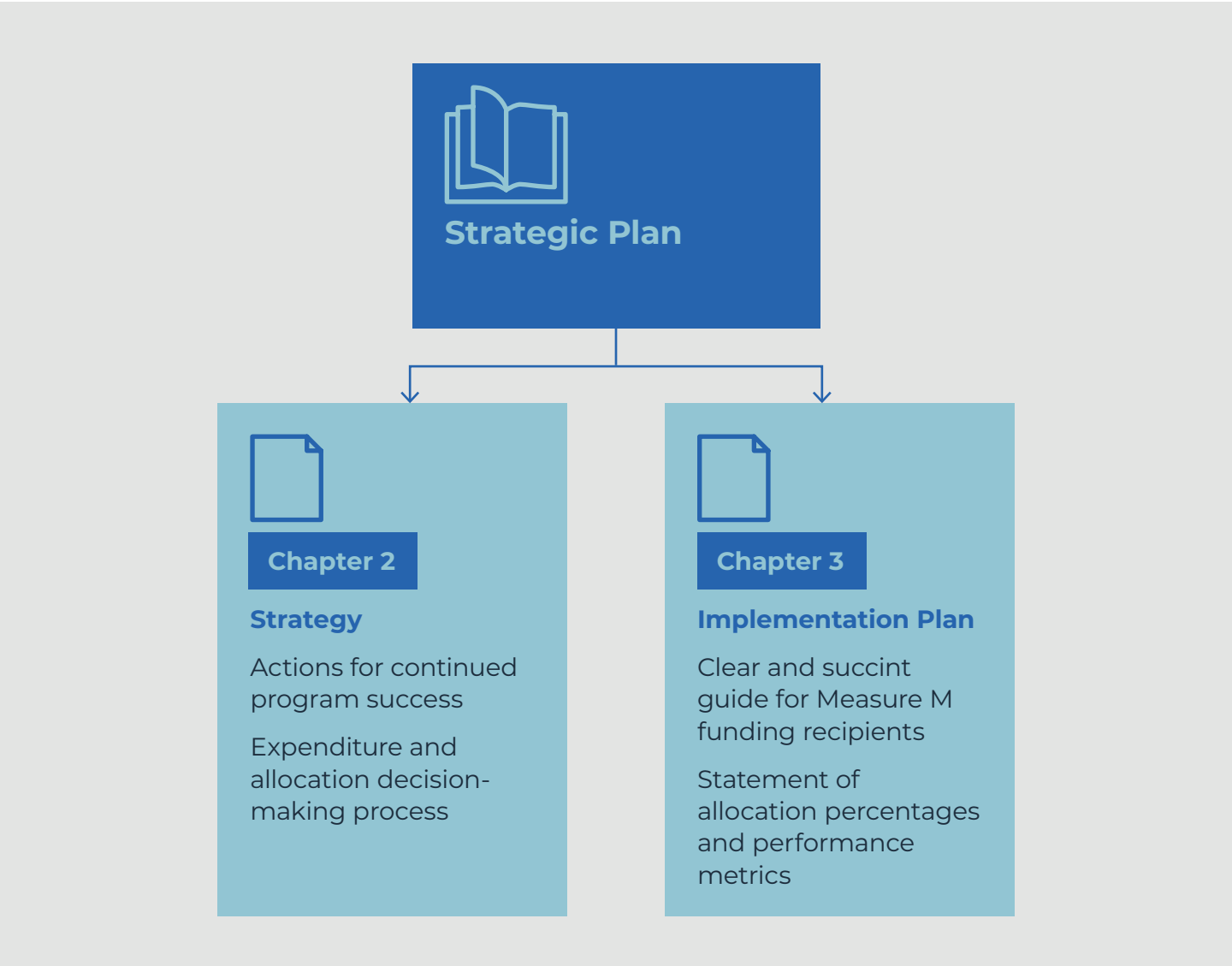


Objectives: *A* ***measurable*** *and* ***time bound*** *indicator used to set performance standards for each element of a strategy – these are set out for each element of the logic framework.*

Strategic Plan Elements

This document, the **Strategic and Implementation Plan**, consists of two major elements, as outlined in **Figure 1-3**. The Strategy identifies actions for C/CAG to take moving forward, and outlines the reasoning behind funding and allocation recommendations. The **Implementation Plan** guides funding recipients by outlining their allocation and defining their objectives for the next five years.

Figure 1-3. Strategic Plan Elements



2

Strategy

Overview

This chapter defines the range of actions C/CAG will take to augment the Measure M program over the next five years. These strategic actions respond to lessons learned and future opportunities identified by the consultant team, C/CAG staff, and strategic partners. Combined, these actions are intended to:

- Advance the "Modernizing Measure M" vision over the next five years;
- Update procedures, practices, and operations to respond to a changing external context;
- Leverage new approaches to program delivery; and
- Support the continued positive impact of the Measure M program.

Guiding Principles

These actions are categorized based on the vision's Guiding Principles:

Flexible Planning All Measure M funding recipients are allowed to use funds for a wide range of uses; C/CAG wants to maintain that flexibility as they plan for the future of the program.

Innovative Programming Measure M funds can be spent on a variety of uses, therefore C/CAG wants to encourage and prioritize funding to be used toward innovative projects and programs (specifically focused on pilots and knowledge sharing opportunities).

Efficient Operation C/CAG wants to continue to maintain and administer the Measure M program efficiently, making the best use of administrative time and simplifying communication between C/CAG and partners.

Monitoring and Evaluation C/CAG wants to understand ongoing impact of the Measure M program.

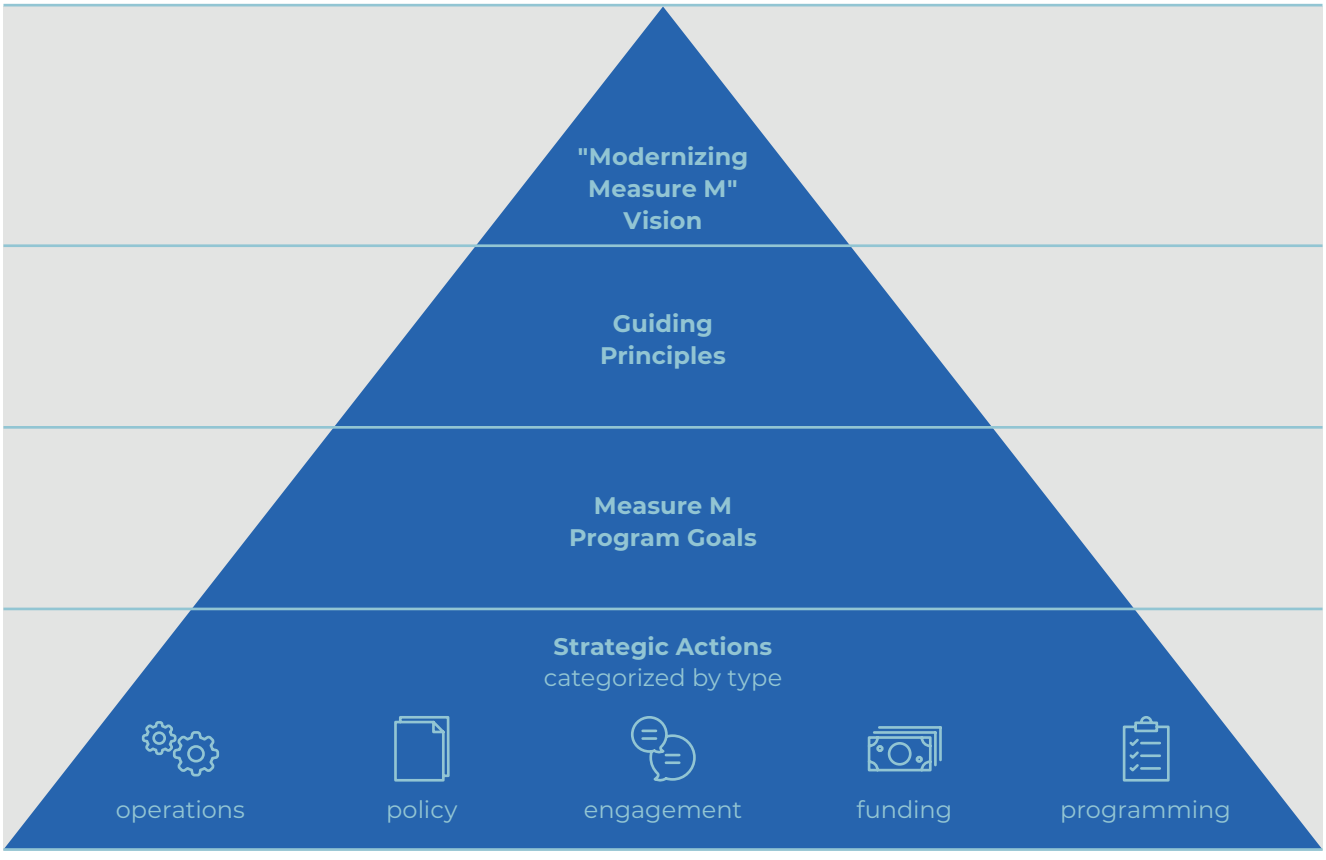
Insight Driven Decision Making C/CAG wants programming to respond to identified needs, opportunities, and expected impacts by rewarding programs that are most successful, and supporting growth and adjustment where needed.

Each Guiding Principle has been assigned key recommendations, or strategic actions. The strategic actions have also been categorized to demonstrate the type of strategy it entails, including:

- Operations: Implementing procedures across the Measure M program
- Policy: Enacting rules and directives for how programming is delivered
- Engagement: Sharing data, results, and progress
- Funding: Reallocating funding to align with emerging strategic needs
- Programming: Delivering types of programs to meet emergent needs

The relationship between the Vision, Guiding Principles, and Strategic Actions is outlined in **Figure 2-1**.

Figure 2-1. Strategy element relationship



Recommendations for C/CAG

Recommended actions for the Measure M program as a whole have been outlined below, with actions related to each guiding principle categorized in a unique subsection.

Flexible Planning

Measure M funds should continue to provide a level of flexibility within the existing wide variety of programs across San Mateo County. For example, funding both programs and capital projects, and basic services and more innovative interventions. At present, there are a few instances (e.g. use of SRTS funds to fund school site stormwater infrastructure projects) where the flexible nature of the Measure M funds established a unique project or program. However, this experience has been limited to date, and these unique projects/programs tend be funded through overflow or unexpected leftover sources.

Strategic Action 1 Continue Allowance of Flexible Use of Funds

Measure M should continue to allow jurisdictions and Countywide Programs to apply funds to a variety of uses.

Strategic Action type	Policy
Implementation timeline	Year 1
Estimated budget	No budget required
Priority	High

Strategic Action 2 Expand Designated Eligible Projects and Programs for Local Streets and Roads

The upcoming Implementation Plan should expand upon the list of eligible project categories under the approved legislation for Local Streets and Roads funding. While the current Local Streets and Roads program allows for jurisdictions to utilize their funding flexibly, a more comprehensive list of approved uses will encourage a broader range of programming from funding recipients.

Strategic Action type	Policy
Implementation timeline	Year 1
Estimated budget	No budget required
Priority	High

Innovative Programming

Measure M funds should be allocated to projects or programs that exhibit innovative practices, namely ideas developed through C/CAG and other key stakeholders that are transformed into a practical reality with tangible impacts to meet Measure M's overarching goals. These can include competitive pilot programs, developing key partnerships with forward-thinking agencies, guidance encouraging innovation for the Countywide Transportation Programs and 'best practice' sharing sessions.

Strategic Action 3 Create Competitive Pilot Program

Per the Measure M legislation, unused Administrative funding is distributed back to the jurisdictions and Countywide Programs (each receiving 50%). While the legal understanding of the measure indicates that the 50% received by the jurisdictions should be allocated through the same calculation as dictated by the Local Streets and Roads program, it does not specify the allocation process for the half that is returned to the Countywide Programs. Additionally, accrued interest does not have a specified allocation path.

This recommendation encourages innovation through the development of a competitive process for Countywide Programs. The purpose is to initiate pilot programs. C/CAG should allow the four Countywide Programs to compete for the leftover Administration and accrued interest funds that are set aside for them. . Based on historical expenditure data, it is expected that these two sources will generate between $95,000 to $200,000 annually.

It is recommended that C/CAG undertake this process every two years, when the combined interest and half of unused administrative funds have accrued to at least $150,000. If, after two years, less than $150,000 has accrued, C/CAG should postpone the process until that amount is available.

As C/CAG evaluates potential projects, they may want to consider a scoring mechanism that evaluates the following:

- **Innovation** How is it different from existing core programs and from programs undertaken elsewhere?
- **Planning** Does the project or program have a clear plan or proposal, including set objectives that articulate how it will contribute to Measure M goals?
- **Deliverability** Has this project been implemented in other jurisdictions – if so, have delivery lessons been carried forward?
- **Evaluation**: Does the applicant have sufficient resources to evaluate the success of the pilot and share lessons learned?
- **Opportunity for expansion** If the pilot is successful, can it be duplicated or implemented elsewhere within the county or Bay Area?
- **Countywide significance** Does the pilot support the full county, or does it disproportionately impact specific jurisdictions?
- **Equity** Does the pilot support historically marginalized communities in San Mateo County?
- **Program collaboration** Does the pilot involve more than one Countywide Program, providing multifaceted benefits to the San Mateo County community?

C/CAG staff will develop the final scoring criteria with input from Committees and the C/CAG Board.

Strategic Action type	Funding, Programming
Implementation timeline	Year 2
Estimated budget	165 hours of consultant time to support development, and 50 hours of C/CAG Admin staff time per year
Priority	High

Strategic Action 4 Encourage Program Innovation

Countywide Programs should work with C/CAG to focus on implementation of program-specific innovations. C/CAG should provide a list of "innovative focuses," or key projects for each Countywide Program. These "innovative focuses" as outlined further in the Implementation Plan (Chapter 3 of this document), were compiled through best practice research related to similar transportation programs across the country. The full Best Practices review is included in Appendix B. The Countywide Programs should consider redirecting funds toward those projects when they have sufficient funding available.

Strategic Action type	Programming
Implementation timeline	Year 2
Estimated budget	No separate budgeting action is required for C/CAG. Countywide Program Managers may direct budget as deemed appropriate.
Priority	Medium

Strategic Action 5 Facilitate Knowledge Sharing

C/CAG should provide the opportunity for funding recipients to learn from each other, and from other jurisdictions and programs undertaking similar efforts nationally. This strategic action involves the development of workshops and other knowledge sharing opportunities to capture best practices and lessons learned on programs and projects related to those funded by Measure M. These knowledge sharing sessions can take place during regularly scheduled gatherings, such as Committee and Board meetings, to minimize administrative time needed from C/CAG staff.

Strategic Action type	Operations
Implementation timeline	Year 2-5
Estimated budget	30-40 hours of C/CAG Admin staff time per year
Priority	Medium

Efficient Operation

The Measure M program should continue to be implemented, managed, and maintained efficiently, to help maximize administrative time. Operational strategies should be encouraged to increase work productivity whilst incurring minimal additional costs. An example is transitioning to a centralized electronic database for reporting purposes.

Case Study

Alameda County's Vehicle Registration requires fund recipients to submit reporting forms. The template is available online, as well as instructions for submitting the form.

Strategic Action 6 Create and Utilize Online Reporting Form

Currently jurisdictions receiving Local Streets and Roads funding send reports to C/CAG through a PDF form. Bringing reporting processes into an online form will both facilitate standard responses from all funding recipients, and eliminate coordination and time on C/CAG's Admin staff.

Strategic Action type	Operations
Implementation timeline	Year 1
Estimated budget	16-20 hours of C/CAG Admin staff time in Year 1, no additional budget needed over current baseline in subsequent years
Priority	High

Strategic Action 7 Shift Toward Streamlined Budget Tracking

The current spreadsheet used to track Measure M revenue and expenditure is overly complex, requiring extra reconciliation processes to be undertaken in order to provide a full overview of the Measure M budget. As this same tracking system was adopted from a previous group of Admin staff, C/CAG Admin staff should develop a new budget-tracking spreadsheet structure, simplifying the back-end processes and improving transparency.

Strategic Action type	Operations
Implementation timeline	Year 1-2
Estimated budget	20 hours of C/CAG Admin staff time in Year 1, no additional budget needed over current baseline, though regular maintenance at current level will be needed annually.
Priority	Medium

Monitoring and Evaluation

Although both of the previous Measure M 5-Year Implementation Plans have outlined Performance Measures associated with each funding recipient, monitoring and reporting of progress and success toward outcomes remains inconsistent. Within both the Local Streets and Roads and Countywide Program allocations, Measure M funds are currently typically lumped in with funds from other sources, and sometimes only account for a small percentage of the program or project's operating budget. While the Measure M funding may be contributing to an incredibly successful program, the program's overall successes may not speak directly to the impact of the Measure M funding itself.

A more transparent reporting process is required with a focused set of readily measurable metrics in order to provide enough data to demonstrate change and long-term impact from specific Measure M projects and programs.

Strategic Action 8 Provide Program Reporting Template

In line with Strategic Action 6 (Online Reporting Form) above, it is crucial that reporting for jurisdictions and Countywide Programs utilize standardize metrics for improved program-wide and year over year data collection. Any forms developed should outline the metrics and scales to be used in order to ensure data received is comparable across jurisdictions and able to be combined to demonstrate Measure M's impact.

Strategic Action type	Operations, Engagement
Implementation timeline	Year 1
Estimated budget	16 hours of C/CAG staff time to create database of program impacts, and ongoing effort to maintain the database.
Priority	High

Strategic Action 9 Require Annual Reporting

Currently, C/CAG only requires reports from jurisdictions through the Local Streets and Roads program if they are requesting a funding reimbursement. This makes it more difficult for C/CAG Admin staff to keep track of funds that have been allocated, but not spent. While C/CAG should not require jurisdictions to spend their allocated funding each year (allowing for funds to accrue may encourage spending on innovative projects), they should require an annual report from each funding recipient. This will enable the program administrators to assess progress throughout the five years during the implementation plan period, and identify lessons learned and areas for improvement.

The logic framework-based objectives identified for each of the funding recipients (outlined in the Implementation Plan, Chapter 3 of this document) outlines key metrics and performance indicators that C/CAG should collect from each program, allowing C/CAG administrators to more easily compile data across reports to detail impact based on each unique metric.

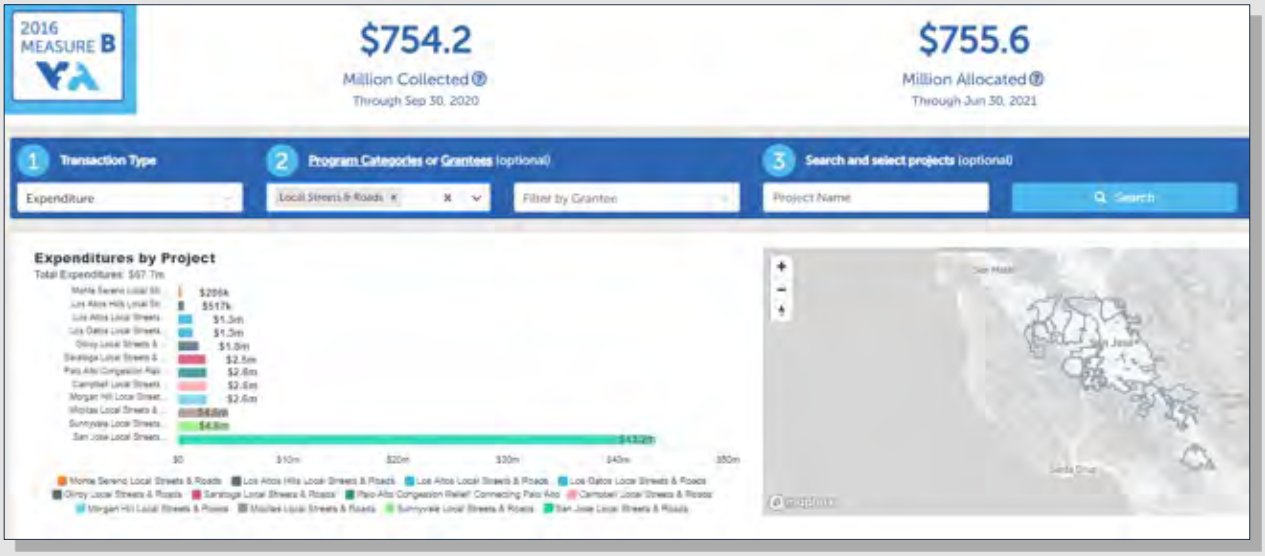
C/CAG will likely want to consider entering into a five-year funding agreement with each funding recipient that outlines reporting requirements necessary for fund reimbursement.

Strategic Action type	Policy
Implementation timeline	Year 1
Estimated budget	No budget required, time spent collecting Annual Reports will be offset by time saved in budget maintenance.
Priority	High

Strategic Action 10 Provide Transparent Reporting

The Measure M program was approved by voters until 2035, at which time it may be reconsidered through an additional ballot measure. Transparency and accountability focused reporting to the voting public are key elements of a successful program. This recommendation is focused on expanding program accountability and transparency with an emphasis on how funding is spent and what projects/programs have been accomplished. C/CAG should consider developing a forward-facing dashboard that demonstrates impact by Countywide Program and by jurisdiction, leveraging data from recommendations A-1 and A-2.

Strategic Action type	Engagement
Implementation timeline	Years 1-5 (timeline for development can be flexible, but dashboard should be launched by Year 5).
Estimated budget	$50,000
Priority	Medium



SCVTA Measure B Transparency Website

Case Study

Santa Clara County's Measure B has a public-facing website that tracks how much funding has been allocated to a certain project, the progress of the project. Users may also visualize funding in a chart or map and download project data as a PDF or CSV:

2016measureb.vta.org

Insight Driven Decision Making

This theme relates to ensuring allocation of funds matches programmatic needs, through collating and analyzing primary and secondary data. This is based on a review of historical data and reports, a series of interviews with C/CAG staff and Countywide Program managers, and the surveys with representatives from each of the jurisdictions eligible to receive funding.

It is important to continue reviewing and evaluating the current Measure M Program funding allocation structure every five years. This should include regular performance assessment of the program, using the latest data available for allocations and expenditures, to help evaluate the impact and success the Measure M program has had, all documented within a Strategic Plan.

Strategic Action 11 Standardize Evaluation Frameworks

As described in Chapter 1 (section 1.2.4) above, the Logic Framework model allows each program receiving Measure M funding to outline clear objectives and regularly evaluate success. Objectives for each program have been identified using the Logic Framework in the Implementation Plan. C/CAG should work with funding recipients to measure against those objectives and refine Logic Framework when necessary.

Strategic Action type	Operations
Implementation timeline	Years 1-5
Estimated budget	No budget required
Priority	High

Strategic Action 12 Implement Changes Based on Need-based Program Review

The initial Implementation Plan (March 2011) designated allocation of that net 50% based on anticipated need for each of the four programs[1]. The second Implementation Plan (May 2016) did not make any changes to those allocations. As C/CAG finalizes the Implementation Plan for the period covering Fiscal Year 2021/22-2025/26, it is sensible review of the percentage allocations to each Countywide Program, as is outlined in the Measure M text, based on changing needs, priorities, and opportunities in the county throughout the past ten years.

C/CAG has evaluated each of the four Countywide Programs through a needs-based estimation process (outlined in full detail in Section 2.3.), which examines historical revenue and expenditure data and places it in the context of additional qualitative factors.

The recommended Countywide Program allocation is as follows:

- Transit Operations/Senior Mobility: 18%
- Technology/Smart Corridor: 11%
- Safe Routes to School: 6%
- Stormwater (NPDES/MRP): 15%

Strategic Action type	Funding
Implementation timeline	Years 1
Estimated budget	No budget required
Priority	High

[1] Measure M Implementation Plan, 2011, Measure M Implementation Plan (ca.gov)

Strategic Action 13 Undertake Strategic Program Review

C/CAG should revisit Countywide Program funding allocation structure every five years based on programmatic needs, benefits, and progress. While there is currently insufficient data on programmatic impact to develop an allocation model based on programmatic impact or success (hence the inclusion of recommendation P-2 for a more immediate needs-based allocation for this implementation plan period), this may be something C/CAG wants to consider in the future in order to encourage effective programming. It is recommended that C/CAG reviews the data collected through years 1-4 of this current Plan period, and develop an impact-based funding model that rewards programs that can demonstrate the most progress toward the objectives set out in their Evaluation Frameworks.

Strategic Action type	Funding
Implementation timeline	Years 4-5
Estimated budget	Staff time or consultant support will vary depending on whether new processes are desired; no additional budget required to implement
Priority	High

Recommendations for Funding Recipients

While the actions outlined above demonstrate a recommended path to be taken by C/CAG in relation to their interaction with funding recipients, the project team has also identified specific recommendations for funding recipients themselves.

Recommend actions for the **Local Streets and Roads** program will result in changes in reporting structure for jurisdictions, but the actions themselves are largely to be covered by C/CAG. These actions have been described in more detail in Section 2.2 and include:

- **Strategic Action 2** Expand Designated Programming Options for Local Streets and Roads
- **Strategic Action 6** Create and Utilize Online Reporting Form
- **Strategic Action 8** Provide Program Reporting Template
- **Strategic Action 9** Require Annual Reporting
- **Strategic Action 11** Standardize Evaluation Frameworks

The project team acknowledges that the Countywide Programs rely on Measure M funding for at least some of the daily operation costs, and while C/CAG wants to encourage innovation within the programs, Measure M funding does not provide enough coverage to influence significant changes in regular programming. Thus, Countywide Program recommendations fall under two categories:

Operational Recommendations are focused around how Measure M funds should be operated or spent by Countywide Program managers, and how reporting processes, etc. should be adjusted.

Innovative Focuses are focused around suggestions / recommendations for innovations within program areas, based on best practice review nationally.

Transit Operations / Senior Mobility

Measure M funds are provided to SamTrans to support the Senior Mobility programs in the county as well as the Redi-Wheels program. The Redi-Wheels program provides 300,000 trips per year (pre-COVID-19 Pandemic) to seniors and mobility impaired individuals. Trips are scheduled by phone, with about 35% of calls as regularly scheduled 'subscription' calls. Redi-wheels provides transportation for those who qualify for any reason, not just 'essential' trips.

Additional "Senior Mobility" programs include initiatives like training, and events for seniors on how to ride transit. These have decreased recently due to the COVID-19 pandemic and staff turnover.

Case Study

Peninsula Volunteers in **San Mateo County** provides subsidized Lyft rides to preregistered seniors. Users may call ahead to the Little House Activity Center and volunteers will schedule rides between home, the Little House, and medical services. Users pay between $5 and $9 per ride, and the rest is covered through the program.

Operational Recommendations:

In addition to Measure M funding that is set aside specifically for the Redi-Wheels program annually, senior mobility funding must be spent on other programs for senior and disabled populations. Once additional allocation over that amount is identified for the year, C/CAG and SamTrans will work together to determine how funds will be spent.

Expand understanding of vehicle miles travelled (VMT) and trips reduced through Redi-Wheels service:

Understand what percentage of SamTrans (non-paratransit) riders are seniors through onboard surveys with the goal of understanding trends related to seniors who are able to take transit doing so rather than driving or using paratransit programs.

Identify the percentage of rides that are shared versus deadheading or moving a single customer to understand which trips might otherwise be taken in a taxi or single-occupancy vehicle.

Innovative Focuses:

Improve reservation system, allowing for online reservations.

Explore pilot program on with on-demand service using Transportation Network Companies (TNCs).

Focus on transit education for seniors who are able to ride transit to encourage shared rides that ultimately require less investment from SamTrans.

Technology/Smart Corridor

One large component of the Intelligent Transportation System (ITS) or Technology program is focusing on the delivery of the San Mateo County Smart Corridor project. This project maximizes efficiencies of the existing transportation network using technology devices, including cameras, detection systems, fiber communications and changeable messaging displays on roadsides. The project also minimizes the impact of freeway incident traffic on local streets through proactive traffic management.

C/CAG has been working with the cities in the southern part of the county, and has now moved on to work on two additional segments:

- City of South San Francisco – Completed 100% project design, and construction will begin in summer 2021.
- Cities of Daly City, Brisbane and Colma – Finished project approval and received environmental clearance. Will begin project design in the Summer 2021.

Case Study

The 33 Smart Mobility Corridor in **Columbus, OH** is a 35-mile highway corridor that connects multiple employment hubs, including Honda's North American campus, R&D firms, manufacturers and logistics companies. These institutions work together to test smart and AV technologies.

Operational Recommendations:

Develop standard reporting processes documenting time-savings from each deployment of the Smart Corridor system.

Measure M funding is a valuable source of local match for Smart Corridor grant-funded projects. In years where C/CAG does not anticipate the need for upcoming local match funding and all operational needs have been covered, funding should be dedicated to innovation and improved communication/engagement with drivers.

Innovative Focuses:

Improve public information-sharing about route detours through partnerships with private providers, such as Waze and Google, instead of/in addition to physical signage infrastructure.

Explore opportunities to pilot concepts such as Centralized Emergency Vehicle Preemption (CEVP), which offers a software-based solution to smoothly moving emergency vehicles through intersections and along corridors.

Develop supportive policy guidance for San Mateo County jurisdictions, particularly permit departments, to identify locations of Smart Corridor fiber infrastructure and protect against damage due to third-party activities. Work with jurisdictions to determine long-term maintenance solutions, including funding partnerships that support the program beyond what is accessible through Measure M. Explore public-private partnership opportunities to expand the Smart Corridor communications network and its uses (public buildings, libraries, etc.), in addition to generate revenues to support the system over the long-term.

Safe Routes to School (SRTS)

The SRTS Program is a grant-based program. C/CAG, as the Congestion Management Agency, is the designated agency for San Mateo County that receives federal Congestion Management and Air Quality (CMAQ) funds, including funds designated for the SRTS Program. C/CAG administers the program funds, serving as fiscal agent for the Program. The San Mateo County Superintendent of Schools, also referred to as San Mateo County Office of Education (SMCOE), serves as the lead agency managing the day-to-day operations and project implementation activities. Measure M funds go toward the 11.5% local match required by Caltrans to receive CMAQ funds.

The program currently supports 20 grantees across 15 school districts. Support is almost exclusively programmatic rather than infrastructure based (though when there was more funding previously there had been some infrastructure projects). In addition to typical programming, COE has undertaken other efforts, such as an equity analysis to determine schools with a great deal of needs, and engage with cities directly.

Operational Recommendations:

Beyond the funding utilized for CMAQ grants, COE and C/CAG will identify uses for any leftover funds in partnership with SRTS sponsors.

Improve upon modal travel survey by ensuring survey is conducted at the same time each year, utilizing the same modal categories, to better demonstrate year over year impact of SRTS on mode shift.

Innovative Focuses:

Continue to collaborate with C/CAG and outside partners (including other Countywide Program managers and local non-profit organizations) to implement SRTS infrastructure projects, such as those in partnership with C/CAG's stormwater team or those identified in the High Injury Network Plan currently being developed.

Continue to focus efforts on schools in low-income areas.

Work with jurisdictions to support formal Safe Routes to School policy development.

Case Study

Metro Oregon has released a **Safe Routes to School Back to School Toolkit** that suggests strategies in low-income neighborhoods, such as establishing a Memorandum of Understanding between the property owner of Park & Walk locations and the school/city to limit parking enforcement or towing that may disproportionately affect BIPOC (Black, Indigenous, and people of color) and low-income families.

Stormwater (NPDES/MRP)

C/CAG supports jurisdictions at multiple scales assist its member agencies comply with mandatory requirement under the Municipal Regional Stormwater Permit (MRP). The countywide stormwater program provides direct consultant support to the cities/towns and county, and undertakes efforts on their behalf, such as water quality monitoring, public outreach and education, on-land visual assessments for trash, staff training, and the development of green stormwater infrastructure planning documents and resources. The countywide program also leads countywide planning efforts in support of permit compliance objectives and collaborates on a regional level with other countywide programs (such as via the Bay Area Stormwater Management Agencies Association (BASMAA) and other regional partners).

Operational Recommendations:

Specify workstreams for Measure M funding to do more with available funds other than general stormwater program support (e.g., focus more on project design and implementation).

Support knowledge sharing amongst jurisdictions to create consistent definition of and progress towards advancing 'innovative practices' across the county.

Innovative Focuses:

Continue to partner with schools on green infrastructure in conjunction with SRTS or schoolyard greening/educational curricula.

Continue advancing sustainable street project planning and implementation.

Continue advancing planning, design and implementation of regional scale stormwater facilities.

Case Study

Prince George's County currently utilizes a Community Based Public Private Partnership (CBP3) model as a solution to improve stormwater infrastructure and make a commitment to impact the local economy through partnering with disadvantaged subcontractors. This includes planning, designing, and constructing green infrastructure retrofits across 4000 acres of impervious surfaces in Prince Georges County (including a diverse mix of sites and land uses).

Needs-based Allocation Overview

Overview and allocation requirements

The Measure M program collects revenue from a Countywide vehicle registration fee, which is then allocated to jurisdictions and Countywide Transportation Programs. As described in the Measure M legislation text, the projects and programs funded by Measure M must be consistent with the regional transportation plan, and must have a relationship or benefit those paying the vehicle registration fee.

After a 5% allocation to administration of the program, 50% of the Measure M net revenue is allocated to the four Countywide Transportation Programs identified in the original measure. The Measure indicates that the Implementation Plan (updated every five years) should specify the percentages of funds allocated to each program or project.

The initial Implementation Plan (March 2011) designated allocation of that net 50% based on anticipated need for each of the four programs :

- Transit Operations/Senior Mobility: 22%
- Technology/Smart Corridor: 10%
- Safe Routes to School: 6%
- Stormwater (NPDES/MRP): 12%

The second Implementation Plan (May 2016) did not make any changes to those allocations.

The next Implementation Plan for Measure M (covering fiscal years 2021/22-2025/26) includes a review of the percentage allocations to each Countywide Program, as is outlined in the Measure M legislation text, based on changing needs, priorities, and opportunities in the county.

This section presents an initial analysis to support the process of finalizing allocation percentages based on a combined quantitative and qualitative assessment. This framework and the resulting potential allocations helped guide C/CAG on the final funding decision.

Estimating programmatic need

The Fiscal Year 2021/22-2025/26 Implementation Plan includes consideration of programmatic need based on a consistent data driven approach applied to each program. The project team has recommended that future implementation plans make use of both a needs based and impact based assessment model identified in the proposed program evaluation framework of the Fiscal Year 2021/22-2025/26 Implementation Plan.

However, as this framework has not been implemented, the application framework applied within the Fiscal Year 2021/22-2025/26 Implementation Plan is primarily needs focused.

The needs-based focus contains two approaches to capture a data-driven perspective on how Measure M funding supports the overall finances of each program. It is based on historic funding and utilization, as well as a qualitative assessment to explore the future outlook of each program from a risk and potential funding perspective. Further details on these approaches are provided.

Quantitative funding score (weighted at 100% total) was developed based on historical funding data from the inception of the Measure M program through fiscal year 2019/20. The quantitative score includes four weighted factors as listed below:

- Amount of Measure M allocation spent: Does the program spend its funding allocation? (weighted at 67%)
- Share of program budget from Measure M: How critical is Measure M to the program's overall budget? (weighted at 11%)
- Ability to unlock additional budget: Based on historical local match data, what level of outside funding can we anticipate is conditional on Measure M funding? (weighted at 11%)
- Change in other available funding sources: Does the program have other funding sources that could be used instead of Measure M? (weighted at 11%)

Qualitative funding score (weighted at 100% total) was developed based on non-quantifiable factors:

- Risk of sizeable allocation decrease: Is the program at-risk of losing a significant portion of their funds if their Measure M allocation decreases? Are there other funding sources that we anticipate will be diminished or eliminated in future years? (weighted at 50%)
- Programmatic requirements outside of C/CAG's purview: Does the program need to provide specific services based on legal requirement? If the program were eliminated or underfunded, would costs be expected to fall on other agencies or jurisdictions within the county? (weighted at 50%)

Methodology and scoring

The following scoring methodology was developed by the project team, in coordination with Measure M stakeholders. The process was presented to stakeholders through C/CAG's TAC and CMEQ Committees, and Board of Directors at multiple stages throughout the development of the methodology and after the final recommended allocations had been determined. Both the TAC and CMEQ Committees recommended approval of the allocation.

Additionally, the project team met with each Countywide Transportation Program team to discuss the methodology, receive feedback, and provide information about expected changes to their program allocation.

Quantitative funding scores

Each Countywide Program is assigned an overall score based on its performance against the four quantitative factors described above. Scores are calculated by identifying the 'highest scoring' program and assigning it a score of 5.0. The other three programs are then assigned scores accordingly based on how well they compare with the highest scoring program. Scores are then rounded to the nearest 0.5 for ease of interpretation. Data from inception to Fiscal Year 2019/20 was used to determine quantitative scores, which was provided and reviewed by each Countywide Program manager.

Quantitative scores and the methodology behind them are described on the following pages.

Amount of Measure M allocation spent
This factor is determined by calculating the percentage of allocated funds that have been spent or reported as earmarked for specific projects since the inception of the Measure M program.

Since significant amounts of unspent funds may signify that additional funding may not be required, this factor is considered a crucial component of the analysis and has been assigned a higher weight (67%) than the other three quantitative factors.

Calculation and scores for this factor are outlined in **Table 2-1**. The highest score is awarded to the program that has spent or reported as earmarked for specific projects the largest percentage of its Measure M allocation.

Table 2-1. Allocation spent

	Transit Operations/ Senior Mobility	Technology/ Smart Corridor	Safe Routes to School	Stormwater (NPDES/MRP)
Unspent funds	153,030	–	1,330,076	350,579
% used	**99%**	**100%**	**64%**	**95%**
Score	**5.0**	**5.0**	**3.0**	**5.0**

Source: C/CAG Measure M budgets

Share of program budget from Measure M

This factor communicates the relative importance of Measure M within each program. As demonstrated in **Table 2-2**, it is calculated by comparing the percentage of a Countywide Program budget that comes from Measure M to the percentage of Measure M's allocation that program receives. The highest score is awarded to the program on which Measure M is having the highest proportionate impact.

Table 2-2. Share of Measure M budget

	Transit Operations/ Senior Mobility	Technology/ Smart Corridor	Safe Routes to School	Stormwater (NPDES/MRP)
% of Program from Measure M	11%	24%	66%	49%
% of Measure M Allocation	22%	10%	6%	12%
A/B	49%	244%	1,103%	410%
Score	**0.0**	**1.0**	**5.0**	**2.0**

Source: C/CAG Measure M budgets; Program budgets provided by each Countywide Program Manager

Ability to unlock additional budget
This factor demonstrates how much competitive grant funding can be unlocked as a result of Measure M, and how much funding may be at risk if Measure M funds decrease. It is calculated by comparing each program's allocated Measure M funds to the grant funding it has received, as shown in **Table 2-3**. Programs that receive a match funding that is equal to or greater than Measure M contributions receive a score of 5 (with funding received capped at the amount of total Measure M allocation to avoid unfair advantage for different match requirements). When Measure M funds unlock funds lower than the total value of Measure M funding provided, they receive a score from 0-5 (rounded to nearest 0.5) based on value of unlocked funds in proportion to Measure M funds provided.

Table 2-3. Ability to unlock additional budget

	Transit Operations/ Senior Mobility	Technology/ Smart Corridor	Safe Routes to School	Stormwater (NPDES/MRP)
Allocated	13,619,905	6,223,593	3,734,156	7,468,312
Grant Funding Received	13,569,438	6,223,593	3,734,156	1,162,143
Percent of allocation achieved in grant funding	99%	100%	100%	16%
Score	**5.0**	**5.0**	**5.0**	**1.0**

Source: C/CAG Measure M budgets; Program budgets provided by each Countywide Program Manager

Change in other available funding sources

This factor examines how dependent each program is on Measure M funding specifically. Funding sources for each of the Countywide Programs vary and it is difficult to make assumptions surrounding future availability of funding sources. Thus, the calculation for this factor assumes that the initial determination of 'need' at the inception of the Measure M program was appropriate for that Implementation Plan period (fiscal years 2010/11-2014/15). It compares revenue (excluding Measure M) for each program from that period with revenue from the most recent Implementation Plan period (fiscal years 2015/16-2020/21) to identify a percentage change. The highest score is awarded to the program that demonstrated the smallest positive or largest negative change in revenue.

Table 2-4. Change in other available funding sources

	Transit Operations/ Senior Mobility	Technology/ Smart Corridor	Safe Routes to School	Stormwater (NPDES/MRP)
Revenue FY 2011-2015	63,764,675	24,492,196	2,964,552	7,878,246
Revenue FY 2016-2021	80,611,792	7,685,322	3,128,984	9,256,229
% Change	126%	-31%	82%	117.5%
Score	**1.0**	**5.0**	**1.5**	**1.5**

Source: C/CAG Measure M budgets; Program budgets provided by each Countywide Program Manager

Overall quantitative scores
Quantitative scores for all four programs are collated below, and a final quantitative score has been compiled in **Table 2-5**. As described above, the "Use of previous budget" factor has been assigned a high weight to demonstrate the importance of spending or earmarking all funds coming from Measure M. The other three factors have all been assigned the same weight.

Table 2-5. Quantitative scores

	Weight	Transit Operations/ Senior Mobility	Technology/ Smart Corridor	Safe Routes to School	Stormwater (NPDES/ MRP)
Use of Previous Budget	0.67	5.0	5.0	3.0	5.0
Share of Program Budget vs. Measure M Budget	0.11	0.0	1.0	5.0	2.0
Ability to Unlock Additional Budget	0.11	5.0	5.0	5.0	1.0
Growth in Other Funding Sources	0.11	1.0	5.0	1.5	1.5
Quantitative Score		**4.0**	**4.6**	**3.3**	**3.8**

Qualitative funding scores

In addition to the quantitative evaluation, the qualitative analysis allows decision makers to consider additional context related to programmatic requirements and risk associated with large changes in funding.

The following qualitative scores have been informed through working meetings with Countywide Program Managers and feedback provided by members of C/CAG's TAC and CMEQ Committees and Board. Both qualitative factors have been assigned equal weight.

- **Risk of decrease to current allocation** estimates the risk to each project related to a percentage decrease in allocation, and includes consideration around program funding sources that are known or expected to be decreasing moving forward. Programs with higher Measure M allocations currently face more risk of a larger decrease in funding allocation.
- **Programmatic requirements outside of C/CAG's purview** accounts for outside program commitments and mandates. This is most clearly demonstrated in the Transit Operations/Senior Mobility program (which supports the federally mandated paratransit program) and the Stormwater program where the municipal permit requirements have expanded and are likely to continue to grow in cost. The Technology/Smart Corridor project has also been assigned a positive score because of its project commitment to jurisdictions within the county, such as device maintenance and replacement. This maintenance responsibility would fall onto the jurisdictions if C/CAG is unable to fund it.

The recommended allocation breakdown is presented in **Table 2-6**.

Combined quantitative and qualitative scores

Table 2-7 presents a combined quantitative and qualitative score for each program, leading to a recommended program allocation percentage. These allocation levels, recommended by C/CAG staff and consultant team, have been reviewed by the TAC and CMEQ. Both Committees recommended the percentages for C/CAG Board approval.

Table 2-6. Qualitative scores

	Weight	Transit Operations/ Senior Mobility	Technology/ Smart Corridor	Safe Routes to School	Stormwater (NPDES/ MRP)
Risk of decrease to current allocation	0.5	5.0	–	–	3.0
Future programming commitments	0.5	5.0	2.0	–	5.0
Qualitative Score		**5.0**	**1.0**	**–**	**4.0**

Table 2-7. **Final scores and allocation guidance**

	Weight	Transit Operations/ Senior Mobility	Technology/ Smart Corridor	Safe Routes to School	Stormwater (NPDES/ MRP)
Use of Previous Budget	0.67	5.0	5.0	3.0	5.0
Share of Program Budget vs. Measure M Budget	0.11	0.0	1.0	5.0	2.0
Ability to Unlock Additional Budget	0.11	5.0	5.0	5.0	1.0
Growth in Other Funding Sources	0.11	1.0	5.0	1.5	1.5
Quantitative Score		**4.0**	**4.6**	**3.3**	**3.8**
Risk of decrease to current allocation	0.5	5.0	–	–	3.0
Future programming commitments	0.5	5.0	2.0	–	5.0
Qualitative Score		**5.0**	**1.0**	**–**	**4.0**
Total Score		**9.0**	**5.6**	**3.3**	**7.6**
Overall Allocation		**18%**	**11%**	**6%**	**15%**

3

Implementation Plan

Overview

Implementation Plan Purpose

The Measure M Implementation Plan describes the various programs identified in the Expenditure Plan in more detail and established percentages of funds allocated to each of the Countywide Transportation Programs. The Implementation Plan also identifies specific projects and programs under each category that would be eligible to receive funds along with identifying the targeted performance measures for each activity. The Implementation Plan, which requires adoption by the C/CAG Board, is developed at the onset of the 25-Year Measure M Program and is updated every 5 years. This Implementation Plan covers the period from Fiscal Years (FY) 2021/22 to 2025/26.

Methodology

This Implementation Plan was developed based on research and stakeholder outreach undertaken through the Measure M Strategic Plan process. Researched involved the review of historic revenue allocation and spend, and funding recipient programmatic metrics. Funding recipients and other stakeholders were consulted through interviews, focus groups, an online survey, and presentations to C/CAG's Congestion Management Program Technical Advisory Committee (TAC), Congestion Management and Environmental Quality Committee (CMEQ) and Board of Directors.

The objectives and performance metrics outlined below have been developed as a result of the Strategic Plan, and in coordination with the funding recipients responsible for maintaining each program.

Collection of the Fee

The $10 Vehicle Registration Fee (VRF) will be collected for a period of 25 years, beginning on May 2, 2011 and ending on May 1, 2036. Beginning approximately July 2011 and every month thereafter for the duration of the fee, the Department of Motor Vehicles (DMV) will issue C/CAG a monthly check for revenues collected from the prior month. The estimated revenue is $6.7 million annually and $33.5 million over the 5-year implementation period. This amount takes into consideration the DMV's administrative fee charge of approximately $0.005 (one-half of a cent) per every $10 VRF collected.

Implementation Plan (FY 2021/22-2025/26)

As indicated in the approved Measure M Expenditure Plan up to 5% of the proceeds is allocated for program administration with 50% of the net revenue allocated to the Local Streets and Roads category and 50% of the net revenue allocated to the Countywide Transportation Programs. The Countywide programs includes the following: Transit Operations and/or Senior Mobility, Technology and Smart Corridors, Safe Routes to School (SRTS), and Stormwater (National Pollutant Discharge Elimination System (NPDES) and Municipal Regional Permit (MRP)).

The objectives listed in the Implementation Plan aim to help C/CAG and partners achieve the following goals through the Measure M program:

Program Goals

Measure M Program:
Administration

Goal:
Support vehicle registration fee program participants/payers through Measure M program operation.

Measure M Program:
Local Streets and Roads

Goal:
Improve and maintain local streets and roads through activities related to congestion management and stormwater pollution prevention.

Measure M Program:
Transit Operations / Senior Mobility

Goal:
Increase access to mobility options, including for seniors and disabled populations.

Measure M Program:
Safe Routes to School

Goal:
Diversify travel mode share and reduce private car travel among students.

Measure M Program:
Technology/Smart Corridor

Goal:
Reduce traffic congestion and improve network efficiency.

Measure M Program:
Stormwater (NPDES/MRP)

Goal:
Reduce countywide stormwater pollution.

Program Administration

Program Administration Overview

The Implementation Plan has allocated 5% of total revenues for Program Administration.

The Program Administration funding may be spent to cover routine program activities, as well as to implement actions to support the achievement of the program goals outlined above.

Any unused administration funds will be redistributed to the Local Streets and Roads according to the allocation calculation for that program's typical Measure M funding (identified the following Local Streets and Roads Section), and to the Countywide Programs through a competitive pilot process. C/CAG staff will develop the final scoring criteria for the Countywide Programs competitive pilot with input from Committees and the C/CAG Board.

Table 3-2. Program Administration Logic Framework

	Objectives	Performance Measures
Outcomes	• Achieve 80% or more of intended outcomes across all funding recipients	• Percentage of outcomes achieved by other programs (emphasizes the role of administration in programmatic success – this evaluation will review all other program areas based on a Yes or No (Y/N) for each objective being achieved or not)
Outputs	• Allocate full Measure M budget annually • Accurately track funding spent and/or rolled over annually	• Percentage of Measure M budget allocated • Accurate depiction of funding status for each recipient (Y/N)
Actions	• Receive VRF funds from DMV • Receive expenditure reports or confirmation of rollover from all funding recipients at least once a year • Receive performance measure reports from all funding recipients annually	• Receipt of DMV funds (Y/N) • Number of recipient reports received annually • Number of performance measure reports received annually
Inputs	• Spend, reallocate, or reserve all of allocated budget	• Percentage of Admin budget spent • Percentage of Admin budget re-allocated to other programs • Percentage of Admin budget reserved for future years

Local Streets and Roads

Local Streets and Roads Requirements

The Local Streets and Roads program will be allocated 50% of net revenue, which will be provided to local jurisdictions (20 cities and the county) for congestion mitigation and stormwater pollution mitigation programs.

Allocation will be on a cost reimbursement basis utilizing a distribution formula consisting of 50% population and 50% road miles for each jurisdiction modified for a minimum guaranteed amount of $75,000 for each jurisdiction. (Estimated allocations can be found in Exhibit A) Jurisdictions have the flexibility on use of the funds between the categories and projects; therefore, there are no requirements to split the funds evenly between the categories. **Table 3-3** lists approved uses for Measure M funds, but this list is non-exhaustive. Jurisdictions may use funding on additional programming or projects with C/CAG approval.

Allocations will be issued twice a year, once for the 1st half of the fiscal year (July – December) and once for the 2nd half (January – June). Jurisdictions have the option to wait until the 2nd half funds become available and submit one reimbursement request for the entire fiscal year.

Jurisdictions are required to report annually to C/CAG identifying total funds spent or reserved, actions taken, and outputs achieved as defined by the performance measures listed in **Table 3-4**. Measure M should not be used to supplant existing city general funds.

Table 3-3. Program Administration Logic Framework

Congestion Management	Approved local streets and roads funding uses
• Local shuttles/transportation • Road improvement/repaving • Installation/deployment of ITS components • Roadway operations, such as: restriping, signal timing/coordination, signage • Upgrade or replacement of traffic signals • Active transportation projects, such as: sidewalk maintenance/repair, bike lanes, bike lane maintenance/repair, crosswalks, Pedestrian Hybrid Beacons (PHB), Rectangular Rapid Flashing Beacons (RRFB), Safe Routes to School infrastructure	• Street sweeping • Storm inlet cleaning • Street side runoff treatment • Auto repair shop inspections • Small capital projects • Capital purchases for stormwater control measures (GSI/trash controls) • Oil dropoff locations • Fluid recycling programs • Pervious surface median strip installation • All other MRP compliance provisions/ activities, such as: trash pickup, operations and maintenance for green infrastructure facilities, other stormwater control measures in the ROW

Local Streets and Roads Objectives

All Local Streets and Roads objectives are annual unless otherwise noted.

Table 3-4. Local Streets and Roads Logic Framework

	Objectives	Performance Measures
Outcomes	• Reduce traffic congestion • Maintain roadways and roadway infrastructure, such as: green stormwater infrastructure, bike/ pedestrian infrastructure • Reduce amount of pollutants from stormwater runoff	• VMT reduced • Miles of roadway maintained • Pollutants avoided
Outputs	• Transport shuttle passengers • Improve miles/fractions of miles of road • Install/implement ITS components • Upgrade or replace traffic signal hardware or software units • Develop active transportation infrastructure, such as: Sidewalks, Bike lanes, PHBs, RRFBs • Sweep road miles • Clean storm inlets • Manage road runoff • Inspect auto repair shops • Implement small capital projects (related to traffic management and stormwater management) • Purchase pieces of equipment • Implement oil dropoff locations • Implement fluid recycling programs • Develop green stormwater infrastructure) • Perform MRP permit provisions/compliance activities	• Number of shuttle passengers • Miles of road improved • Number of ITS components installed • Number of traffic signal units installed/ replaced • Miles of sidewalks and bike lanes developed • PHBs or RRFBs installed • Miles of road swept • Number of storm inlets cleaned • Square-feet/acres of impervious areas managed for roadway runoff • Number of auto repair shops inspected • Number of capital projects completed • Number of capital purchases • Number of oil dropoff locations inspected • Number of fluid recycling programs provided • Volumes of stormwater managed • Number of green infrastructure projects developed • Other MRP permit actions undertaken
Actions	• Traffic Congestion Management activities undertaken • Stormwater Pollution Prevention activities undertaken • Reimbursement requests and annual report provided per C/CAG specifications	• Number of jurisdictions undertaking Traffic Congestion Management and Stormwater Pollution Prevention activities • % of jurisdictions that complete annual report
Inputs	• Spend, or confirm plan to save all of allocated Measure M budget	• % of allocated budget spent or confirmed to be saved

Countywide Programs

Countywide Programs Requirements

The Countywide Programs will be allocated 50% of net revenue, which will be provided to four designated programs as follows:

- Transit Operations/Senior Mobility - 18%
- Technology/Smart Corridor - 11%
- Safe Routes to School - 6%
- Stormwater (NPDES/MRP) - 15%

Allocation will be provided on a cost reimbursement basis.

Countywide Programs will be administered as outlined in **Table 3-5**.

Table 3-5. Countywide Program Administration Guidelines

	Program	Administration
	Transit Operations/Senior Mobility	Beyond the portion administered by SamTrans to support the Redi-Wheels program and other senior mobility efforts, proposed projects will be submitted to C/CAG annually for approval.
	Safe Routes to School	Administered by C/CAG. Funds will also be provided to County Office of Education (COE) as match for projects.
	Technology/Smart Corridor	Administered by C/CAG.
	Stormwater (NPDES/MRP)	Administered by C/CAG.

Countywide Programs Objectives

All Countywide Programs objectives represent the full 5-year period unless otherwise noted. The impacts of the COVID-19 pandemic have been considered in the development of these targets, but it is reasonable to expect annual targets may not be achieved in the first few years of this Implementation Plan.

Table 3-6. Transit Operations/Senior Mobility Logic Framework

	Objectives	Performance Measures
Outcomes	• Increase number of registered Redi-Wheels riders by 3% • Increase number of new riders by 3%	• Number of riders • Number of new riders
Outputs	• Provide base level of service at 10,000 revenue hours per year • Provide productive service, with at least 1.8 passengers served per hour on average* • Maintain at least 90% on time performance	• Number of revenue hours • Average number of passengers per hour • % on time performance
Actions	• Undertake at least 2 special projects that are not Redi-Wheels specific • Provide senior mobility activities: 12 events annually, 1 marketing material elements developed annually • Operate Redi-Wheels program and maintain compliance with ADA requirements • Provide annual report on time and per C/CAG specifications	• Number of special projects undertaken (not necessarily completed) in 5-year period • Number of senior mobility events held • Number of participants taking part in senior mobility events • Number of marketing material elements developed • ADA compliant (Y/N) • Annual report on time and per C/CAG's specifications (Y/N)
Inputs	• Spend or confirm reservation of all allocated budget	• % of program budget spent or confirmed as reserved for future years

*Numbers may lag in first few years of Implementation Plan as the Redi-Wheels program is recovering from COVID-19 related travel limitations.

Table 3-7. Technology/Smart Corridor Logic Framework

	Objectives	Performance Measures
Outcomes**	• Achieve at least 15% time savings in first hour after incident response signal timing is implemented • Achieve a 5% reduction in incident response time/system deployment • Achieve a 5% reduction in measured congestion caused by oversaturation of the arterial • Reduce average travel time and traveler delay along alternate routes by 5% • Reduce time to clear queues at oversaturated intersections along alternate route by 5% • Reduce amount of traffic filtering through local network by 5% • Increase percentage of time that Smart Corridor devices provide satisfactory flow by 5% • Increase volume throughput on the Alternate Route by 5%	• % time savings in first hour after incident response signal timing is implemented • % reduction in incident response time over baseline • % reduction in measured congestion over baseline* • % reduction in travel time by comparing time over baseline* • % reduction in time to clear queues over baseline* • % reduction in number of vehicles that use local roads as a pass-through rather than the intended route over baseline* • % increase in amount of time when system is active and Level of Service (LOS) is reported at level E or above* • % increase in vehicles traveling on a coordinated corridor using the designated route over baseline
Outputs	• Achieve 90% of planned Smart Corridor project coverage • Maintain 80% of Smart Corridor network connectivity • Ensure 90% of technology assets are in a state of good repair: At least 160 traffic signal controllers, At least 120 CCTV cameras, At least 50 electronic signs	• % of planned Smart Corridor project coverage achieved • % network downtime • Number of technology components maintained
Actions	• Install technology assets with new deployment: At least 20 traffic signal controllers, At least 15 CCTV cameras, At least 10 electronic signs • Undertake all necessary routine maintenance • Replace/Upgrade aging technology assets • Provide annual report on time and per C/CAG specifications	• Number technology components installed and replaced • Number of non-maintained ITS elements • Annual report on time and per C/CAG's specifications (Y/N)
Inputs	• Spend or confirm reservation of all allocated budget	• % of program budget spent or confirmed as reserved for future years

*Baseline to be determined through use of Streetlight Data as suggested in Norther Cities System Performance Evaluation Memo.

**Outcomes objectives only applicable if Smart Corridor is activated

Table 3-8. Safe Routes to School Logic Framework

	Objectives	Performance Measures
Outcomes	• Increase reported active mode share by 5% over 2019 baseline	• % active mode share reported through travel surveys
Outputs	• Support SRTS programs for at least 110 schools and 10 districts • Demonstrate 2 'high-need' school sites with SRTS programs	• Number of schools and districts with SRTS programs • Number of 'high-need' schools with SRTS programs
Actions	• Enroll 5 new schools into the SRTS Program annually • Host at least 40 encouragement events annually • Complete 40 bike and walk audits • Participate in 4 infrastructure projects • Conduct at least one survey per year with consistent methodology • Provide annual report on time and per C/CAG specifications	• Number of new schools enrolled • Number of encouragement events held • Number of bike and walk audits conducted • Number of infrastructure projects undertaken • Survey completed annually with consistent methodology from previous year (Y/N) • Annual report on time and per C/CAG's specifications (Y/N)
Inputs	• Spend or confirm reservation of all allocated budget • Secure Federal funding for 88.5% of SRTS program cost	• % of program budget spent or confirmed as reserved for future years • % program funding secured through Federal funds

Table 3-9. Stormwater (NPDES/MRP) Logic Framework

	Objectives	Performance Measures
Outcomes	• Demonstrate elimination of trash discharges from the storm drain systems into receiving waters by 90% by 2022 and 100% by 2025 • Demonstrate implementation of programs to reduce mercury and PCBs by managing at least 45 acres of impervious surface countywide via green stormwater infrastructure by 2027, and achieving compliance under PCBs and mercury load reduction requirements via all stormwater controls detailed in MRP for pollutant specific load reductions and stipulated loads reduced • Demonstrate improved operations and maintenance and achievement of asset management requirements for green stormwater infrastructure and other stormwater control measures in the public right-of-way as detailed in the MRP	• % of trash load reduction achieved by compliance benchmarks (90% reduction by June 30, 2022 and 100% reduction by June 30, 2025) • Acres greened per year (or associated water volume managed and PCBs/Mercury load reductions achieved)
Outputs	• Annual updates of pollutant load reduction (trash and other pollutants of concern) • Annual updates on creek conditions with respect to trash monitoring • Annual updates on GI implementation and maintenance • Updated trash generation and treatment maps • Educated and informed member agency staff and public	• Annual updates of load reduction (Y/N) • Annual updates on creek conditions with respect to trash monitoring (Y/N) • Annual updates on GI Implementation and maintenance (Y/N) • Updated trash generation and treatment maps (Y/N) • Representatives from all agency staff trained annually
Actions	• Host 4 Trash Subcommittee meetings per year • Host 3 meetings/workshops per year with the Litter Workshop • Complete 900 trash load assessments • Host 4 New and Redevelopment/Green Infrastructure subcommittee meetings per year • Host 1 GI training per year • Implement Green Streets Stewardship Pilot Program and host at least 2 stewardship events per year • Implement MRP requirements to develop asset management for green stormwater infrastructure and other stormwater control measures	• Number of Trash subcommittee meetings held annually • Number of Litter Workgroup meetings/ workshops held annually • Number of trash load assessments held • Number of New and Redevelopment/Green Infrastructure subcommittee meetings held annually • Number of GI trainings held annually • Number of GI facilities maintained through Green Streets Stewardship Pilot Program
Inputs	• Spend or confirm reservation of all allocated budget	• % of program budget spent or confirmed as reserved for future years

EXHIBIT A

The tables (right) provide an estimated distribution for the Local Streets and Roads allocation and the Countywide Programs allocation.

Jurisdiction	% of LS&R Allocation	Estimated Net Annual Revenue*	Estimated Net 5-Year Revenue*
Atherton	2.20%	$75,000	$375,000
Belmont	3.32%	$113,000	$565,000
Brisbane	2.20%	$75,000	$375,000
Burlingame	3.73%	$127,000	$635,000
Colma	2.20%	$75,000	$375,000
Daly City	9.54%	$325,000	$1,625,000
East Palo Alto	2.88%	$98,000	$490,000
Foster City	3.23%	$110,000	$550,000
Half Moon Bay	2.20%	$75,000	$375,000
Hillsborough	2.82%	$96,000	$480,000
Menlo Park	4.29%	$146,000	$730,000
Millbrae	2.85%	$97,000	$485,000
Pacifica	4.67%	$159,000	$795,000
Portola Valley	2.20%	$75,000	$375,000
Redwood City	9.33%	$318,000	$1,590,000
San Bruno	4.78%	$163,000	$815,000
San Carlos	4.08%	$139,000	$695,000
San Mateo	11.24%	$383,000	$1,915,000
South San Francsico	7.69%	$262,000	$1,310,000
Woodside	2.20%	$75,000	$375,000
San Mateo County	12.36%	$421,000	$2,105,000
Total	100.00%	$3,407,000	$17,035,000

Countywide Program	% of LS&R Allocation	Estimated Net Annual Revenue*	Estimated Net 5-Year Revenue*
Transit Operations/Senior Mobility	18%	$1,226,520	$6,132,600
Technology/Senior Mobility	11%	$749,540	$3,747,700
Safe Routes to School	6%	$408,840	$2,044,200
Stormwater (NPDES/MRP)	15%	$1,022,100	$5,110,500
Total	50%	$3,407,000	$17,035,000

*Estimation based on fiscal year 2019/20 revenue.

Notes:

1) The Local Streets and Roads program and Countyide Transportation Programs each receive 50% of net Measure M revenue. The top tabe to tthe right, indicates the percentage of Local Streets and Roads funding each jurisdiciton receives, rather than total percentage of all Measure M funding.

2) Local Streets and Roads program funding allocation is based on a formula consisting of 50% population and 50% road miles for each jurisdiction. Local jurisdictions are guaranteed a minimum amount of $75,000.

a. Road Miles Source: Caltrans Highway Performance Monitoring System 2019 Road Data released December 2020

b. Population Source: Population Estimates 2020 from California Department of Finance released May 2020

3) Figures may be slightly off due to rounding.

4) Assumes constant annual revenue over the 5-year Implementation period.

4

Conclusion

Conclusion

This strategic and implementation plan has been developed to capture lessons learned from the last ten years, and leverage opportunities to make improvements and enhancements as Measure M commences its second decade. Over the previous decade, Measure M has had a measurable impact on the county by funding a wide variety of programs directly linked to the legislative mandate, and supporting partners to deliver programs aligned with both local and countywide programming needs.Over the next five years C/CAG will build upon the strong foundation of the Measure M program, and modernize it toensure that it aligns with emerging needs and opportunities.

C/CAG and funding recipients will do this by implementing a set of strategic actions to advance the goals of the Measure M program, encourage innovation, and introduce streamlined data collection and evaluation that supports long-term demonstration of program impacts. In the coming months, the C/CAG team will take steps toward achieving the recommendations in this plan by:

- **Developing the program guidelines for the Countywide Transportation Program pilot program;**
- **Creating a set of reporting forms to collect standardized data from funding recipients;**
- **Beginning the process of outlining a future model for impact-based funding distribution among Countywide Programs; and**
- **Outlining the content and data needs for an online dashboard that will provide the public with information on the Measure M program's impact.**

The Modernizing Measure M Strategic and Implementation Plan will be evaluated in five years to inform the next five year implementation plan. In the meantime, C/CAG will work with their partners through regular engagement and collaboration to ensure the Vision of Modernizing Measure M is realized.

Appendices

Modernizing Measure M

C/CAG
City/County Association of Governments
of San Mateo County

Measure M Performance Assessment

A

Performance Assessment
June 2021

Measure M Performance Assessment

C/CAG
23892501

Performance Assessment
June 2021

Measure M Performance Assessment

Prepared by:

Steer
800 Wilshire Blvd, Suite 1320,
Los Angeles, CA 90017
USA

+1 (213) 425 0990
www.steergroup.com

Prepared for:

C/CAG
555 County Center, 5th Floor
Redwood City, CA 94063

23892501

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Appendices

A Measure M Local Streets and Roads Survey

Executive Summary

The Measure M program was approved by San Mateo County voters in 2010 to support local transportation projects and programs aimed at maintaining safe and clean roads, reducing congestion, and improving air quality. The program's current Implementation Plan, which guides funding allocation and outlines administrative processes, expires at the end of Fiscal Year 2021. In the process of developing the next Implementation Plan, C/CAG has undertaken a comprehensive review of the current program through a Performance Assessment.

The Performance Assessment introduces the concept of a Logic Framework, which is used to evaluate performance by highlighting strengths and weaknesses. Ultimately, the logic framework is used to demonstrate the program's impact toward its intended goals and outcomes. This tool will be valuable throughout the development of a new Implementation Plan for two reasons. First, it will help to identify performance measures that best demonstrates the program's impact. Second, it will lead to the discovery of actions that can be taken to improve upon those performance measures.

With the Logic Framework as a guide, the Performance Assessment reviews detailed allocation and expenditure data, and provides overviews of each of the programs receiving funding. Through the process of analyzing financial data and surveying and interviewing stakeholders receiving Measure M funding for their programs, the following key themes were identified:

1. Program flexibility supports successful investment of Measure M funds.
2. Measure M funding supports intended outcomes/goals with opportunities to expand impacts.
3. Measure M funding creates opportunities for larger projects and programs.
4. Standardizing performance indicators would more comprehensively demonstrate value of the Measure M program in future reviews.
5. Data and investment management practices could improve to better trace the impact of Measure M funding.
6. Reporting and invoicing processes could be augmented to support timely data collection and demonstration of impact.

As the process of developing the upcoming Implementation Plan continues, these themes will be explored in more detail. They will be used to support the development of formal goals, objectives and performance measures, to recommend strategic updates to the Measure M program, and to inform the Implementation Plan itself.

1 Introduction

1.1 Measure M Overview

Utilizing an annual $10 vehicle registration fee (VRF) on motor vehicles registered in San Mateo County, C/CAG's **Measure M program** delivers programs that maintain local roads, improve access to transportation options, decrease congestion and reduce water pollution from vehicle runoffs. Measure M was approved by voters in 2010 for a 25-year period, with the expectation that the program would generate roughly $6.7 million annually in program funding.

Every five years, C/CAG develops a Five-Year Implementation Plan, to be approved by the C/CAG Board. The Implementation Plan designates approved projects and programs to receive Measure M funding allocation throughout the next five-year period. The current Implementation Plan was published in May 2016 covering the Fiscal Years 2016/17-2020/21. C/CAG is in the process of developing the next Strategic Implementation Plan, covering Fiscal Years 2021/22-2025/26.

1.2 Performance Assessment

As part of the development of the upcoming Fiscal Years 2021/22-2025/26 Five-Year Implementation Plan, Steer has been commissioned to prepare an evaluation of the current Measure M Program. This document provides an overview and initial performance assessment of the Measure M program, with data available as of October of 2020. The assessment outlines allocations and expenditures across the various programs through Fiscal Year 2019/20, and evaluates the impact and successes these programs have had.

The information presented below was compiled through review of historical data and reports, a series of interviews with C/CAG staff and Countywide Program managers, and the distribution of a survey to representatives from each of the jurisdictions. The survey provided to jurisdictions has been included in Appendix A.

This document is structured as follows:

- **Chapter 1: Introduction** introduces Measure M and this document.
- **Chapter 2: Measure M Background** provides an overview of the Measure M program.
- **Chapter 3**: **Logic Framework** introduces the concept of a logic framework and outlines how it will be used to evaluate and support Measure M strategic planning moving forward.
- **Chapter 4: Revenues and Expenditures** provides an overview of allocation and actual spending across the Countywide Programs and by the 21 jurisdictions in San Mateo County
- **Chapter 5: Projects and Programs** describes in more detail each of the recipients of Measure M funding (including Administration, Local Streets and Roads, and the four Countywide Transportation Programs).

Chapter 6: Observations and Next Steps provides a summary of key themes and outlines the remainder of the expected process toward developing the FY 2022-2026 five-Year Implementation Plan

2 Measure M Background

2.1 Overview

This section provides a concise background review of the Measure M program, including a summary of the key programs and projects that are evaluated in later chapters of this report. It includes:

- **Measure M Funding Allocation –** an overview of how contributions are made overall across the program
- **Countywide Transportation Programs –** a summary of the 2017-2020 funding program for the Countywide Transportation Programs
- **Local Streets and Roads -** a summary of the 2017-2020 funding program for local streets and roads

2.2 Measure M Funding Allocation

Measure M's Expenditure Plan (included in an Attachment to the full Measure M legislation text) outlines the recipients of the money collected through the annual VRF. Of importance, the expenditures must align with the regional transportation plan, and must demonstrate benefit to the persons paying the VRF.

To that end, the Expenditure Plan dictates that 5% of the annual funding is allocated to support program administration. Of the remaining revenue, 50% should be distributed between four designated Countywide Transportation Programs, including:

- Transit Operations including Senior and Disabled Services (referred to as *Transit Operations and Senior Mobility* based on Measure M legislative description)
- Safe Routes to School
- Regional Traffic Congestion Management (referred to as *Technology and Smart Corridor* based on Measure M legislative description)
- Water Pollution Prevention Program (referred to as *Stormwater – National Pollutant Discharge Elimination System/Municipal Regional Permit* based on Measure M legislative description).

The other 50% should support local streets and roads maintenance for the twenty cities and San Mateo County.

Within those designations, an Implementation Plan may provide further guidance on approved or allowed expenditures. The current Fiscal Years 2016/17-2020/21

Implementation Plan allows funding to be spent in a variety of ways, allowing decisions to be made by the jurisdictions and Countywide Transportation Program managers.

2.3 Countywide Transportation Programs

The Expenditure Plan outlines that four Countywide Transportation Programs should receive Measure M Funds. The Fiscal Years 2016/17-2020/21 Implementation Plan outlines how funds are allowed to be spent (programs are not listed in order of significance):

- **Transit Operations and Senior Mobility**: Measure M may be used to fund SamTrans' senior mobility program, including senior mobility education, and other senior mobility management programs like van sharing. Additionally, funding may be directed to paratransit operations (currently realized through the Redi-Wheels program).
- **Safe Routes to School**: Safe Routes to School (SRTS) promotes safe walking, bicycling, carpooling and other non-single occupancy vehicle modes of travel for students and parents in San Mateo County. The program is administered by C/CAG and managed by the County Office of Education. Measure M funds may be used for both infrastructure and non-infrastructure SRTS projects, including use as a local match for projects funded through outside grants.
- **Technology and Smart Corridor**: The Intelligent Transportation System (ITS) and Smart Corridor program deploys projects with regional and countywide significance aimed at congestion reduction. Measure M funds may be spent on expansion of the Smart Corridor, and maintenance and operation of Smart Corridor specific equipment located within the San Mateo County jurisdictions' right of way.
- **Stormwater (NPDES/MRP)**: The Stormwater Program supports C/CAG member agencies in complying with requirements to reduce pollution in stormwater runoff contained in the Municipal Regional Permit (MRP), a National Pollutant Discharge Elimination System (NPDES) permit issued by the San Francisco Bay Regional Water Quality Control Board . Measure M may be used to support pollution reduction programs designed to support MRP compliance activities.

2.4 Local Streets and Roads

In addition to the four countywide programs noted above, jurisdictions directly receive funding for local streets and roads. This funding may be used to support programs and projects related to Traffic Congestion Management and Stormwater Pollution Prevention.

Within each of the programs, there is also a good deal of flexibility in how funding may be spent, with the only restriction being that funds should not be used to supplant city general funds. The current Fiscal Years 2016/17-2020/21 Implementation Plan provides a list of approved programs within each category, outlined below in Table 2-1.

Table 2-1: Local Streets and Roads Allocations

Traffic Congestion Management	Stormwater Pollution Prevention
• Local Shuttles/Transportation • Road resurfacing/reconstruction • Deployment of local ITS • Roadway operations • Replacement and/or upgrading of traffic signal hardware or software	• Street Sweeping • Roadway storm inlet cleaning • Street side runoff treatment • Auto repair shop inspections • Managing runoff from street/parking lot • Small capital projects such as vehicle related runoff management/controls • Capital purchases for motor related runoff management/controls • Additional used oil drop off locations • Motor vehicle fluid recycling programs • Installation of new previous surface median strips in roadways • Municipal Regional Permit compliance activities

3 Logic Framework

3.1 Overview

This chapter provides a summary of the logic framework developed for use in the five year strategy development process. This evaluation framework is 'aspirational' and reflects the range of data required for a robust evaluation of the program at the end of the next five year Implementation Plan. This framework has been applied to existing data to illustrate its use and identify gaps to fill during the strategic development process.

3.2 Logic Framework Introduction

As Measure M funding is distributed to a variety of programs and jurisdictions, it is useful to establish a framework by which to assess the Measure M program overall. The framework allows us to identify where programs can clearly demonstrate impact toward their goals and objectives, as well as where those ties may be less apparent. These instances may indicate a lack of data, or highlight areas where there are opportunities to evolve within the program. To this end, a logic framework has been established, which includes the following elements:

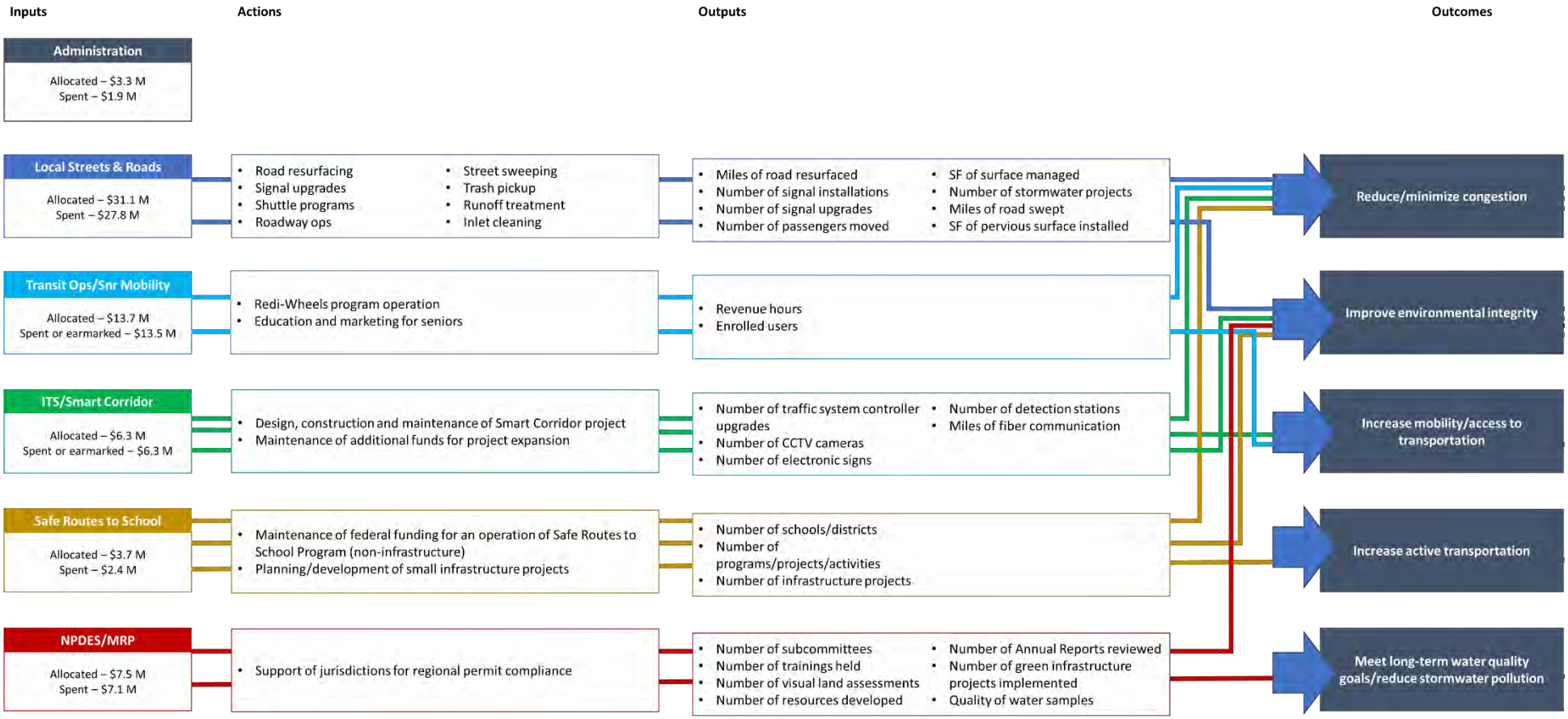
- **Inputs**: The resources required to operate the program. In this case, programmatic inputs highlight Measure M funding allocation and spending for each of the programs, as well as the percent of each program's budget that Measure M represents.
- **Actions**: The work program recipients are undertaking with the funding. For the purpose of clarity and ease of understanding, actions have been summarized rather than listed in full.
- **Outputs**: Measurable performance indicators from the program. These often relate to quantifying the actions identified
- **Outcomes**: Stated objectives or goals of the program. Outcomes generally demonstrate wider benefits realized.

By utilizing the logic framework, we seek to answer the following questions:

- What **inputs** are required to implement projects or programs?
- What **actions** are being taken by funding recipients? Have they aligned with the desired outcome or overall goals?
- What measurement **outputs** have been recorded? What do they communicate about the overall success of their projects or programs?
- What were the project or program's desired goals and **outcomes**? Were they achieved?

3.3 Proposed Logic Framework

The Measure M Logic Framework is presented in Figure 3.1 **Error! Reference source not found.**on the following page, providing a high-level view of how each of the programs could each be evaluated. As is demonstrated in more detail throughout the course of this document, clear information is collected on inputs, actions, and outcomes related to Measure M programming. However, the program would benefit from improved collection of outcome focused measurement in order to clearly demonstrate Measure M's impact toward its overall goals


Inputs
Actions
Outputs
Outcomes
Administration
Allocated – $3.3 M
Spent – $1.9 M
Local Streets & Roads
Allocated – $31.1 M
Spent – $27.8 M
Road resurfacing
Signal upgrades
Shuttle programs
Roadway ops
Street sweeping
Trash pickup
Runoff treatment
Inlet cleaning
Miles of road resurfaced
Number of signal installations
Number of signal upgrades
Number of passengers moved
SF of surface managed
Number of stormwater projects
Miles of road swept
SF of pervious surface installed
Transit Ops/Snr Mobility
Allocated – $13.7 M
Spent or earmarked – $13.5 M
Redi-Wheels program operation
Education and marketing for seniors
Revenue hours
Enrolled users
ITS/Smart Corridor
Allocated – $6.3 M
Spent or earmarked – $6.3 M
Design, construction and maintenance of Smart Corridor project
Maintenance of additional funds for project expansion
Number of traffic system controller upgrades
Number of CCTV cameras
Number of electronic signs
Number of detection stations
Miles of fiber communication
Safe Routes to School
Allocated – $3.7 M
Spent – $2.4 M
Maintenance of federal funding for an operation of Safe Routes to School Program (non-infrastructure)
Planning/development of small infrastructure projects
Number of schools/districts
Number of programs/projects/activities
Number of infrastructure projects
NPDES/MRP
Allocated – $7.5 M
Spent – $7.1 M
Support of jurisdictions for regional permit compliance
Number of subcommittees
Number of trainings held
Number of visual land assessments
Number of resources developed
Number of Annual Reports reviewed
Number of green infrastructure projects implemented
Quality of water samples
Reduce/minimize congestion
Improve environmental integrity
Increase mobility/access to transportation
Increase active transportation
Meet long-term water quality goals/reduce stormwater pollution

4 Revenues and Expenditures

4.1 Overview

This chapter provides a brief financial overview of the Measure M program from its inception through Fiscal Year (FY) 19-20. It outlines:

- The amount of **revenue** accrued from Vehicle Registration Fees
- The funding **allocation** across the jurisdictions and Countywide Programs
- The **expenditure** demonstrated across all recipients.

Note: Measure M revenues and expenditures are presented on a fiscal year (FY) basis. C/CAG's fiscal year runs from July 1st through June 30th each year.

4.2 Revenue

Through FY 19-20, over $66 million has been collected with Measure M, exceeding projected revenues of just over $60 million during this period based on an initial estimation of $6.7 million per year.

Revenue variations from plan are typically explained by changes in number of vehicles registered in San Mateo County. Notably, Measure M revenues grew 6% between FY 17-18 and FY 18-19 due to accumulated interest .

Annual revenue data is presented in

Table 4-1: Measure M Annual Revenue through FY 19-20

Revenue	FY 11-12	FY 12-13	FY 13-14	FY 14-15	FY 15-16	FY 16-17	FY 17-18	FY 18-19	FY 19-20	Total to date
Total VRF Collected	7,981,296	6,849,938	6,981,050	7,155,362	7,252,769	7,474,865	7,517,638	7,774,301	7,189,349	66,176,567
DMV fees	(59,063)	(3,425)	(3,491)	(3,578)	(3,626)	(3,737)	(3,759)	(3,887)	(3,595)	(88,161)
Total to C/CAG	7,922,234	6,846,838	6,977,886	6,580,544	7,821,283	7,471,128	7,513,879	7,770,413	7,185,755	66,089,959
Interest	24,342	15,403	45,226	26,711	28,843	53,963	122,736	341,951	354,857	1,041,742
Total Revenue	**7,946,576**	**6,862,241**	**7,023,112**	**6,607,255**	**7,850,126**	**7,525,091**	**7,636,615**	**8,112,364**	**7,540,612**	**67,131,701**

4.3 Allocation

Of the $676 million collected with Measure M, over $66 million has been allocated to programs and projects in San Mateo County. On average, $3.5 million a year is allocated to jurisdictions for Traffic Congestion Management and Stormwater Pollution Prevention, and $3.5 million a year is allocated to the four Countywide Transportation Programs:

- Transit Operations and Senior Mobility
- Safe Routes to School
- Technology and Smart Corridor
- Stormwater (NPDES/MRP)

While the Expenditure Plan dictates that, after the 5% administration allocation, 50% of the funding must go to the jurisdictions for the Local Streets and Roads program and 50% must go to the four Countywide programs, the allocation within those categories can vary. Allocation to each category is determined every five years through the Five-Year Implementation Plan, however, the allocation process has remained the same since 2011 when Measure M was approved.

The Local Streets and Roads allocation is based on a formula consisting of 50% population and 50% local road miles, with a guaranteed minimum allocation of $75,000 for each jurisdiction.

The Countywide programs have each been allocated a set percentage of their total pot, outlined in Table 4-2, based on anticipated programmatic need at the time when the program was established.

Table 4-2: Current Countywide Transportation Program Funding Allocation

Program	% of Countywide Program Allocation
Transit Operations and Senior Mobility	22%
Safe Routes to School	6%
Technology and Smart Corridor	10%
Stormwater (NPDES/MRP)	12%

The full annual allocation of Measure M funds through FY 19-20 is demonstrated in Table 4-3.

Table 4-3. Allocation by Program

Allocation by Program	FY 11-12*	FY 12-13	FY 13-14	FY 14-15	FY 15-16	FY 16-17	FY 17-18	FY 18-19	FY 19-20	Total to date
Program Administration (5%)	396,112	342,342	348,894	329,027	391,064	373,556	375,694	388,521	359,288	3,304,498
One-time County Assessors Election Costs	549,527									549,527
Total Allocated to Programs after Program Administration Allocation	6,976,595	6,504,496	6,628,991	6,251,517	7,430,218	7,097,572	7,138,185	7,381,892	6,826,467	**62,235,934**
Local Streets and Roads (50%)	3,488,298	3,252,248	3,314,496	3,125,758	3,715,109	3,548,786	3,569,092	3,690,946	3,413,233	31,117,967
Countywide Transportation Programs (50%)										
Transit Operations/Senior Mobility Program (22%)	1,534,851	1,430,989	1,458,378	1,375,334	1,634,648	1,561,466	1,570,401	1,624,016	1,501,823	13,691,905
ITS/Smart Corridor (10%)	697,660	650,450	662,899	625,152	743,022	709,757	713,818	738,189	682,647	6,223,593
Safe Routes to School (6%)	418,596	390,270	397,739	375,091	445,813	425,854	428,291	442,914	409,588	3,734,156
Stormwater Program (12%)	837,191	780,539	795,479	750,182	891,626	851,709	856,582	885,827	819,176	7,468,312
Total Allocation (incl. Program Administration and One-time County Assessors Election Costs)	**7,922,234**	**6,846,838**	**6,977,886**	**6,580,544**	**7,821,283**	**7,471,128**	**7,513,879**	**7,770,413**	**7,185,755**	**66,089,959**

**FY 11-12 includes allocation from February to June 2011 (FY 10-11) revenues as well*

**Interest is not included in the allocation*

4.4 Expenditure

Since inception, 81% of the allocated money has been spent by jurisdictions and Countywide Transportation Programs. Currently, unspent money is carried over into future years and reserved for the jurisdiction or program to which it was initially allocated.

Some programs, like the ITS/Smart Corridor program, have program expenditures that may be larger than their annual allocation. Thus, the program may save their funding for a few years until they have enough to cover their needs. Similarly, some of the jurisdictions with smaller allocations prefer to save their allocation until they have enough to make larger purchases.

Numerical data on expenditure across the Measure M program is presented in Table 4-4 and further detail on the projects and programs supported by Measure M funding is outlined in Chapter 5. Of note, this table does not include funds that have been earmarked but not spent directly.

Table 4-4: Measure M Annual Expenditure through FY 19-20

Expenditures by Program	FY 11-12	FY 12-13	FY 13-14	FY 14-15	FY 15-16	FY 16-17	FY 17-18	FY 18-19	FY 19-20	Total to date
Program Administration	559,272	59,282	214,600	167,407	253,479	232,969	125,205	112,759	189,637	1,914,610
County Assessors Election Costs	549,527									549,527
Local Streets and Roads	**1,424,534**	**3,130,611**	**2,942,828**	**2,986,210**	**3,297,477**	**3,698,698**	**3,431,914**	**3,357,538**	**3,555,401**	**27,825,211**
Traffic Congestion	844,773	1,925,539	1,776,742	1,485,436	1,942,307	1,954,318	1,451,442	1,958,210	1,498,711	14,837,478
Stormwater Pollution Prevention	579,761	1,205,072	1,166,086	1,500,774	1,355,170	1,744,380	1,980,472	1,399,328	2,056,690	12,987,733
Countywide Transportation Programs	**1,654,943**	**2,619,403**	**3,201,914**	**2,641,093**	**2,978,191**	**3,477,868**	**2,639,659**	**2,506,950**	**2,544,910**	**24,264,931**
Transit Ops/Senior Mobility	1,400,000	1,400,000	1,400,000	1,110,365	1,689,635	1,400,000	1,833,875	1,401,033	1,405,801	13,040,709
ITS/Smart Corridor	-	-	500,000	200,000	200,000	802,349	59	-	-	1,702,408
Safe Routes to School	254,943	311,792	329,831	329,863	219,471	310,138	136,092	138,847	373,103	2,404,080
Stormwater Program	-	907,611	972,083	1,000,865	869,085	965,381	669,633	967,070	766,006	7,117,734
Total Expenditure	**3,638,749**	**5,809,296**	**6,359,342**	**5,794,710**	**6,529,147**	**7,409,535**	**6,196,778**	**5,977,247**	**6,289,948**	**54,004,752**

5 Projects and Programs

5.1 Overview

This Chapter provides an in-depth description of each of the programs that receive Measure M funding, including:

- Administration
- Local Streets and Roads
- Transit Operations including Senior and Disabled Services
- Safe Routes to School
- Regional Traffic Congestion Management (ITS and Smart Corridor)
- Water Pollution Prevention Program.

For each program, the chapter includes a **program description** of the activities or projects realized, a **funding overview**, describing Measure M's role within the program, a description of **metrics** collected by each program, and a representation of each program within the **logic framework** introduced above.

5.2 Administration

5.2.1 Program Description

Administration funds are used for program management and administration activities, such as staff time for invoicing and reporting. Though not the case for all of the Countywide Programs, the Administration funds do support some of the administrative staff time for the Stormwater Pollution Prevention program team.

C/CAG receives funds from the DMV monthly based on the actual number of vehicle registrations in the county, which determine the allocation of Measure M across its funding recipients.

5.2.2 Funding Overview

Administration receives 5% of the total Measure M allocation. Of the $3.3 million allocated for Administration (including election-related costs from FY 10-11), 58% has been spent on admin activities. Per the 2017-2021 Implementation Plan, unexpended allocation of program administration funds will be reallocated to the jurisdictions and four Countywide Transportation Programs in future years. In April 2020, the C/CAG Board approved Resolution 20-09 authorizing the reallocation of the accumulated interest and

unspent administration fund from inception through FY 18-19 to the Local Streets and Roads and the four Countywide Transportation Programs using the allocation percentages in the current Implementation Plan. The additional fund will be available to the programs in FY 20-21. The reallocation is summarized in Table 5-1 below.

Table 5-1. Reallocated Interest from FY 2020

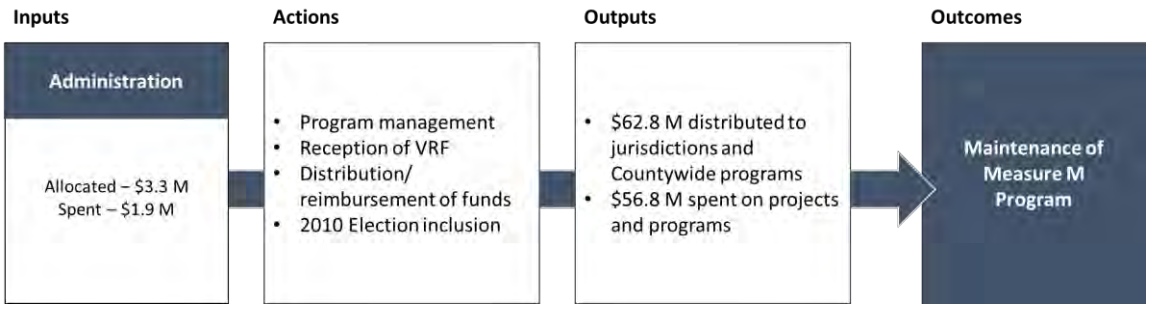
Interest Balance		$686,885.00
Administration Balance		$1,220,237.20
Total Available to Reallocate		**$1,907,122.20**
Reallocation to Programs		
Local Streets and Roads	50%	$953,561.10
Countywide Transportation Programs		
Transit Operations/Senior	22%	$419,566.88
ITS / Smart Corridor	10%	$190,712.22
Safe Routes to School	6%	$114,427.33
Stormwater	12%	$228,854.66
Total Reallocated to Programs		**$1,907,122.20**

5.2.3 Metrics

C/CAG tracks project and program expenditure through invoices from jurisdictions and Countywide Program administrators requesting reimbursement for approved services. Staff working with each of the Countywide Programs report varying levels of information on annual performance measures. Jurisdictions receiving funds through the Local Streets and Roads program report specific metrics listed in the reimbursement request form, however C/CAG has not used those metrics to make funding allocation decisions for the 50% local distribution since that was voter approved.

The evaluation framework for this section of the program is defined in Figure 5-1.

Figure 5-1. Administration Logic Framework



5.3 Local Streets and Roads

5.3.1 Program Description

Funds for the Local Streets and Roads program are allocated twice a year for projects related to traffic congestion management and stormwater pollution prevention. Once funds are expended, local jurisdictions are reimbursed for their expenses. Jurisdictions also have the option of getting the whole fiscal year allocation reimbursed once per year.

Jurisdictions are able to spend their Measure M allocation on a variety of projects and programs related to Traffic Congestion Management and Stormwater Pollution Prevention. The previous Implementation Plan required that funding be split evenly across the two, but the current Plan allows jurisdictions to spend their Measure M funds across both categories as they see fit.

In September 2020, a survey was distributed to each of the jurisdictions in San Mateo County. Responses were received from each of the twenty cities and towns (not including the County itself, though they have been interviewed subsequently to ensure their feedback is included in the process of developing the next Implementation Plan). Much of the information below is based on the survey responses received.

With the choice of using their funding on either (or both) of the Traffic Congestion Management or Stormwater Pollution Prevention categories, most jurisdictions reported that they do utilize both. Road Resurfacing and Street Sweeping were noted as the most popular expenditures from each of the two categories respectively. However, the Measure M program allows jurisdictions to spend their funding flexibly, and jurisdictions reported a variety of other uses demonstrated below in Figure 5-2 and Figure 5-3.

Figure 5-2. Local Streets and Roads Expenditures - Traffic Congestion Management (20 Responses)

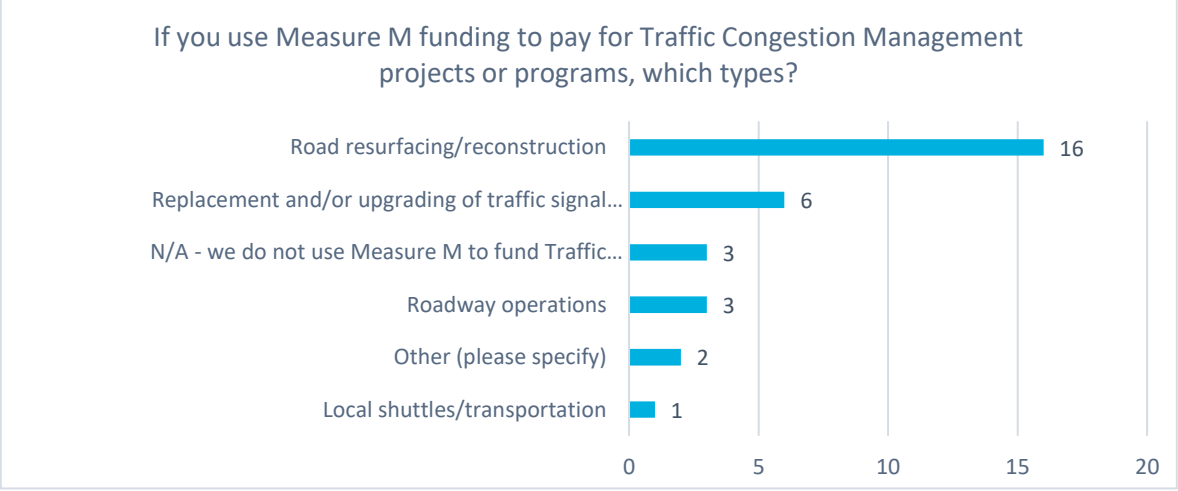
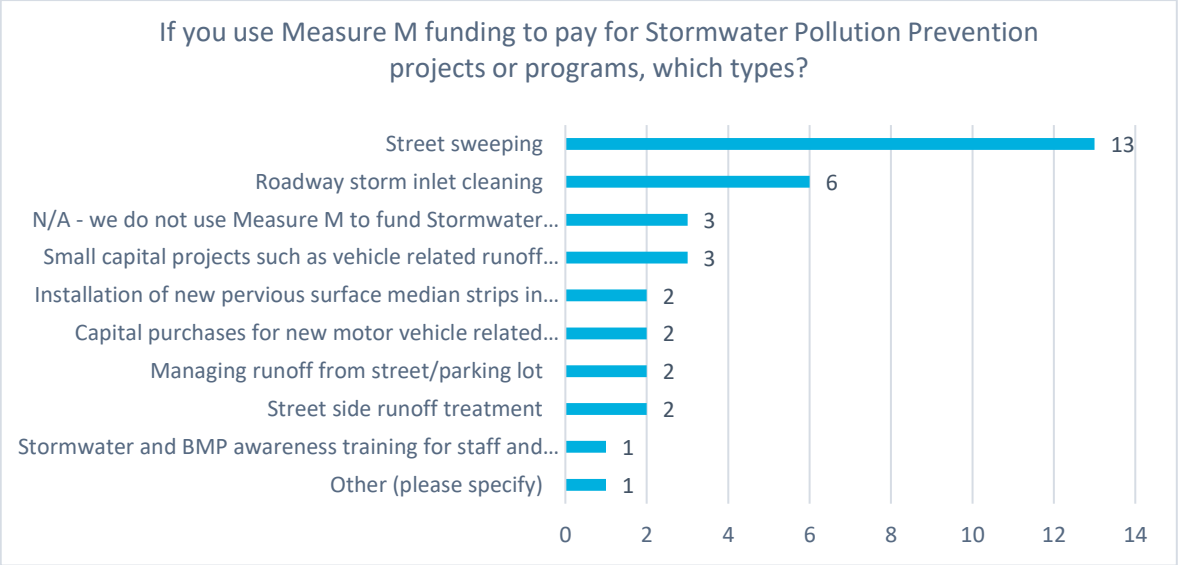


Figure 5-3. Local Streets and Roads Expenditures - Stormwater Pollution Prevention (20 Responses)



While most jurisdictions are reimbursed for projects or parts of projects they undertake with their own funds, Measure M funds are also allowed to be used as local matches to secure outside funding. Only four jurisdictions indicated that they had used their Measure M allocations in that capacity, but ten additional jurisdictions indicated that they might be interested in doing so in the future.

5.3.2 Funding Overview

Funding allocation and expenditure

The Local Streets and Roads program receives 50% of net Measure M funding, and it is allocated across all 21 jurisdictions based on their total population and miles of surface road, while reserving at least a $75,000 minimum for each jurisdiction. Jurisdictions cover their costs in advance, and submit invoices to C/CAG for reimbursement.

Through FY 18-19, Measure M has allocated $27.7 million in total to the 21 jurisdictions, of which $24.2 million has been spent[1]. Through FY 18-19, over $14 million, or just under 52% of the total amount reimbursed to jurisdictions has projects in the Traffic Congestion Management category, and just over $12 million, or 44%, has funded programs and projects within the Stormwater Pollution Prevention category.

Table 5-2: below shows the total allocation and expenditure by jurisdiction for local streets and roads through FY 18-19.

[1] *Full expenditure data for Local Streets and Roads program not yet available for FY 19-20, so data above and in Figure 5-2 reflects total through FY 18-19.*

Table 5-2: Local Streets and Roads Allocation and Expenditure by Jurisdiction through FY 18-19[2].

Jurisdiction	Allocation	Traffic	Stormwater	Total	% Spent
Atherton	631,728	538,242	93,485	631,728	100%
Belmont	916,664	517,275	399,388	916,663	100%
Brisbane	631,728	220,728	357,600	578,328	92%
Burlingame	1,102,051	502,384	599,666	1,102,050	100%
Colma	631,728	117,606	210,445	328,051	52%
Daly City	2,660,374	2,660,377	-	2,660,377	100%
East Palo Alto	842,521	64,709	208,582	273,291	32%
Foster City	869,451	827,159	42,291	869,451	100%
Half Moon Bay	631,728	465,951	83,570	549,521	87%
Hillsborough	784,758	720,663	67,567	788,230	100%
Menlo Park	1,262,236	467,821	794,416	1,262,236	100%
Millbrae	759,919	37,606	722,312	759,919	100%
Pacifica	1,332,161	420,070	911,714	1,331,785	100%
Portola Valley	631,728	340,629	51,110	391,739	62%
Redwood City	2,476,900	164,409	2,312,491	2,476,900	100%
San Bruno	1,320,478	688,128	588,127	1,276,255	97%
San Carlos	1,118,025	871,625	246,401	1,118,026	100%
San Mateo	3,080,530	1,908,726	1,171,804	3,080,530	100%
South San Francisco	1,990,783	1,664,527	326,256	1,990,783	100%
Woodside	631,728	590,541	41,187	631,728	100%
San Mateo County	3,396,775	496,422	2,900,353	3,396,776	100%
	27,703,992	**14,285,597**	**12,128,766**	**26,414,363**	

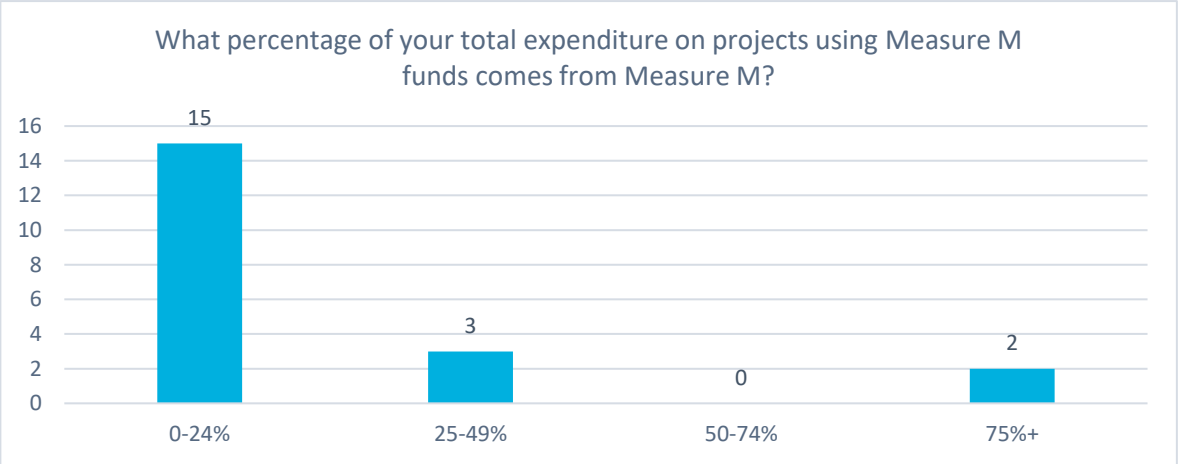
According to the Local Streets and Roads survey responses, most jurisdictions did not report any issues with spending allocated funding, although some pointed to challenges with timing of projects making it difficult to ask to reimbursements on time, or specific concerns related to the COVID-19 pandemic.

Some jurisdictions indicated that, rather than spend their allocated funding annually, they prefer to save the funding to be used on larger capital projects or purchases.

While Measure M funding is a valuable resource for jurisdictions' Traffic Congestion Management and Stormwater Pollution Prevention activities, it typically accounts for only a portion of the overall cost of the projects it supports. According to the Local Streets and Roads Survey responses, almost all jurisdictions reported that Measure M accounts for less than 50% of the total cost of the projects for which they use the funds, and most (15 jurisdictions) reported that Measure M accounts for less than 25%.

[2] Due to rounding, totals may be slightly off from totals listed elsewhere in this report.

Figure 5-4: Percentage of funding coming from Measure M (20 responses)



5.3.3 Metrics

On their reimbursement request forms, C/CAG requires jurisdictions to report performance measures related to their Measure M expenditures. Some of the requested data include:

- Performance Measure
- Total Project Cost
- Total Project Quantity
- Period of performance (as applicable)

C/CAG provides a list of measures to the jurisdictions to guide their responses, shown below in Figure 5-5.

Figure 5-5. Performance Measures Designated by C/CAG

Traffic Congestion Management	
Projects	***Performance Measure***
• Local shuttles/transportation	• Number of passengers transported.
• Road resurfacing/reconstruction	• Miles/fraction of miles of roads improved.
• Deployment of Local Intelligent Transportation Systems (ITS)	• Number of ITS components installed/ implemented.
• Roadway operations such as: Restriping, Signal timing/coordination, Signage	• Miles/fraction of miles of roads improved.
• Replacement and/or upgrading of traffic signal hardware and/or software	• Number of units replaced and/or upgraded.

Stormwater Pollution Prevention	
Projects	***Performance Measure***
• Street sweeping	• Miles of streets swept an average of once a month.
• Roadway storm inlet cleaning	• Number of storm inlets cleaned per year.
• Street side runoff treatment	• Square feet of surfaces managed annually.
• Auto repair shop inspections	• Number of auto repair shops inspected per year.
• Managing runoff from Street/Parking lot impervious surfaces	• Square feet of surfaces managed annually.
• Small capital projects such as vehicle wash racks for public agencies that include pollution runoff controls	• Number of projects implemented.
• Capital purchases for motor vehicle related runoff management and controls	• Number of pieces of equipment purchased and installed.
• Additional used oil drop-off locations	• Number of locations implemented and operated, and quantity of oil collected.
• Motor vehicle fluid recycling programs	• Number of programs implemented and operated, and quantity of fluids collected.
• Installation of new pervious surface medium strips in roadways	• Square footage of new pervious surface medium strips installed.
• Municipal Regional Permit Compliance Activities	• Identification of permit provision(s) and compliance activities performed

Performance measures reported to C/CAG are provided in a variety of formats, scales, and time periods, depending on the reporting jurisdiction. This can lead to challenges for C/CAG to compile an accurate account of performance measures met across the program as a whole.

While consistent cross-jurisdictional information is unavailable, totals of some of the most common performance measures received demonstrate the impact of the Local Streets and Roads Program are provided in Table 5.2.

Table 5-3: Performance Measures Reported by Jurisdictions

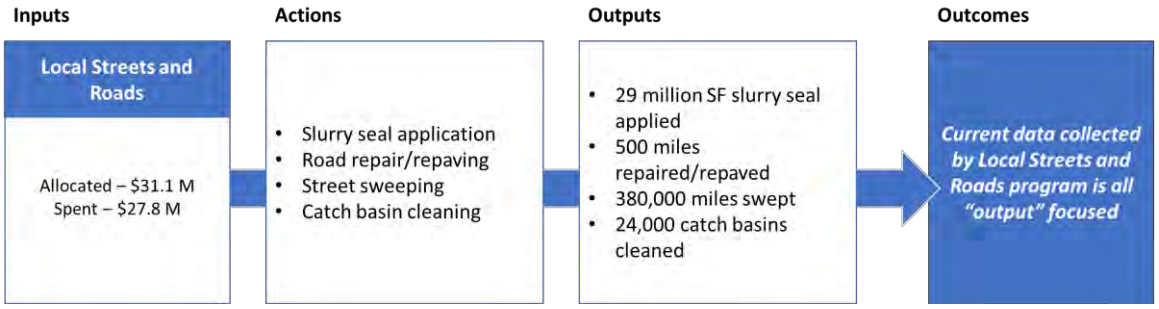
Performance Measure	Outcomes Reported by Jurisdictions
Slurry seal applied	29 million square feet
Roads repaired or repaved	500 miles
Roads swept	380,000 miles
Catch basins cleaned	24,000 catch basins

In response to the Local Streets and Roads survey, none of the jurisdictions indicated that they spend more than four hours per week on data collection and monitoring of Measure M-funded projects or programs. A majority of respondents (12) indicated that they spend between zero and two hours collecting data, and six respondents indicated that they dedicate no time at all for data collection.

Although this data is collected by the jurisdictions, C/CAG does not keep track of this data in their database consistently. The reimbursement forms are submitted in PDF format, and compiling data from previous years in order to review long-term impact would be time consuming and would likely require additional back and forth with jurisdictions to 'right size' metric labels and categories.

The sample evaluation framework for this section of the program is defined in Figure 5-6.

Figure 5-6. Local Streets and Roads Logic Framework



5.4 Transit Operations and Senior Mobility

5.4.1 Program Description

The Transit Operations program is managed by the San Mateo County Transit District (SamTrans). Funding is used for senior mobility programs, including paratransit service (which supports seniors and persons with disabilities).

The allocation has primarily supported the Redi-Wheels program, a fixed-route paratransit service for persons with disabilities who cannot independently use regular SamTrans bus service. The Redi-Wheels program allows riders to schedule rides by phone, either on a one-time basis or through a 'subscription' for regular service. All types of trips are eligible, including those deemed 'non-essential' such as shopping, visiting friends, or hair appointments.

Outside of Redi-Wheels, the Senior Mobility Program actively encourages and educates the use of traditional transit among seniors by providing information and assistance to older adults. In addition, the Senior Mobility Program advocates for pedestrian improvements that promote safe walking areas for seniors. The general goal of this program is to increase ridership for seniors, people with disabilities, and veterans, while providing quality service. C/CAG's latest funding agreement with the San Mateo County Transit District (SamTrans) from July 2020 lists recommended strategies for inclusion in the Senior Mobility Program:

- Subsidized ride sourcing pilot program with smartphone application booking
- Improve and increase awareness of mobility ambassador and veteran's mobility corps program
- Mobile accessible travel training bus
- Flexible-route Community Transit Service
- Other innovative services/programs

While the Expenditure Plan dictates that the Transit Operations program must include Senior and Disabled Services, it does not dictate that the full expenditure be used this way. Recently, Transit Operations funds were used to supplement the funding C/CAG received from Metropolitan Transportation Commission (MTC) to update two of the County's Community-Based Transportation Plans (CBTP).

5.4.2 Funding Overview

The Transit Operations program receives 22% of the net Measure M allocation. Measure M has allocated $13.8 million to the Redi-Wheels and Senior Mobility programs through FY 19-20. An amount of $13 million has been spent, equivalent to 94%.

For administrative purposes, C/CAG and SamTrans have agreed that SamTrans would receive 22% of the net Measure M allocation, which is estimated to be$1.4 million annually, although the actual allocation has been higher. SamTrans typically directs the estimated $1.4 million into their general Redi-Wheels program funding pot. Before 2018,

if the allocation was higher than $1.4 million, the funding agreements between SamTrans and C/CAG provided the excess funds to SamTrans for their general Redi-Wheels program. Beginning in2018, C/CAG has stipulated that anything else allocated above the $1.4 million would fund other Senior Mobility programs specified in the funding agreement. As described by the SamTrans team, the program has about $500,000 that falls into that category that the team has been saving for larger upcoming projects such as an online reservation system. Additionally, the Transit Operations program has allocated up to $100,000 to fund the local match to update CBTPs as described above .

The overall Redi-Wheels program costs approximately $19.1 million annually (of which Measure M contributes about 7%) to operate. Much of this comes from state and federal funding sources, which unlike Measure M, provide little flexibility in how funding can be spent.

5.4.3 Metrics

The Redi-Wheels program is evaluated by a number of performance measures, which are outlined in Table 5-4 below with the most recent year's (FY 18-19) reported performance data.

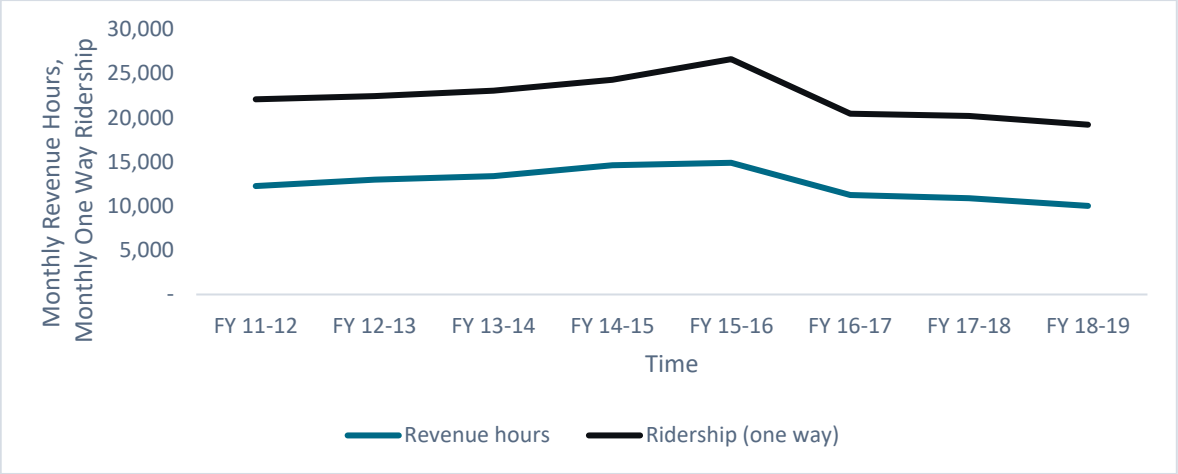
Table 5-4: Redi-Wheels Program FY 19-20 Performance Data

Performance Measure	FY 19-20 Data[3]
Number of revenue hours	126,524 hours
Total ridership	58,392 one-way riders
Individuals riding in a given month	1,660 individuals
Productivity (passengers per hour)	1.85 passengers
On-time performance	93%
Miles between preventable accidents	73,388 miles
Telephone hold time	0.68 minutes
Cost per rider	$82.19

The program serves around two thousand individuals annually, making on average 20,000 one-way trips a year. Ridership and revenue hours served by the Redi-Wheels Program are shown in Figure 5-7Figure 5-7 below.

[3] *Source: Measure M Annual Reports*

Figure 5-7. Redi-Wheels Program Performance Indicators[4]

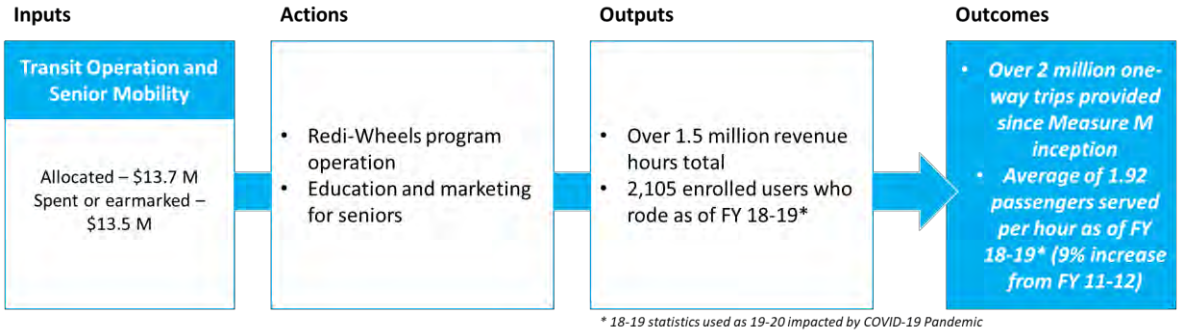


Metrics collected for other Senior Mobility programs are less consistent, as the projects and programs included have varied significantly over the years. In FY 19-20, the program used Measure M funds to:

- Update, print and distribute the Senior Mobility Guide in English, Spanish and Chinese
- Attend events such as Seniors on the Move, and Facebook festivals, and fairs directed at health and senior issues
- Present at senior housing sites and classes aimed at safe driving for seniors
- Purchase promotional items to distribute at events

The sample evaluation framework for this section of the program is defined in Figure 5-8.

Figure 5-8. Transit Ops/Senior Mobility Logic Framework



[4] *SamTrans reported average Ridership and Revenue Hours per month through FY 15-16, and began reporting those metrics through average by quarter in FY 16-17. This chart demonstrates both metrics by month. Table only includes data through FY 18-19 as FY 19-20 was impacted by the response to the COVID-19 pandemic.*

5.5 Safe Routes to School

5.5.1 Program Description

The initiation of the San Mateo County Safe Routes to Schools (SRTS) Program is a direct result of Measure M, which provides the local match needed to secure federal funding. The SRTS program is a countywide effort that aims to reduce traffic congestion around schools and improve air quality, with the co-benefit of promoting students' health and fitness. This is done by increasing the number of students biking, walking, carpooling, and/or taking transit to schools. The SRTS team has successfully engaged with districts, schools and students and parents to encourage non-driving modes.

C/CAG contracts with the San Mateo County Office of Education (COE) to deliver the program in order to better serve the needs of the K-12 schools. COE works directly with the schools and school districts that apply and receive funding.

The SRTS funding provided by Caltrans comes through the Congestion Mitigation and Air Quality (CMAQ) Program, and are distributed through MTC's OBAG fund. CMAQ requires that funding be focused on non-infrastructure projects. The San Mateo County SRTS program has focused on activities in the areas of education, encouragement, and evaluation. This includes on-site educational events, travel survey distribution and evaluation, and walk and bike audits.

Measure M funds, however, are more flexible than those issued through the CMAQ program, and thus they have also historically been used to support special projects outside of the local match contribution. These include small projects such as the provision of stipends to teachers who support SRTS, as well as larger undertakings, such as the joint SRTS/Green Infrastructure capital projects that were implemented in 2018. These pilot projects were implemented to demonstrate that green infrastructure can be cost-effectively integrated with traditional SRTS infrastructure projects to enhance safety and achieve stormwater pollutant reductions. C/CAG funded ten projects which included elements of both SRTS infrastructure and stormwater, such as curb extensions and crossing improvements with bioretention components.

5.5.2 Funding Overview

The SRTS program receives 6% of the net Measure M allocation. C/CAG uses Measure M funds along with the MTC allocated federal funds for this program. The Measure M fund satisfies the local match (11.52%) requirement for access to the federal funds. The remaining funding are used on SRTS-related special projects at C/CAG's discretion.

Through FY 19-20, $3.7 million has been allocated to the program, and $2.4 million has been spent.

Most recently, $1 million was directed to fund the joint Safe Routes to School and Green Infrastructure projects, to provide green infrastructure development at and near school sites. Therefore, there is a balance of $363k.

5.5.3 Metrics

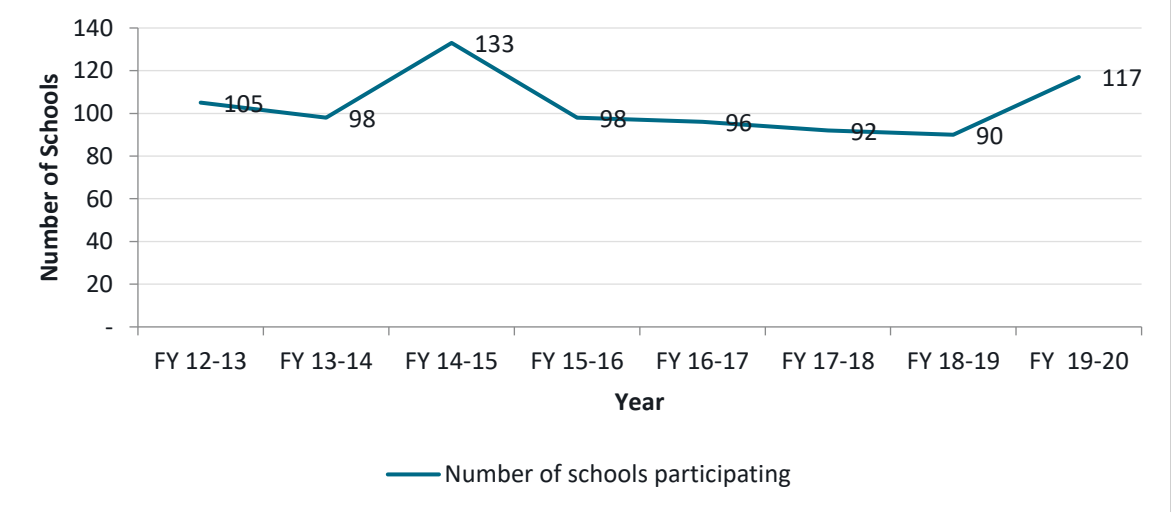
The COE collects performance measures for the SRTS program's Annual Report, and provides similar metrics to C/CAG. The Office of Education keeps track of participating schools and districts, as well as activities completed across the program. The most recent year reported has been outlined in Table 5-5.

Table 5-5. SRTS Performance Data

Performance Measure	FY 19-20 Data[5]
Participating school districts	13
Participating individual schools	117
Educational bicycle rodeos	8
Assemblies and classes	166
Encouragement events	130
Walk and bike audits	4
Walk and Bike to School Route Maps	6

Of note, the SRTS Annual Report for FY 14-15 listed the total number of supported schools as 133, but later in the report states that 133 "schools and/or organizations" participated in the program, so it may be that the apparent spike in participation for that year is due to a different method of data collection than is seen in the other years.

Figure 5-9. SRTS Participating Schools[6]



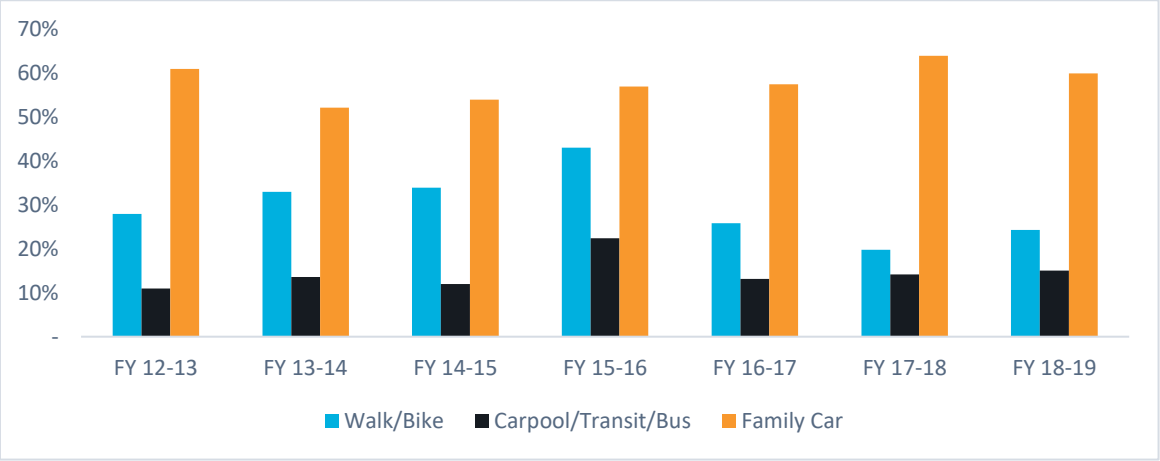
[5] *Source: Measure M Annual Report FY 19-20*

[6] *Source: SRTS Annual Reports through FY 17-18, supplemented with Measure M Annual Report for FY 18-19 and 19-20.*

Additionally, the SRTS program reports mode share results from 'Travel Talley' surveys, shown in Figure 5-10. Family car mode share averages at 58% across the available years, with a low of 52% in FY 13-14 and a high of 64% in FY 17-18.

Of note, while Travel Talleys have been conducted throughout the existence of the SRTS program, the available data lacks consistencies. The data depicted in Figure 5.10 is pulled from the SRTS Annual Reports, and, where possible, from surveys conducted in the Fall of each fiscal year. Of note, the FY 14-15 Annual Report does not display mode share data, so that year has been taken from the FY 14-15 Measure M Annual Report. Survey data from FY 17-18 and 18-19 is only available from surveys conducted in the Spring. The SRTS program reported a significant spike in bicycle travel in FY 15-16, at 18%, which is more than double the reported bicycle mode share of any other year.

Figure 5-10: SRTS Mode Share[7]



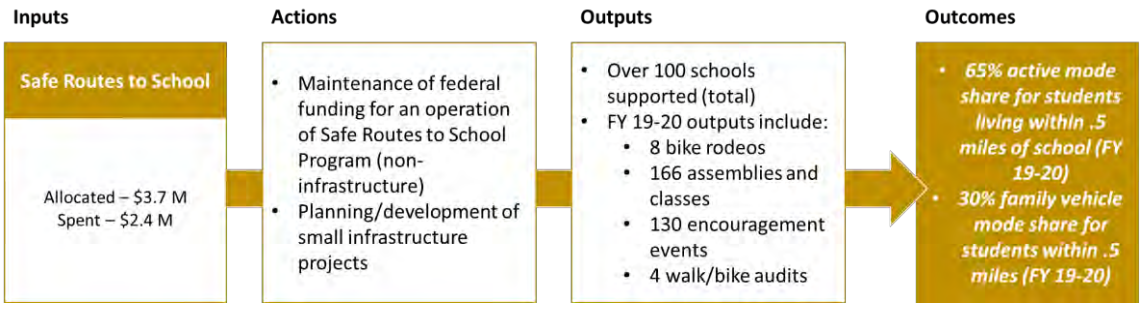
The data provided from FY 19-20 does not present total percentages by mode, but instead splits their report between students who live within ½ mile from school and those who live further away, therefore this data has not been included in Figure 5-10. Notably however, over 65% of students who live within ½ mile of their schools travel to school by walking or biking.

The SRTS program can also point to other anecdotal successes, such as their ability to expand the program through an equity analysis and engagement with cities' Planning and Public Works Departments to reflect the program's infrastructure needs.

[7] *Source: SRTS Annual Reports through FY 17-18, supplemented with Measure M Annual Reports for FY 14-15 and 18-19*

The sample evaluation framework for this section of the program is defined in Figure 5-11.

Figure 5-11: Safe Routes to School Logic Framework[8]



5.6 Regional Traffic Congestion Management (ITS and Smart Corridor)

5.6.1 Program Description

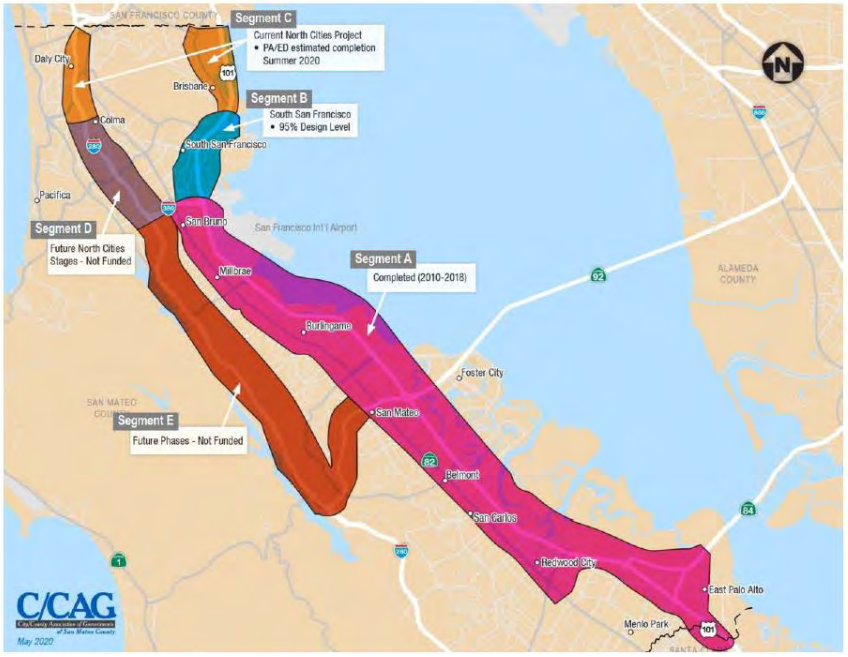
To date, the Intelligent Transportation System (ITS) program has primarily supported the San Mateo County Smart Corridor project. The project aims to reduce traffic congestion-related delays and improve safety and mobility for San Mateo County motorists through the deployment of integrated ITS elements, which manage traffic that naturally diverts to major arterials when there are incidents on the highway. The project uses a combination of cameras, detection systems, fiber and changeable messaging displays on roadsides to assist motorists. These tools also provide cities and Caltrans the ability to manage recurring and non-recurring traffic.

As is demonstrated in Figure 5.12, C/CAG has completed the delivery of projects along Highway 101 in the southern part of the county (Segment A), and has now moved on to work on two new segments:

- Segment B: City of South San Francisco – completed 100% project design
- Segment C: Cities of Daly City, Brisbane and Colma – completed the Project Approval and Environmental Document (PAED) phase, and start design in 2021
- Future Segments D and E along Interstate 280 are not yet funded.

[8] *Inconsistencies in data reporting make it difficult to confidently identify long-term trends.*

Figure 5-12: Smart Corridor Project Segment Status



When construction activities complete, the city owned traffic signal controllers, cabinets, signal interconnect equipment, and traffic signals operating software systems, become part of the city's property. Per the Ownership, Operation, and Maintenance Agreement executed between C/CAG and the cities, C/CAG would seek and secure funding to maintain new equipment installed as part of the Smart Corridor project. The new equipment refers to trailblazer signs, closed-circuit television cameras, communications, vehicle detection systems, and center to center communication between the San Mateo County hub and the Caltrans Traffic Management Center.

Although the local jurisdictions are expected to maintain and protect the ITS infrastructure, including fiber communications, due to resource constraints, local jurisdictions have not been taking on that responsibility. As a result, C/CAG may be required to continue active management and maintenance of the corridor and its assets in the long-term.

5.6.2 Funding Overview

The ITS program receives 10% of Measure M allocation, which is approximately $680,000 annually. To date, $6.3 million has been allocated and $1.7 million of Measure M funds have been spent.

The Smart Corridor project itself is capital intensive. Together, the two in-progress segments are anticipated to cost $18.9 million[9]. C/CAG funds the ITS program through a

[9] *Source: Final Smart Corridor Project Update Presentation, June, 2020*

variety of sources including State Transportation Improvement Program grants and Traffic Congestion grants, such as the Traffic Light Synchronization Program.

Given the size and nature of these capital improvements, Measure M funds aren't spent in even amounts annually as some of the previously mentioned Countywide Transportation Programs. Instead, Measure M has been used as the seed money for the Smart Corridor project, which then leveraged over $60 million of State and Federal grants, and will continue to be used to augment and/or secure outside funding sources as future segments are completed. Close to $1.3 million of the Measure M revenues has been earmarked to fund the South San Francisco (Segment B) expansion.

5.6.3 Metrics

The ITS team collects two types of metrics:

- Data on constructed components
- Data on incidents

Table 5-6 demonstrates the progress that has been made to date through the list of Segment A installed devices, as well as the upcoming components expected to be installed in Segments B and C, which will be funded with a combination of Measure M and other sources.

Table 5-6: Smart Corridor Project Existing and Proposed Components

Smart Corridor Project Components/Devices	Segment A[10] *Existing*	Segment B[11] *In progress*	Segment C *In progress*	Total
Traffic signal controller upgrades	118	20	24	**162**
CCTV cameras	45	61	16	**122**
Electronic signs	26	10	16	**52**
Detection stations	9	7	11	**27**
Miles of fiber communications	50+	6	10	**66+**

Though the system has only been implemented twice, initial metrics collected demonstrated its success in reducing travel times and increasing corridor speeds during its deployment. Using Inrix data, Figure 5-13 and Figure 5-14 compare travel times before and during each incident with travel time on similar days when there is not an incident. Incident 1 involved an RV fire on a Thursday at 4:30pm, and Incident 2 related to police action at 5:30pm on a Friday.

Both incidents show a slow or stabilization during the first hour after the Smart Corridor system was deployed, followed by a significant decrease in the second hour.

[10] *Source: Kimley Horn SMART Corridor Maintenance Plan (Draft)*

[11] *Source: Final Smart Corridor Project Update Presentation*

Figure 5-13. Incident 1 Response

RV Fire Near Holly Street – NB Alternate Route Travel Time Data

(Whipple Ave to El Camino Real to Holly St)

Time of Day	Thursday Annual (2016)		Day of Incident (10/20/16)	
	Travel Time (Minutes)	% Change from Previous Hour	Travel Time (Minutes)	% Change from Previous Hour
13	9.4	-	9.0	-
14	9.3	-2%	9.6	7%
15	9.8	6%	10.3	8%
16	10.3	5%	10.5	2%
17	11.3	10%	15.8	50%
18*	10.4	-8%	20.7	31%
19*	8.9	-14%	16.1	-22%
20	8.3	-7%	11.7	-28%
21	8.0	-4%	7.7	-34%
22	7.6	-5%	7.1	-7%
23	7.2	-5%	7.1	-1%

- Incident began at 4:30 pm (16:30), incident ended at 8 pm (20:00)

* Incident Response Signal Timing Implemented

Figure 5-14. Incident 2 Response

Police Action Near Route 92 – NB Alternate Route Travel Time Data

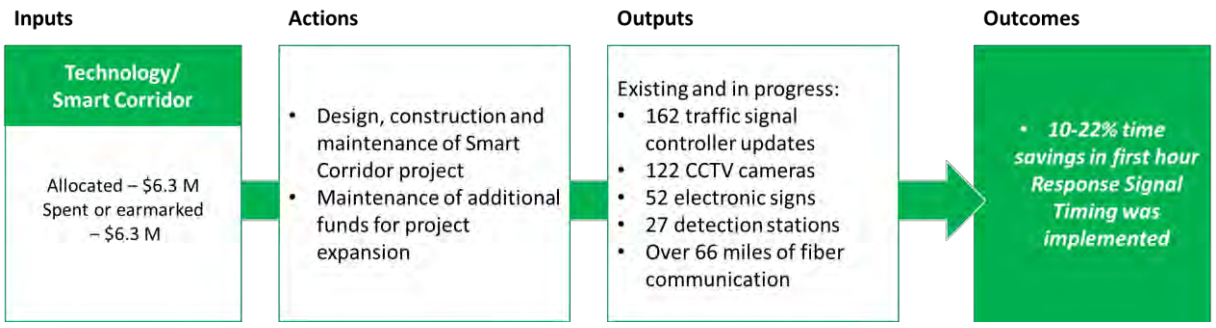
Time of Day	Friday Annual (2017) Average		Day of Incident (4/28/17)	
	Travel Time (Minutes)	% Change from Previous Hour	Travel Time (Minutes)	% Change from Previous Hour
13	10	-	9.6	-
14	10.2	2%	10.3	7%
15	11.1	9%	11.3	10%
16	10.9	-2%	11.5	2%
17	11.8	8%	11.8	3%
18	10.8	-8%	15.1	28%
19	9.8	-9%	18	19%
20*	9.2	-6%	18.5	3%
21*	8.8	-4%	16.6	-10%
22*	8.5	-3%	16.2	-2%
23*	8.3	-2%	12.4	-23%
0	8	-4%	9.7	-22%
1	7.9	-1%	7.7	-21%
2	7.8	-1%	7.3	-5%
3	8.2	5%	7.5	3%

- Incident began at 5:30 pm (17:30), incident ended at 12:45 am (0:45).

* Incident Response Signal Timing Implemented

The sample evaluation framework for this section of the program is defined in Figure 5-15.

Figure 5-15: ITS/Smart Corridor Logic Framework



5.7 Stormwater Program

5.7.1 Program Description

The Stormwater Program (NPDES/MRP) receives Measure M funding designated for pollution mitigation programs and projects. The stormwater team uses this funding for technical support activities, stormwater-related public education and outreach, member agency training, water quality monitoring, green infrastructure planning, watershed modeling, and efforts to reduce mercury and polychlorinated biphenyl (PCB) levels, trash, and urban pesticides.

The program supports seven technical subcommittees and permit compliance for San Mateo County jurisdictions, the requirements of which may change on a five-year basis when new permits are reissued.

In recent years, the Stormwater Program has achieved the following:

- Developed a Countywide Stormwater Resource Plan
- Developed and submitted Countywide Water Pollution Prevention Program's annual compliance reports
- Developed and reviewed Annual Reports for 21 member agencies
- Supported Green Infrastructure Design Guide and local tools and guidance for developing municipal Green Infrastructure Plans
- Developed initial countywide hydrology and sediment transport model
- Established local programs to manage PCBs in building materials during demolition
- Developed Control Measure Implementation Plan for achieving PCBs and mercury Total Maximum Daily Loads waste load allocations for San Mateo County.

Most of the support is provided through outside consultants.

5.7.2 Funding Overview

The Stormwater Program is allocated 12% of net Measure M funds. This has amounted to $7.5 million through FY 19-20 to this program, and the program has spent $7.1 million (95%) of its allocation.

Measure M funds cover about 35% of the program's budget, and the remainder is primarily made up of fees placed on the property tax bills for parcels throughout the county.

5.7.3 Metrics

The Stormwater Program's goals, listed in full in their 5-year Municipal Regional Stormwater Permits issued by the Regional Board, include meeting long-term water quality goals and ensuring compliance with the San Mateo County co-permittees' MRP requirements.

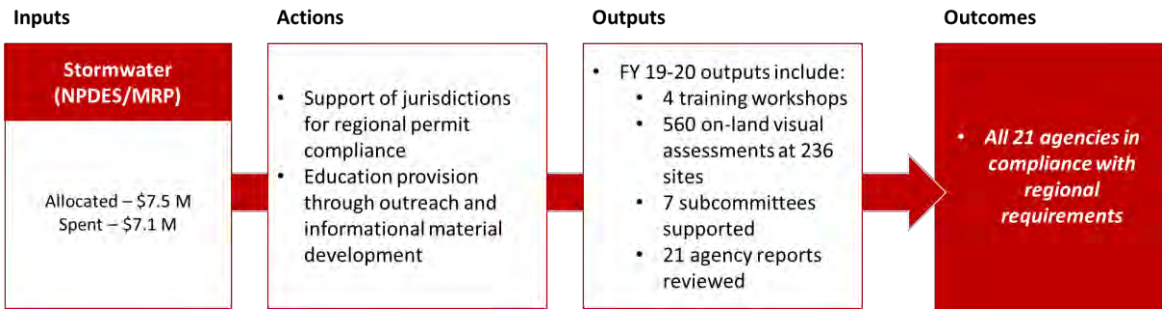
Through the process of helping each of the jurisdictions in San Mateo County remain compliant with MRP requirements, the Stormwater Program collects metrics related to:

- Training sessions and other education provided
- Development of resources and documents
- Visual assessments of success of agency trash load reduction actions
- Planning and implementing Green infrastructure
- Water quality samples
- Public education and outreach impact and effectiveness

These metrics are collected and reported for the MRP, and some have historically been documented in Measure M's annual report. The programming varies year to year, however, so it may be difficult to consistently evaluate success or impact over time given the evolving nature of some permit requirements.

The sample evaluation framework for this section of the program is defined in Figure 5-16.

Figure 5-16: Stormwater Program Logic Framework



6 Observations and Next Steps

6.1 Performance Assessment Observations

After completing a review of the Measure M program, six key themes become apparent:

1. Program flexibility supports successful investment of Measure M funds

At a basic level, Measure M supports a wide variety of programs across San Mateo County. Within those programs, Measure M funds also provide a level of flexibility not typically permitted through other sources, allowing it to fund both programs and capital projects, basic services and more innovative interventions. This flexibility is appreciated across the County by jurisdictions and Countywide Transportation Program managers alike.

2. Measure M funding supports intended outcomes/goals with opportunities to expand impact

The programs that Measure M supports all relate directly to the intended outcomes of the Measure M program. It is evident that Measure M funding contributes successfully to several outcomes, including:

- Increased use of transit by seniors.
- Travel time savings accrued from ITS deployment following traffic incidents; and
- Increased active transportation mode share amongst students.
- Reduced stormwater pollution related to motor vehicles

There is also opportunity to improve upon metrics collection in order to help Measure M demonstrate its full impact. It is possible that additional stated objectives (*outcomes*) have been achieved by the programs receiving Measure M funding, but because of a lack of evidence (*outputs*), that may not be clear to voters and other decision makers who ultimately determine the long-term status of Measure M. Clearer and performance measure collection processes will likely improve upon the demonstrated progress toward Measure M goals.

3. Measure M funding creates opportunities for larger projects and programs

As is demonstrated by the SRTS and ITS Countywide Programs, as well as by some of the jurisdictions receiving Local Streets and Roads funding, Measure M's ability to be used as a local match has created opportunities. It has allowed for the implementation of projects and programs that might otherwise have not been possible, and has secured state and federal investment into San Mateo County.

4. Standardizing performance indicators would more comprehensively demonstrate value of the Measure M program in future reviews.

Although both of the previous Measure M 5-Year Implementation Plans have outlined Performance Measures associated with each funding recipient, monitoring and reporting of progress and success toward outcomes remains inconsistent.

- *Some recipients don't report all of their relevant metrics, and others report none at all.* While most of the Measure M funding recipients (including both jurisdictions and Countywide Programs) collect some information about their programs' outputs, not all of it is being reported to C/CAG.
- *Some recipients do collect and report on performance indicators, but they are not directly tied to outcomes*. There is an opportunity for C/CAG to guide funding recipients toward collecting indicators that either directly measure outcomes, or outputs that can be readily 'converted' to outcomes by making simple and standardized assumptions. An evolution toward collecting more tangible outcome indicators (as shown in Figure 6-1 over the course of the five year strategy) will help communicate the impacts of the program and also identify opportunities to augment performance.

Figure 6-1: Output vs Outcome Data Collection Over the Five Year Strategy

- *There have been inconsistencies demonstrated in reported metrics throughout the years*. The flexibility of Measure M funding is one of the programs strengths. It is not unexpected that programs may evolve and that through that, process indicators may change. However, this can make it difficult to measure continued success, or even success over a previously measured baseline. The program may benefit from more clearly defined monitoring and reporting process, in addition toa focused set of readily measurable metrics in order to provide enough data to demonstrate change and long-term impact.

5. Improved trackability for Measure M Investments when they are applied to projects with multiple funding streams

Within both the Local Streets and Roads and Countywide Program allocations, Measure M funds are typically lumped in with funds from other sources. Measure M funds sometimes only account for a small percentage of the program or project's operating budget. While the Measure M funding may be contributing to an incredibly successful program, the program's overall successes may not speak directly to the impact of the Measure M funding itself.

Conversely, there are a few instances (such as the use of SRTS funds to fund school site stormwater infrastructure projects) where the flexible nature of the Measure M funds established a unique project or program, but these tend to be special instances. C/CAG should establish a mechanism to use overflow from interest or unexpected residual funding. Where possible, C/CAG should encourage the use of Measure M funds for projects it can fund in full, or for dedicated aspects of larger projects or programs to best draw ties between Measure M funds and the impacts of the programs they support.

6. Reporting and invoicing processes could be augmented to support timely data collection and demonstration of impact.

Though the programs are provided with deadlines to submit reimbursement requests and documentation, administrative time is required by C/CAG staff to answer questions about allowable reimbursements, enter information from unorganized invoices, or follow up with jurisdictions for their requests.

It is recommended that C/CAG consider standardizing the reimbursement request process. A simple online form that accompanies invoice submissions is likely to support improved data management and save agency staff time . It would also allow C/CAG to clearly request a small amount of easily collectable but standardized information on program outputs, which will result in better data from funding recipients.

6.2 Next Steps

This Program Assessment will be used to inform the remainder of the Measure M Strategic Planning process, which will take place between November 2020 and June 2021. This process will include:

- Developing goals, objectives and performance measures
- Researching best practices nationally
- Identifying a list of strategies to move the Measure M program forward

Developing and finalizing the 2022-2027 Implementation Plan.

A Local Streets and Roads Survey

General + Finance

* 1. What jurisdiction do you represent?

* 2. Please provide your contact information

Name

Title

Department

Email Address

Phone Number

* 3. Are you responsible for administering the Measure M program for your jurisdiction?

- Yes
- No

4. If you are not the program administrator, please tell us the title and department of the person who is in charge of administering the Measure M program for your jurisdiction.

Name

Title

Department

* 5. What percentage of your total expenditure on projects using Measure M funds comes from Measure M?

- 0-24%
- 25-49%
- 50-74%
- 75%+

* 6. Have you used Measure M funding as a local match to secure additional State or Federal funds?

- Yes
- No
- No, but would like to in the future

Project Information

* 7. What kinds of projects or programs are your Measure M funds typically used towards? (Please choose all that apply.)

- [ ] Traffic Congestion Management
- [ ] Stormwater Pollution Prevention

* 8. If you use Measure M funding to pay for ***Traffic Congestion Management*** projects or programs, which types?

- [ ] Local shuttles/transportation
- [ ] Road resurfacing/reconstruction
- [ ] Deployment of local ITS
- [ ] Roadway operations
- [ ] Replacement and/or upgrading of traffic signal hardware and/or software
- [ ] N/A - we do not use Measure M to fund Traffic Congestion Management
- [ ] Other (please specify)

* 9. If you use Measure M funding to pay for ***Stormwater Pollution Prevention*** projects or programs, which types?

- [ ] Street sweeping
- [ ] Roadway storm inlet cleaning
- [ ] Street side runoff treatment
- [ ] Auto repair shop inspections
- [ ] Managing runoff from street/parking lot
- [ ] Small capital projects such as vehicle related runoff management/controls
- [ ] Capital purchases for new motor vehicle related runoff management/controls
- [ ] Additional used oil drop off locations
- [ ] Motor vehicle fluid recycling programs
- [ ] Installation of new pervious surface median strips in roadways
- [ ] Stormwater and BMP awareness training for staff and subcontractors
- [ ] N/A - we do not use Measure M to fund Stormwater Pollution Prevention
- [ ] Other (please specify)

* 10. What metrics do you use to evaluate and monitor the success of your ***Traffic Congestion Management*** projects and programs?

- [ ] Number of passengers transported
- [ ] Miles/fraction of miles of roads improved
- [ ] Number of ITS components installed/implemented
- [ ] Number of units replaced and/or upgraded
- [ ] Tonne of GHG emissions reduced
- [ ] Number of Vehicle Miles Traveled reduced
- [ ] Incident clearance time
- [ ] We do not collect specific metrics for our Traffic Congestion Management projects and programs
- [ ] N/A - we do not use Measure M to fund Traffic Congestion Management projects and programs
- [ ] Other (please specify)

* 11. What metrics do you use to evaluate and monitor the success of your ***Stormwater Pollution Prevention*** projects and programs?

- [ ] Number of auto repair shops inspected
- [ ] Square feet of surfaces managed annually
- [ ] Number of projects implemented
- [ ] Number of pieces of equipment purchases and installed
- [ ] Number of locations implemented/operated;oil quantity collected
- [ ] Number of programs implemented/operated; fluid quantity collected
- [ ] Square footage of new pervious surface median strips installed
- [ ] We do not collect specific metrics for our Stormwater Pollution Prevention projects and programs.
- [ ] N/A - we do not use Measure M to fund Stormwater Pollution Prevention projects and programs.
- [ ] Other (please specify)

* 12. What techniques do you use to evaluate and report on Measure M funded projects and programs?

- [ ] Internal spreadsheets
- [ ] Published reports
- [ ] Passenger logs
- [ ] We do not monitor or report on Measure M funded programs
- [ ] Other (please specify)

* 13. How much time do you and your team currently dedicate to performing data collection, monitoring and reporting on Measure M-funded projects and programs?

- ( ) Less than 2 hours per week
- ( ) 2-4 hours per week
- ( ) 5-9 hours per week
- ( ) 10-19 hours per week
- ( ) 20 hours + per week
- ( ) We do not have time dedicated to monitoring or reporting on Measure M funded projects or programs.

* 14. C/CAG is interested in learning more about how Measure M funded projects are working in each jurisdiction. How much additional time would be required by your agency to collect and report program and project related data:

	Less than 2 hours per week	2-4 hours per week	5-9 hours per week	10-20 hours per week	20 hours + per week	N/A - this metric would not apply to the projects or programs we fund with Measure M
Vehicle miles traveled reduced	○	○	○	○	○	○
ITS components installed	○	○	○	○	○	○
Average peak hour speed	○	○	○	○	○	○
Level of Service improvement	○	○	○	○	○	○
Incident clearance time	○	○	○	○	○	○
Stormwater volume managed	○	○	○	○	○	○
Acres of impervious area treated	○	○	○	○	○	○
Volume of pollutant removed	○	○	○	○	○	○
Square feet of bioretention constructed	○	○	○	○	○	○

Other (please specify)

* 15. Would you be willing to provide C/CAG with annual data related to the spend of your Measure M funds?

- ○ Yes
- ○ No
- ○ Maybe
- ○ Other (please specify)

16. If you have information on hand to upload now, please do. Otherwise, we will follow up with you if you indicated that you'd be willing to share data.

Please note that Survey Monkey does not allow for the upload of Excel files, so we are happy to collect those through email.

Choose File Choose File No file chosen

Future Preferences

* 17. Measure M funding is currently allocated based on population count and roadway miles. A minimum of $75,000 is allocated to each jurisdiction. Do you think there should be changes to how funding is allocated?

- Yes
- No

18. If you selected "yes," please describe what you think should be changed, and why.

* 19. Do you face challenges in using your allocated Measure M funds in a timely manner?

- Yes
- No

20. If you selected "yes," please describe these challenges.

* 21. Do you face challenges in submitting invoices for Measure M funding in a timely manner?

- Yes
- No

22. If you selected "yes," please describe these challenges.

* 23. Does the current list of eligible project types within the ***Traffic Congestion Management*** category (shown in Question 8) allow you to apply for funding for all Traffic Congestion Management projects or programs you deliver?

- Yes
- No

24. If you selected "no," please list the other project or program types that should be included.

* 25. Does the current list of eligible project types within the ***Stormwater Pollution Prevention*** category (shown in Question 9) allow you to apply for funding for all Stormwater Pollution Prevention projects or programs you deliver?

- Yes
- No

26. If you selected "no," please list the other project or program types that should be included.

* 27. In addition to the Local Streets and Roads funding that is allocated to the jurisdictions, Measure M provides funding to four Countywide programs. Please rank the importance of each program to you, with 5 being the *most* important.

	1	2	3	4	5
ITS/Smart Corridor					
Safe Routes to School					
Transportation Programs/Senior Mobility					
Stormwater Pollution Prevention					

28. If there is anything else you'd like to mention about the Measure M program, please let us know:

steer

steergroup.com

B

Best Practice Review

Memo
January 2021

Best Practice Review for Measure M Program

Prepared by:

Steer
800 Wilshire Blvd, Suite 1320,
Los Angeles, CA 90017
USA

+1 (213) 425 0990
www.steergroup.com

Prepared for:

C/CAG
555 County Center, 5th Floor
Redwood City, CA 94063

Introduction

Steer has been commissioned by City/County Association of Governments of San Mateo County (hereafter referred to as 'C/CAG') to undertake a case study review of county-level funding programs, specifically in relation to their allocation and implementation strategies. This exercise forms part of Steer's scope *Task 4: Development of Strategies,* to gain knowledge gleaned from similar programs to C/CAG's Measure M across North America and apply as a 'lessons learned' approach to improve Measure M's own program performance in the near to medium term.

This Technical Summary provides the case study overview to meet the above objectives, and the subsequent sections cover the following topic areas:

Section 1: Fee Structure Case Studies presents case studies of fee or tax programs overall. Their focus is on program operation and administration, funding allocation, and data collection. It includes:

- Introduction to the case studies examined, listed in order by those programs located geographically closest to San Mateo County.
- Comparison Table to highlight key details regarding the individual programs to facilitate comparison between the various initiatives.

Section 2: Programmatic Case Studies presents case studies on programs similar to the four Countywide Transportation Programs Measure M supports:

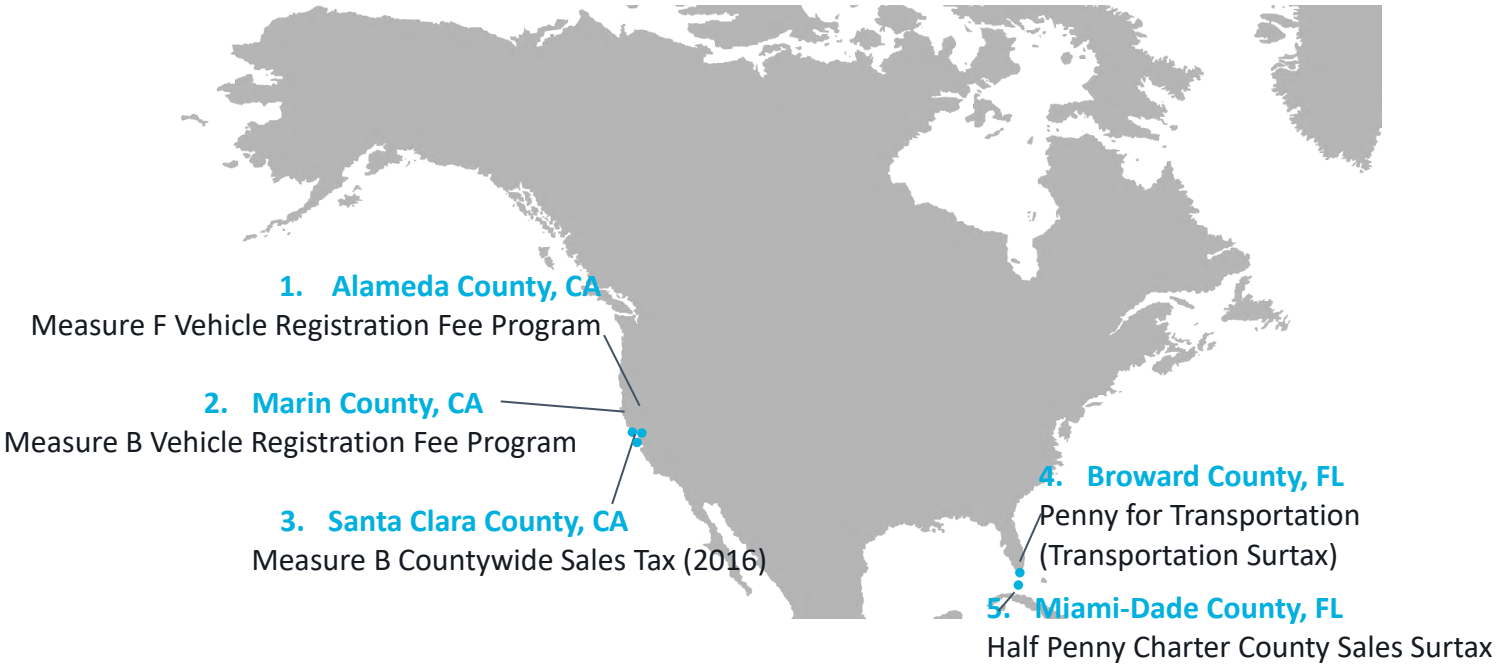
- Transit Operations/Senior Mobility;
- Intelligent Transportation System (ITS)/Smart Corridor;
- Safe Routes to School (SRTS); and
- Stormwater Pollution Prevention.

1 Fee Structure Case Studies

Within this section, Steer has prioritized identifying countywide programs comparable to Measure M that are located within the San Francisco Bay Area, followed more widely within California. We have further included programs with direct relevance to Measure M more broadly across the United States to provide a greater perspective.

Error! Reference source not found. illustrates the geographical reach of the case studies under examination.

Figure 1. Fee Structure Case Studies - Geographical Location



1.1 Alameda County, CA – Measure F Vehicle Registration Fee

Alameda forms one of the central-east counties of the Bay Area, and covers major metropolitan centers like Berkeley, Oakland, Alameda City, Pleasanton and Fremont. The **Measure F Vehicle Registration Fee** (VRF) Program began operation in May 2011 and is managed by Alameda County Transportation Commission (CTC). The program collects a $10 per year vehicle registration fee and generates approximately $11 million per year. The overall program goal is to sustain Alameda County's transportation network and reduce traffic congestion and vehicle-related pollution. Key details of Measure F are presented in **Error! Reference source not found.**.

Figure 2: Alameda CTC Bicycle Safety Education Program

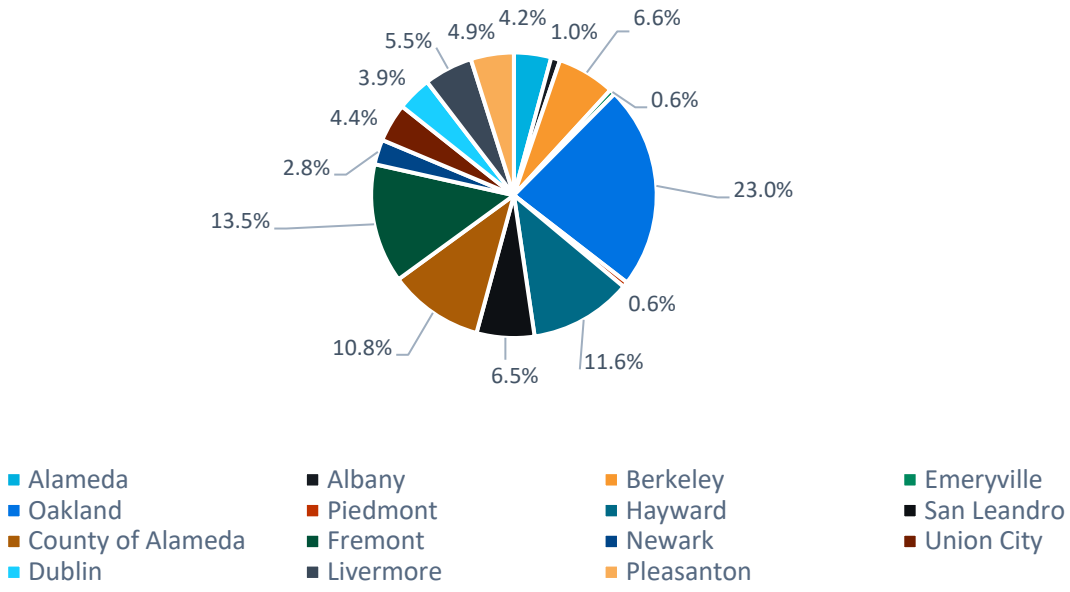
Alameda CTC developed the Countywide Investment Program (CIP) Programming Principles and Guidelines (11/2020) to provide a framework for programming and allocation decisions made by the Alameda CTC to accomplish countywide transportation goals and objectives. The principles are intended to create a uniform consolidation of historically separate programming goals and practices, where applicable, to more effectively coordinate funding towards highly beneficial transportation projects that address congestion, state of good repair, economic development, access, safety, and connectivity of a multimodal transportation system.

Jurisdictions and municipalities apply for funding through the CIP call for project nominations that is issued every two years, and are selected based on the following evaluation ratio; readiness delivery (45%), needs and benefits (45%) and matching funds (10%.) Projects programmed within first two years of a given CIP receive allocation.

Local Road Improvement and Repair Program

Monthly VRF local distribution payments are assigned to the 14 cities across the county. The distribution is decided by population and vehicles registered in each city, and the funding allocation for FY19/20 is shown overleaf at Figure 3.

Figure 3: Alameda County Local Road Improvement and Repair Program – FY19/20 Funding Distribution



Those that receive VRF funds for this particular program must enter into a Master Program Funding Agreement with Alameda CTC, which outlines specific programmatic and reporting requirements tied to the funds. VRF recipients are required to provide documentation of the following:

- VRF funds received from Alameda CTC;
- annual expenditures in sufficient detail to determine performance and use of funds;
- published articles that highlights funded improvements, program information on agency's website;
- public identification of program improvements as a benefit of VRF funds;
- the agency's Pavement Condition Index (PCI) Scale as reference for the condition of local streets, and roads, and;
- agency's adherence to the DLD Timely Use of Funds policy. The Timely Use of Funds policy stipulates that the DLD recipient cannot carry a fiscal year ending fund balance greater than 40% of the DLD revenue received for that same fiscal year for four consecutive fiscal years.[1]

Projects funded by discretionary funds have their own performance measures and standards. If projects do not meet the standards, fund recipients are required to outline concrete steps to correct deficiencies.

[1] Fund recipients can submit a Request for Exemption from this policy with justification and implementation plan; if denied, the CTC rescinds one year of fund distribution. The instructions to record and submit VRF program compliance documentation can be found on the Alameda CTC website.

Table 1: Alameda County Overview

Funding Recipient	Program Type	Proportion of funds received	Project Selection Criteria	Monitoring/Reporting
Local Road Improvement and Repair Program	Street repaving and rehabilitation; traffic signal maintenance and upgrades; signing and striping on roadways; Sidewalk repair and installation; bus stop improvements; improvements to roadways at rail crossings; improvements to roadways with truck or transit routing	60%	Standard evaluation matrix: • Readiness delivery (45%) • Needs and benefits (45%) • Matching funds (10%)	Recipients of the funding must adhere to performance metrics and standards set by the county. If they fall below the standards, they must outline corrective actions and potential improvements to correct the deficiency.
Transit for Congestion Relief	Transit service expansion/preservation; transit priority; transit incentive schemes; park and ride facilities; fleet decisions; rail station access/ capacity improvements	25%, split as follows: • 70%: capital infrastructure investments • 30%: non-infrastructure (e.g. program operations, plans and studies)	Standard evaluation matrix, plus priority is given to projects that increase transit access and ridership; listed in Alameda CTC's Plans; address reliability of service operations, and Express Bus Services	
Local Transportation Technology	Aimed at local and arterial streets. New technologies; alternative fuel infrastructure; advanced signaling for active modes	10%, split as follows: • 70%: capital infrastructure investments • 30%: non-infrastructure (e.g. program operations, plans and studies)	Standard evaluation matrix, plus priority given to projects that are new and innovative; regional projects in Alameda CTC's plans; increase transit access and ridership; asset innovation and management; enhance efficiency of moving people and goods; increase safety	
Pedestrian and Bicyclist Access and Safety Program	SRTS; access and safety in activity centers/downtown/transit hubs.	5%, split as follows: • 70%: capital infrastructure investments • 30%: non-infrastructure (e.g. program operations, plans and studies)	Guidelines are updated before each funding cycle. Complete Streets policy; comply with California Complete Streets Act; have an adopted Local Pedestrian and Bike Master Plan/or be in the process of developing one that will be updated once every 5 years minimum.	

1.2 Marin County, CA – Measure B Vehicle Registration Fee

Marin County is located directly north of the City of San Francisco, served by two key transit agencies; Marin Transit and Golden Gate Transit. The county's **Measure B Vehicle Registration Fee** (VRF) program was approved by 63% of voters in 2010. Managed by the Transportation Authority of Marin (TAM), it collects $10 per vehicle and generates roughly $2 million per year. This revenue goes towards the three key program areas identified in **Error! Reference source not found.**.

TAM's Strategic Vision Plan (Draft, 2017) establishes the timing of allocations and addresses funding priorities, and any applications are evaluated against this. The TAM Board approves funding allocations and are executed by the TAM Executive Director.

- **Local streets and pathways:** applicants must submit an allocation request form that specifies projects anticipated for implementation with the proposed funding.
  - The 'Streets' portion of the above program is distributed to cities, towns and the County of Marin based on a formula that combines population (50%) and lane miles (50%), and the funding priorities are determined by local public works directors in concertation with local agencies, residents, and councils (i.e. a high level of flexibility where funding is allocated towards).
  - Funding for the 'pathways' portion is based on publicly availability inventory of pathways and is distributed to the agencies and jurisdictions that own, operate and maintain them.
  - For Class I Bike/Pedestrian Pathway projects, sponsors need to submit an allocation request form that specifies projects anticipated for implementation.
- **Improve transit for seniors and persons with disabilities:** funds are directly distributed to Marin Transit, which submits a list of projects and programs that are eligible for funding. Funds for congestion and pollution reduction are usually distributed every two years to TAM, Marin Transit, and/or Golden Gate Transit based on grant opportunities and funding needs.

Figure 4: TAM Crossing Guard Program in Novato City

Table 2: Marin County Overview

Funding Recipient	Program Type	Proportion of funds received	Project Selection Criteria	Monitoring/Reporting
Local Streets and Pathways	Road maintenance; congestion relief; safety improvements; emergency pothole repair; crosswalk and accessibility enhancements; intersection control; streetscape improvements to manage stormwater runoff; maintenance of Class I bike/pedestrian pathways	40%, split as follows: • 35%: local streets • 5%: Class I bike/pedestrian pathways	Though projects are approved by the County, funds are distributed to jurisdictions based on a forumla that combines population (50%) and lane miles (50%),	• Recipients are required to submit Annual/Closeout reports per the provisions of the funding agreement • Data is available in the Citizens' Oversight Committee Annual Report (public domain); Independent Financial Reports; Quarterly Financial Reports
Improve Transit for Seniors and Persons with Disabilities	Implementing a Mobility Management Program; supporting and enhancing paratransit; creating a "Paratransit Plus" program to serve older seniors who do not qualify for service under ADA; implement other programs to provide mobility to seniors as an alternative to driving	35%	Priorities are: "Paratransit Plus"; volunteer driver programs support; low income rider scholarships; gap-grant program; mobility management staffing	
Reduce Congestion and Pollution	• School safety and congestion reduction • **TAM:** local Marin County Commute Alternatives • **Marin Transit/Golden Gate Transit:** alternative fuel infrastructure and promotion	25%	Targeting matching grant opportunities, pilot programs and other timely revenue opportunities	

1.3 Santa Clara County, CA – Measure B Program

Santa Clara County is located immediately south of the Bay Area and is one of California's most populated regions, with high densities across the San Jose metropolitan area. Countywide sales tax programs have been deployed for the last 30 years to enhance transit, highways, expressways and active transportation, with the latest program **Measure B** launched in 2016. An overview of the nine program focus areas is detailed in **Error! Reference source not found.**, with additional comments on certain categories listed below.

Bike and Pedestrian Program

- If the planning studies grants category is not fully awarded, the remaining funds will roll into the capital category.
- If a cycle's funds are not fully awarded, the balance will roll into the next cycle's budget.

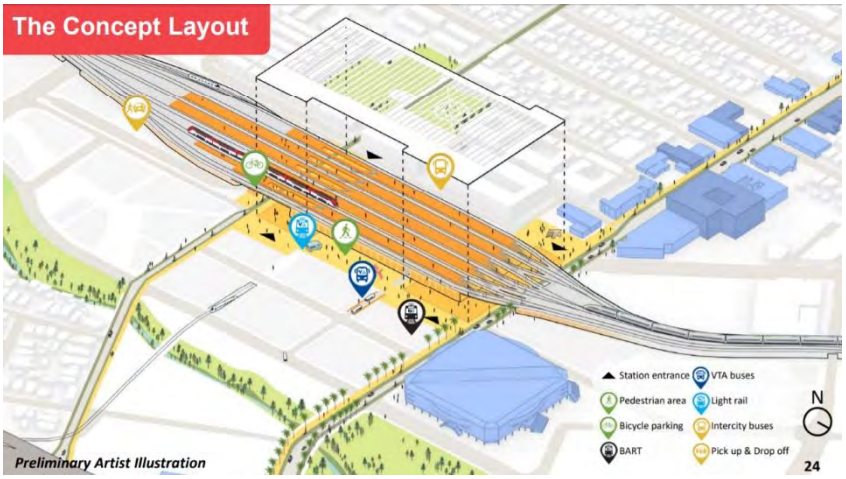
Local Streets & Roads Program

- If a city or the County has a PCI score of at least 70, it may use the funds for other congestion relief projects.
- For agencies with a PCI of 69 or lower, the program of projects is limited to street system maintenance and repair projects only.

Citizens' Oversight Committee (COC) oversees the budgeting and the expenses for all programs within the categories.

Transportation projects, especially larger projects (e.g. VTA's Bart Silicon Valley Phase 2), are typically built in Santa Clara County using a variety of funding sources. 2016 Measure B provides a local revenue source that can be leveraged to help obtain additional funds through regional, state and federal fund sources. A comprehensive website is available for 2016 Measure B which provides public-facing details on funding and expenditure per various search parameters (e.g. location/specific project name/grantees).

Figure 5: San Jose Diridon Integrated Station Concept Plan, funded through Caltrain Corridor Capacity Improvements Program



Source: Caltrain Integrated Concept Plan Board Meeting (December 2019)

Table 3: Santa Clara County Overview (from 2016 Program)

Funding Recipient	Program Type	Proportion of funds received	Project Selection Criteria	Monitoring/Reporting
VTA BART Silicon Valley Phase II	4 stations; new regional rail corridor; links to major transit	• 24% (of total funds) • Maximum of 25% of Program Tax Revenues	The VTA Board of Directors adopted specific guidelines specific to program (Oct/Nov 2017 meetings).	• 2016 Measure B website. • Must comply with VTA's Complete Streets Reporting Requirement
Bicycle and Pedestrian Program	Program funds split as follows: • Education and encouragement programs (15%) – – Base allocated to county for unincorporated areas, the rest split between jurisdictions by population with minimum • Capital projects – Environmental Clearance – Design – Right of Way – Construction (30-35% design elements) • Planning studies (max. 5%)	4% (of total funds)	• Priority given to programs which eliminate bike/pedestrian network gaps; improve connections and mobility; convenience; SRTS. • The VTA Board of Directors adopted specific guidelines specific to program (Oct/Nov 2017 meetings).	• 2016 Measure B website. • For education and encouragement programs - VTA will conduct an assessment regarding the effectiveness of the program. • VTA Complete Streets reporting requirements will be required for Planning and Capital projects.
Caltrain Corridor Capacity Improvements	Expand ridership capacity; level boarding; countywide service improvements; increased service to Morgan Hill and Gilroy	5% (of total funds)	The VTA Board of Directors adopted specific guidelines specific to program (Oct/Nov 2017 meetings).	• 2016 Measure B website. • VTA Complete Streets reporting requirements will be required for capital projects.

Funding Recipient	Program Type	Proportion of funds received	Project Selection Criteria	Monitoring/Reporting
Caltrain Grade Separations	Separate tracks from roadways; safer for pedestrians/bicyclists; reduce traffic congestion. Focused on Sunnyvale, Mountain View and Palo Alto cities. • Planning • Capital projects	11% (of total funds)	• The VTA Board of Directors adopted specific guidelines specific to program (Oct/Nov 2017 meetings). • Funds will be allocated to most cost-effective projects	• 2016 Measure B website. • Specific reporting requirements for each project (agreed with VTA) • VTA Complete Streets reporting requirements
County Expressways	Intersections/interchanges; widening; grade separations; reduce congestion; improve connections. 1. Conventional – Up to $10M 2. Major – $10-$50M 3. Lawrence Grade Separations	12% (of total funds)	• The VTA Board of Directors adopted specific guidelines specific to program (Oct/Nov 2017 meetings). • Project readiness; complexity; geographic balance; timings; safety; public support; gap closures	• 2016 Measure B website. • VTA Complete Streets reporting requirements
Highway Interchanges	Connectors; on/off ramps; widening; improve connectivity; safety; reduce congestion	12% (of total funds)	• The VTA Board of Directors adopted specific guidelines specific to program (Oct/Nov 2017 meetings). • Project readiness; local contribution; geographic balance • 2011 VTA Soundwall Study projects will receive higher consideration	• 2016 Measure B website. • Specific reporting requirements for each project (agreed with VTA)
Local Streets and Roads	Road repairs/improvements	19% (of total funds) All cities/towns receive funds, with allocated amount dependent on formula-based distribution.	• Complete Streets requirement • PCI rating	• 2016 Measure B website. • Complete Streets Checklist reporting requirements

Funding Recipient	Program Type	Proportion of funds received	Project Selection Criteria	Monitoring/Reporting
State Route 85 Corridor	Corridor transit study; transit and congestion relief projects; new transit lane from SB87 to U.S. 101; noise abatement; study transportation alternatives (BRT, LRT, future technologies)	6% (of total funds)	• The VTA Board of Directors adopted specific guidelines specific to program (Oct/Nov 2017 meetings) • Projects identified in VTA's SR 85 Transit Guideway Study (TG Study)	• 2016 Measure B website • VTA Complete Streets reporting requirements will be required for capital projects
Transit Operations	Program funds split as follows: • Frequent Core Bus Network (73%): first/last mile connections; extended hours; innovative strategies; amenity improvements; increase bus frequency • Innovative Mobility Models & Programs (8%) • Fare Programs (15%): seniors, disabled, low-income, students. • Bus Stop Amenities (4%)	8% (of total funds)	• The VTA Board of Directors adopted specific guidelines specific to program (Oct/Nov 2017 meetings) • The bus stop improvements will be prioritized based on VTA's Transit Passenger Environment Plan and ongoing maintenance needs.	• 2016 Measure B website. • VTA Complete Streets reporting requirements will be required for all capital improvements projects

1.4 Broward County, FL – Transportation Surtax

Broward County is in southeastern Florida. With a population of almost 2 million, it is the second most populous county in the state. In November 2018, voters approved a 30-year 1% **transportation surtax, Penny for Transportation,** that took effect on January 1, 2019 (30% of the tax is provided by visitors). Funds are distributed to over 1,100 countywide and municipal projects that create connectivity, improve traffic system management, improve transit service, enhance multimodal options, and provide economic development and benefits to local businesses, workers, and residents in the program. The program is expected to generate $15.6b in revenue.

The County has created a regulatory framework to decide which entity reviews, approves and operationalizes the projects in this program:

- The surtax program is project-based and not allocation-based. Among other factors, conditions of existing facilities are given consideration. In order to be able to prioritize and compare the needs of the participating municipalities, a quantitative process is deployed.
- The County's Metropolitan Planning Organization (MPO) is mandated to review, rank, and recommend municipal projects related to enhancing connectivity and alleviating traffic congestion using the Metropolitan Transportation Plan or Complete Streets and Localized Initiatives Program methodology.
- The County is tasked with reviewing and ranking municipal capital and Rehabilitation and Maintenance (R&M) projects, ranked under separate criteria which is shared with municipalities and made available on the PennyForTransportation.com website. An independent oversight board approves and oversees the program's expenditures.

The Mobility Advancement Program administration operationalizes the oversight board's responsibilities. It reports to internal and external stakeholders about surtax processes, measures progress and performance reporting, secures financial and program audits, prepares the surtax budget for oversight board approval, and provides legal support to the oversight board for project eligibility determinations.

It is also charged with consistently and transparently presenting surtax program-related program information to the public, by participating in meetings, conferences, and events to promote and answer questions about the surtax. The PennyForTransportation.com website is updated frequently to serve as an educational and outreach tool for residents, businesses, and stakeholders. The website includes a map of all surtax-funded projects in the County that can be filtered by category and shows the project's cost and expected completion date. This tool (see Figure 6) is will be replaced with a public dashboard offering interactive up-to-date map tools with narrative and visual project details. This year, meetings and events will be accessible on Facebook Live and Instagram TV, and MAP will also increase its online presence through Twitter.

Figure 6: Funded projects from PennyForTransportation.com

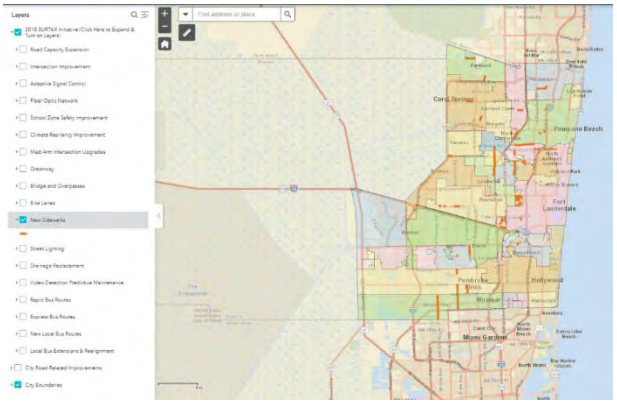


Table 4: Broward County Overview

Funding Recipient	Program Type	Proportion of funds received (FY21 budget)	Project Selection Criteria	Monitoring/Reporting
MAP Administration	• General Fund • MAP Admin and other operating costs • Greenways Master Plan	~0.8%	Scoring methodology for municipal projects is based on: • Ability to alleviate congestion • Ability to enhance connectivity • Project readiness • Emphasis on community • Interlocal agreement City applicants are asked to provide details related to: • Type of work • Phase of work (i.e. planning, design, construction) • Project status • Design state	The Pennyfortransportation.com website provides a Surtax Funded Projects Dashboard, which allows the public to view: • Projects by location • An overview of all projects • Projects by municipality; and • Projects by district. Users can filter by project type, such as bike/pedestrian, intersection, greenway, etc. For each project, they can see the type, phase, year of award, description, funding amount, and geographic coverage.
Capital Projects	• GC East Transit Intermodal • Transit • Transitways • Transit infrastructure • Public works highways • Regional transportation	~36%		
Transit operations	• Transit Operating Fund • Community shuttle buses	~10.8%		
City projects	• Municipal capital projects • Community shuttle expansion	~5.5%		
Reserves	• Transitways • Transit Infrastructure • Port to Port and East West Connectors	~46.6%		

1.5 Miami-Dade County, FL – Half Cent Sales Surtax

Miami-Dade County is just directly south of Broward County and encompasses the Miami metropolitan area. In 2004, voters passed a half-cent sales surtax that would fund the People's Transportation Plan. Just prior, municipalities, Community Planning Council members and Miami-Dade County residents weighed in on their transportation priorities for the People's Transportation Plan, a $17 billion business plan for adding more buses and routes, improving service, expanding rapid transit, and creating transportation and construction-related jobs over the next 25 years in Miami-Dade County.

20% of the surtax goes directly to municipalities on a pro rata basis, based on the city's population, for use on local transportation and transit projects. Cities are eligible to receive this money if they adhere to the following, based on the Code of Miami-Dade County:

- continue to provide the same level of general fund support for transportation that is in their FY01/02 budget in subsequent fiscal years;
- use the funds for circulator buses, bus shelters, bus pullout bays, and on-demand transportation services; and
- do not expend more than 5% on administrative costs, exclusive of project management and oversight for projects funded by the surtax.

The Citizens' Independent Transportation Trust (CITT), comprised of 15 members appointed by the Board of County Commissioners, County Mayor, and Miami-Dade League of Cities, is charged with overseeing these funds. The municipality does not need prior approval of the CITT to select transportation and transit projects, but must agree that the CITT can monitor, oversee, review and investigate the City's implementation of any project funded by the surtax. Cities are required to report on their activities to the CITT on a quarterly and annual basis, and this documentation is available on the Miami-Dade County website. The CITT has implemented a reporting schedule policy whereby municipalities that fail to submit a report to the CITT on time will receive a notice of non-compliance 30 days after the due date of the report. If the municipality fails to provide reporting after three notices of non-compliance, the CITT withholds surtax funding.

Figure 7: City of Miami Gardens Trolley, subsidized by the half penny surtax

Table 5: Miami-Dade County Overview

Funding Recipient	Program Type	Proportion of funds received (2019)	Project Selection Criteria	Monitoring/Reporting
Capital Expansion Reserve Fund	• SMART Plan (TOD, BERT Network, PD&E Studies • Golden Glades Multimodal Transportation Facility Improvements • Transportation Planning Organization Project Implementation Plan • Park-and-Ride	4.28%	Board of County Commissioners adopted Resolution R-1202-10: required that the funds from Capital Reserve Fund be used for debt service on MIC-Earlington Heights projects as well as other improvements, including North and East-West Corridor expansion projects	
Office of the CITT	• Staff time	0.9%		
Public Works Pay As You Go Projects	• Right of Way Acquisitions • Traffic Operational Improvements • Lane widening • Neighborhood Improvements Program • Major Highway and Road Improvements	1.1%		
Transit Operations and Maintenance	• Bus service improvements (Golden and Patriot Passport programs, minibuses, bus fleet increase/replacement) • Metromover • Expand bus stop signage, IT at stops/stations • Misc. Capital Improvements (track and guideway rehabilitation, fare collection system replacement, rail vehicle replacement, bus maintenance, central control modernization)	33%		• Passport program issuance numbers • Metrobus Fleet Inventory • Trust member site visits • On-time performance • Mean distance between failures • Complaints per 100k boardings

Municipal transportation projects	• Circulator buses • Bus shelters • Bus pullout bays On-demand transportation services	20%, split as follows per municipality: • Minimum 20% on transit • Max. of 80% on other transportation- related projects	City does not need prior approval of the CITT to select transportation and transit projects, but must agree that the CITT can monitor, oversee, review, and investigate the City's implementation of any project funded by the Municipal Share	• Municipalities are required to report to CITT on annual and quarterly basis • CITT withholds funding if municipalities fail to comply with reporting policy and are given three warnings
Debt Service Expenses	•	32.3%		•

2 Programmatic Case Studies

Steer has collated research into four specific focus areas which represent the Countywide Transportation Programs which combined, receive 50% of total funds. The findings detailed in the following narrative provide information on best practices for similar programs across the country. These include:

1. Transit Operations/Senior Mobility Programs
2. Intelligent Transportation System (ITS) / Smart Corridor
3. Safe Routes to School (SRTS)
4. Stormwater Pollution Prevention

2.1 Transit Operations/Senior Mobility Programs

The Measure M FY18/19 Annual Performance Report (February 2020) highlights that 22% was allocated to projects within the above program (equivalent to approx. $1.624m).

SamTrans is a public transport agency serving San Mateo and the Bay Area, providing bus service throughout San Mateo County and into portions of San Francisco and Palo Alto. The San Mateo County Transit District (SMCTD) provides a pre-arranged paratransit service (Redi-Wheels on the bayside of the county, and RediCoast on the coastside). In addition to Measure M funding, SamTrans receives funding for this program (alongside several others) through Measure W Congestion Relief Plan (established in July 2019), with 50% of the agency's amount allocated towards County Public Transportation System Investments to 'maintain and enhance bus, paratransit, rail and countywide mobility services. This is equivalent to approximately $40m per fiscal year, which demonstrates other high sources of funding are available for senior mobility transit in San Mateo County besides Measure M.

SamTrans' Mobility Plan for Older Adults and People with Disabilities (2018) alludes to key opportunities and challenges with regards to these Countywide Transportation Programs. Note that the aforementioned Measure M funding mechanism has since been established and now supports some of the future programs identified. Opportunities and potential future programs include the following:

- RediWheels passengers increasingly have access to a cell phone/ internet – enhanced communications system (on-demand transportation services).

- Increase provision of wheelchair accessible taxis (or source alternative modes), and discount taxi program[2].
- Door-to-door and door-through-door service.
- Expanded Get Up & Go (a local community-based transportation service).
- Short-distance service to connect with SamTrans and Caltrain.
- Bespoke senior mobility trip planning and improved outreach/ communication program[3].
- Safe routes to transit.

The following case studies explore interesting and innovative Senior Mobility programs.

2.1.1 Freedom in Motion, Gainesville, FL – Discounted Uber Rides for Seniors

The Freedom in Motion program was originally launched as a six-month pilot program in 2015, initially only available to seniors living in Turkey Creek Forest and a downtown residential complex in Gainesville. The program is still running today however following its success, and is now available to more Gainesville residents.

The program is a collaboration of Uber, City of Gainesville, Eldercare of Alachua County and the Gainesville Area Chamber of Commerce, and provides subsidized Uber rides to registered Eldercare residents of over 60 years. The program, which was initially funded with a $15,000 city grant, whereby participants pay only $1-5 per ride, based on their income level. The remaining cost of the Uber ride is covered by the program's funds provided by the municipality.

If needed, eligible seniors can also request to receive a limited capacity smartphone to enable them to hail rides through the service.

The program budget for 2017 was reported at $36,000.

2.1.2 SilverRide, Bay Area, CA – Private Door-through-Door Rides

SilverRide is a vendor that offers door-through-door assisted ride assistance, through a pre-booking system. Trips are typically undertaken in private vehicle and can be round-trip or multi-stop assisted rides for variety of trip purposes (including medical pick-ups).

Operates across San Francisco Bay Area and Kansas City areas.

There could be a possible partnering opportunity between SilverRide and SamTrans to enhance this service in San Mateo County.

[2] Programs already under development by SamTrans (October 2018), for example SamTrans' Ride Now subsidized taxi service.

[3] See above

2.1.3 HealthTran, MO – Effective Marketing for Non-Urban Trips

Missouri Rural Health Association (MRHA) was developed to support rural communities' health care through a set of programming, including HealthTran. HealthTran provides its members with services to increase transportation options for health and wellness appointments in designated regions throughout rural Missouri.

The program has developed innovative mobility strategies, including a flexible system to coordinate and schedule rides within minutes or up to one month in advance through a one-stop technology platform. Trained mobility managers (employees of a member organization located in each region) are able to access multiple transportation options including local public and private transportation vendors, ambulance services and volunteer drivers through this single platform. Additional attention is given to individuals identified with transportation barriers.

An effective marketing strategy at the outset facilitated program success, as eight transit providers in Missouri learned about the strategy and collaborated to provide more transportation options. Organizations or communities interested in offering HealthTran services sign up to become members, which is typically followed by a community launch event to initiate the program. Healthcare providers refer patients to a HealthTran coordinator who links the patient to the most appropriate transportation option available. Program success is measured in terms of reduced missed appointments, passenger satisfaction, annual increase in trips and reduced healthcare costs.

The program budget for 2018 was approximately $260,000, with funding provided from Section 5310 grants, health plans and private foundations.

2.1.4 Way2Go, Ithaca, NY – Community Mobility Education

Intensive stakeholder engagement was deployed to understand current challenges and deficiencies in the local mobility system across Tompkins County. It was found that the community and mobility operators did not have a strong understanding of available countywide services. As a result of this, Way2Go was developed to become a consumer-centric, community mobility program, with several partners including Human Services Coalition, the Ithaca City School District, Ithaca Carshare, AARP, and Department of Social Services.

Public engagement with rural and urban communities is an intrinsic part of the program to understand service gaps and help develop new community mobility solutions.

The education program was selected in 2020 to receive support from the Shared-Use Mobility Center Mobility-on-Demand (MOD) On-Ramp program. It is anticipated a Mobility as a Service (MaaS) pilot will be launched for Way2Go.

The TConnect on-demand weekend service 2-year pilot was further launched in August 2020 to help rural residents access TCAT's existing bus routes. Riders can transfer for free to other TCAT routes.

The program funding in 2019 was $221,300.

2.1.5 COVID-19 Response, multiple agencies

2020 brought many challenges to the transportation industry, and senior mobility was no different. Below are listed examples of creative responses to COVID-19-related challenges:

- The **Dallas Area Rapid Transit (DART)** launched its grocery pickup and delivery services in April 2020 with the help of its paratransit drivers for paratransit customers. Paratransit drivers can collect grocery orders for riders direct from store and deliver for free. DART was also involved in distributing care packages to seniors who participate in the Dallas Park and Recreation Active Senior Adult Program.
- **Metro Mobility, Minneapolis** is using Trapeze's paratransit software, PASS, to deliver groceries and household essentials to its paratransit clients (who can order online).
- **DARTS, Ontario** supports bus passengers with mobility aids requiring lowering platforms (for wheelchairs) which may not be available from rear-door loading. When a "stranded" passenger is at a bus stop, Trapeze PASS software can detect this and DARTS sends a paratransit vehicle to pick them up at the bus stop and take to end destination (intended end bus stop, home, etc). DARTS is also using paratransit vehicles to transport both non-DARTS users and DARTS customers to COVID testing sites, based on information received from the Public Health Department.

2.2 Intelligent Transportation System (ITS) / Smart Corridor

The San Mateo County SMART Corridor is a $35 million ITS designed to improve mobility along the Highway 101 corridor in San Mateo County. Elements include communications, directional signs, closed-circuit television cameras, power supply lines and equipment, and vehicle detection systems. As of this year, all underground work for fiber optic installation is complete and is undergoing testing, while aboveground work is ongoing.

Other SMART corridors in the Bay Area include I-80 and I-880, the most heavily utilized routes for commuters and goods movement. The I-80 corridor is a $80 million project funded by State Proposition 1B, the Contra Costa Transportation Authority's Measure J, and Alameda County's Measure B. The I-880 freeway, which connects Alameda County to Silicon Valley, is a $19 million project funded by Federal Congestion Mitigation and Air Quality Improvement (CMAQ) funds. Both SMART corridors are using ITS on arterial streets to redirect motorists safely and efficiently back onto the highway in case of an accident. Project components include signal coordination, communications equipment, wayfinding signs, traffic sensors, ramp meters, etc.

2.2.1 Hamberg, Germany and Durham, UK – Thermal Imaging

In Europe, case studies show thermal imaging being used to collect real-time information and communicate with motorists.

- **Hamburg**, one of the most congested cities in Germany, has installed thermal imaging technology to traffic and streetlights that allow authorities to "see" data-points. Cameras are interconnected via a cloud-based system that allows for high-resolution and real-time information to be collected.
- **Durham** (UK), has also installed thermal imaging sensors onto pre-existing road signs to build a collision avoidance system that has reduced the number of collisions. These include electronic road signs that detect a passing object and eventually can provide early warnings to drivers to prevent heavy breaking.

2.2.2 33 Smart Mobility Corridor, Columbus, OH – Smart Corridor Technology for Pilot Testing

The 33 Smart Mobility corridor, Ohio calls itself a "living lab." It is a 35-mile highway corridor northwest of Columbus that crosses three counties and connects multiple employment hubs, including Honda's North American campus, R&D firms, manufacturers and logistics companies.

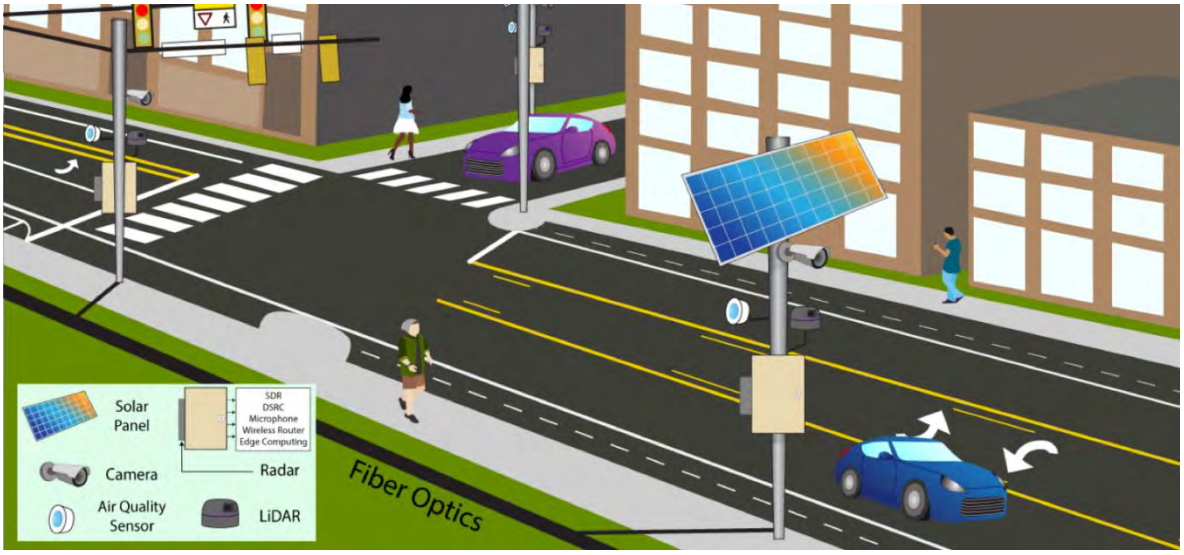
The fiber network allows automotive testing, R&D and manufacturing firms to test smart and AV technologies. The network connects with data generated from embedded wireless sensors along the highway that provide accurate traffic counts, weather and surface condition monitoring, and incident management improvements.

The Corridor is also studying the use of drones to monitor traffic and roadway conditions from the air along the corridor in conjunction with the state's traffic camera system. The drone will interact with the sensors and communication equipment to feed data into the state's traffic management system.

2.2.3 Smart Corridors in Tennessee, CAV Testing

- **The Interstate 24 Smart Corridor** is experimenting with technology in anticipation of automated vehicles (AVs). It is testing adaptive traffic signals with connected and AV priority/pre-emption capabilities.
- **The MLK Smart Corridor** in downtown Chattanooga has become a test bed for research in smart city developments and connected vehicles in a real-world environment, used as a platform to deploy, test and validate various technologies. The corridor's community-owned fiber-optic infrastructure is leveraged to provide insights into traffic patterns, with information shared to Chattanooga Department of Transportation (CDOT) to optimize investments and strategies around future transportation, improving safety and environmental benefits.

Figure 8: Illustrative Rendering of the Chattanooga MLK Smart Corridor



2.2.4 Traffic Management Centres (TMCs), British Columbia, Canada

TMCs are used for collecting real-time transportation information and communicating this to the public, 24 hours a day, seven days a week, via several media platforms.

- **City of Surrey** has implemented, expanded, and enhanced their own TMC as part of the Smart Surrey Strategy. Beyond its regular operations, the TMC has become a living lab for ITS, with rich data being gathered in real time from over 400 traffic cameras across the municipality's network, permanent traffic counters, an adaptive traffic signal control system, and the first operating pedestrian thermal sensors in Canada. The development and ongoing operation of the multi-million-dollar TMC requires collaboration between many city departments and is fully connected with fiber to the provincial TMC.
- **The BC TMC** is based in Coquitlam (Metro Vancouver) and is equipped with multiple data sources to enable staff to respond quickly to incidents by alerting travelers and coordinating with emergency response agencies and maintenance contractors to manage traffic using detour routes, counter-flow lanes and overhead Dynamic Message Signs. Sharing information with municipalities and other agencies is a big reason for the facility's success; 27 partnerships, including data and fiber-sharing agreements, allowing TMC staff to share video images, traffic data and fiber optic cable for the benefit of travelers.

2.3 Safe Routes to School (SRTS)

The Measure M FY18/19 Annual Performance Report (February 2020) highlights that 6% was allocated to SRTS projects (equivalent to approx. $443k).

2.3.1 COVID-19 Response, multiple agencies

The shift to remote learning due to COVID-19 has prompted SRTS programs nationwide adapt their programming.

- **Marin County**'s SRTS team has developed and made available online grade-specific remote learning lessons for students on pedestrian and bike safety.
- The **Alameda County** SRTS program has made available online its presentations and resources for everyone as well as for each grade level. Some of these include information on self-guided walking and biking tours, a "Safe Routes Movie List," a "Safe Routes Reading List," bicycle coloring sheets, videos on transportation, pedestrian and bike safety; among many others.
- The **Champaign-Urbana** SRTS program in Illinois started a "Superheroes Cycle" campaign in lieu of Bike to School, in which registered students shared photos of their routes on social media and received a free Superheroes T-shirt. It also encouraged students to try the "Strava App Challenge," in which users would use the Strava app to draw pictures on their tracked routes.
- Oregon Metro in the **Portland** region has released a SRTS Toolkit that outlines strategies for adapting the program to COVID-19. In addition to the remote learning strategies listed above, it also presents school commute strategies and the infrastructure needed to implement them, such as school streets, sidewalk extensions, one-way streets, traffic playgrounds, and bus loading zone markings and sites.

2.4 Stormwater Pollution Prevention

The San Mateo Countywide Water Pollution Prevention Program (SMCWPPP; with 'Flows To Bay' comprising the public outreach arm), was established in 1990 to reduce the pollution carried by stormwater into local creeks, the San Francisco Bay, and the Pacific Ocean. The program is a partnership of the C/CAG, each incorporated city and town in the county, and the County of San Mateo, which share a common National Pollutant Discharge Elimination System (NPDES) permit. All other Bay Area counties also hold a NPDES permit.

The Municipal Regional Permit (MRP) outlines the State's requirements for municipal agencies in San Mateo County to address the water quality and flow-related impacts of stormwater runoff. Some of these requirements are implemented directly by municipalities themselves while others are addressed by the San Mateo countywide program on behalf of all the municipalities.

The Measure M FY18/19 Annual Performance Report (February 2020) highlights that 12% was allocated to NPDES and MRP admin and projects (equivalent to approx. $885k).

2.4.1 Various Counties – Community Based Public Private Partnership for Green Stormwater Infrastructure

- **Prince George's County**, Maryland, was the first municipality to utilize the CBP3 model as a solution to the challenges that are facing many jurisdictions across the US in meeting federal regulatory stormwater compliance requirements. Through its **Clean Water Partnership (CWP),** Corvias Group LLC and Prince George's County have entered into a 30 year partnership to improve the stormwater infrastructure and make a commitment to impact the local economy through "local" targeted disadvantaged subcontractor development and utilization. The CWP is tracking to plan, design, and construct green infrastructure retrofits across 4000 acres of impervious surfaces in Prince Georges County (including a diverse mix of sites and land uses).
- Ann Arundel County's (also Maryland) **P3 Waterway Improvement Project** was established in 2017 and maximizes technology and creativity through private sector partners (e.g. RES, AECOM and Opti) to support water quality projects. The contract worth $3.8m is uniquely structured to help the County better satisfy its Municipal Separate Storm Sewer System (MS4) and Chesapeake Bay Total Maximum Daily Load (TMDL) permits and goals by partnering with the private sector.
- Milwaukee Metropolitan Sewerage District's **Green Infrastructure Partnership Program (GIPP)** offers incentive funding to public, private, and not-for-profit organizations within eligible municipalities on a per-gallon-captured, reimbursement basis for green infrastructure strategies designed to capture and clean water. Projects are selected based on an established set of criteria focused on the applicant's ability and commitment to implement, maintain, and promote their project.
- City of Chester's, Pennsylvania, **CBP3** aims to build and maintain up to $50 million in green stormwater infrastructure over the next 20-30 years. The partnership consists of the U.S EPA, PENNVEST (Pennsylvania's infrastructure investment authority), Stormwater Authority of the City of Chester, private partner Corvias and Chester Water Authority.

The CBP3 approach has not been implemented in California to date, however the City of Los Angeles has initiated this direction using their Measure W funding. The City of Salinas has also previously released a tender (November 2019) for establishing such a partnership.

Considerations

The case studies explored in this document provide examples from which the Measure M Strategic Plan may draw inspiration. In particular, the strategy will likely call on three key areas of focus from this review:

1. **Allocation and administration**: Many of the case studies explored in Section 1 are more selective with their allocation of funds. This provides the agencies with more control over outputs elicited from the funding itself, but it requires additional administration. The strategy will aim to strike a balance between reasonable levels of administration and the ability to influence use of funds for new or targeted purposes.
2. **Reporting**: All of the case studies outlined in Section 1 require funding recipients to report success. The strategy will build off of those best practices to develop recommendations for refining and restructuring Measure M's required reporting guidelines.
3. **Innovation**: Measure M funding's flexibility provides opportunity for the funding to be spent advancing countywide programs and testing new products, policies and technology. The case studies in Section 2 of this document provide best practices for innovative approaches to all four Countywide Transportation Programs, and may be used to help guide Measure M funding toward new applications.

C/CAG
City/County Association of Governments
of San Mateo County

america's
coolest airport

Long Beach Airport
Organizational Plan

October 2021

long beach
airport

our **mission**

... is our core purpose, and our reason for existence.
It defines what we are here to do, and why we do it.

"Connect and serve **our community,** and promote economic development"

OUR MISSION EMBRACES OUR COMMITMENTS TO:

Connect individuals, friends, families and cultures

Serve our customers, our business partners and our stakeholders

Our Community
the City of Long Beach and neighboring areas

Economic Development
driving local prosperity, well-being and quality of life

our **vision**

... is what we aspire to be,
our collective ambition for the next 10 years.

america's **coolest** airport

ACHIEVEMENT OF OUR VISION IS DRIVEN BY FOUR COMPLEMENTARY ELEMENTS:

Experience Cool - Most distinctively stylish airport – service, amenities and architecture

EcoCool - Recognized leadership of sustainable airport practices

Development Cool - A model for community-compatible economic development

Working Cool - Most desirable airport workplace – staff loves where they work

our
core values

... are a set of guiding principles that together define what we believe in and how we intend to work with one another, and with our stakeholders.

Collaborative

Work as a team

Communicate honestly,
transparently, effectively

Responsible

Dedicated, safe, accountable,
professional, trustworthy,
invested-own what we do

Proud to manage public asset
on behalf of community

Respectful

To all colleagues, customers,
City and community representatives

Flexible

All wear many hats in a small airport

Adapt to change, and to specific
customer requirements

Friendly

Accessible, informal, helpful,
easy to work with

Creative, passionate, fun

our **strategic** goals & **objectives**

Goal 1
Deliver an **outstanding customer** experience

Develop and implement an innovative customer experience plan

- Develop & maintain customer-pleasing facilities and amenities

Goal 2
Be a **green** airport **leader**

Adopt environmentally friendly policies and incentives to promote carbon neutrality

- Implement sustainable business and operational practices

Goal 3
Foster responsible **development** and strong community **relationships**

Strengthen community relationships

- Pursue community-compatible air service development
- Partner with businesses to optimize commercial development

Goal 4
Promote **organizational excellence**

Attract, develop, and retain talent in an organization structured for success

- Promote trust, communication and collaboration
- Define policies and procedures to optimize efficiency, effectiveness and safety

special **thanks**

to our entire staff for engaging and providing feedback on this plan, including the teams who conducted multiple online sessions to develop the key elements of the presented plan

LGB Executive Team

Cynthia Guidry | Director

Juan López-Rios | Deputy Director

Claudia Lewis | Finance and Administration Bureau Manager

Ron Reeves | Operations Bureau Manager

Ken Mason | Executive Assistant

Organizational Plan Design Team

Harley Alcorn

Suzanna Brandao

Matthew Brookes

Mony Chhey

Tony Esparza

Scott Garrett

Scott Korobkin

Kate Kuykendall

Hugo Liu

Ryan McMullan

Ambi Thurai

Dale Worsham

Karl Zittel

A1.6 References

References from past projects are included below along with their direct contact information.

Project	Client Contact	Information
Long Beach Airport	Cynthia Guidry Director, Long Beach Airport	Cynthia.Guidry@longbeach.gov (562) 570-2605
Metrolink	Roderick Diaz, Director Planning & Development	DiazR@scrra.net 213-452-0455
CCAG	Kim Wever, Transportation Program Specialist City/County Association of Governments (C/CAG)	kwever@smcgov.org 650-599-1451

A1.7 Consultant Office and Staffing Plan

The following section describes in more detail our staffing plan and rational, including details about our Bay Area office.

- **International Expertise -** Steer is an international consulting firm operating in multiple cities in North America. We have selected staff members for this project based on their previous experience developing strategic plans for large public agencies. Staff members are based in the Bay Area , as well as Los Angeles, Toronto, Washington D.C., Boston, and Vancouver.
- **Local Knowledge and Resources** - We currently maintain a Bay Area Office located in Oakland with roughly 12 staff members. Two of our expert advisory team for this project are based in this office. They offer local expertise and knowledge in addition to many years of experience developing strategic policy for transportation agencies throughout California. Our Oakland office accommodations include several meeting rooms and venues that can accommodate internal/external meetings as needed.
- **Blended Virtual/In-Person Approach** - The majority of interviews, workshops, and other meetings will be conducted using Microsoft Teams or an alternative online platform of your choice. This provides an additional challenge in a project whose success is dependent on the ability to harness the creativity of groups and develop broad engagement. However, meeting virtually also presents opportunities: for example, instead of conducting staff meetings with multiple sessions over an entire day, it can be equally efficient (or more so) to split the creative effort into a series of shorter meetings each with a specific objective. Our team is adept at using web platforms and tools to work collaboratively across geographies and have employed blended in-person/virtual engagement programs to work with staff and executives with successful outcomes.

Table 3.1 Staff Plan by Office and Availability

Staff	Role	Location	Availability
Patrick Miller	Project Director	Toronto, CAN	50%
Kate Bridges	Project Manager	Los Angeles, CA	50%
Richard Batty	Expert Advisor	Washington D.C.	30%
Steve Van Beek	Peer Review	Washington D.C.	20%
Julia Wean	Senior Advisor	Boston, MA	20%
Michael Snavely	Senior Advisor	Oakland, CA	20%
Emily Alter	Senior Advisor	Oakland, CA	20%
Heny Kosch	Consultant Support	Vancouver, CAN	50%
Erika Kulpa	Consultant Support	Los Angeles, CA	50%
Rebecca Nelson	Consultant Support	Toronto, CAN	50%

The following individuals will serve as primary contact for the contract negotiation and project delivery period:

Table 3.2 Primary Contact

Contact Person	Information
Contract Negotiation Alasdair Dawson, Regional Director	(213) 425-0941 Alasdair.dawson@steergroup.com SPACES, Sacramento, 1610 R Street, Suite 300, Office # 411, Sacramento, CA, 95811
Project Delivery Patrick Miller, Project Director	(416) 360-0227 Patrick.Miller@steergroup.com 40 University Avenue, Suite 606 Toronto, ON M5J 1T1, Canada

B Proposal Requirements

B1 Item 9b) Litigation Statement

Steer Davies & Gleave Inc. hereby confirms that we do not have any litigation in connection with prior projects.

Signature of Authorized Representative:

Name: Alasdair Dawson

Title: North America Regional Director, Steer

Date: November 15, 2023

B2 Item 9c) Contract Agreement

Steer Davies & Gleave Inc. hereby confirms that we do not requests any exceptions from the standard Contract Agreement included as Appendix C, Sample Agreement Template

Signature of Authorized Representative:

Name: Alasdair Dawson

Title: North America Regional Director, Steer

Date: November 15, 2023

B3 Item 9d) Insurance Provisions

Steer Davies & Gleave Inc. hereby agrees that we will provide the required certificates of insurance providing verification of the minimum insurance requirements listed in Appendix C, Sample Agreement Template, Section 11, Insurance, within ten (10) days of C/CAG's notice to firm that it is the successful Proposer.

Signature of Authorized Representative:

Name: Alasdair Dawson

Title: North America Regional Director, Steer

Date: November 15, 2023

B4 Taxpayer Identification Number and Certification

The following W-9 is enclosed as requested.

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ **Go to *www.irs.gov/FormW9* for instructions and the latest information.**

Give Form to the requester. Do not send to the IRS.

Print or type. See **Specific Instructions** on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Steer Davies & Gleave Inc

2 Business name/disregarded entity name, if different from above

Steer

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☑ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

45 Main St, Suite 1036

Requester's name and address (optional)

6 City, state, and ZIP code

Brooklyn, NY 11201

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			–		–				

or

Employer identification number

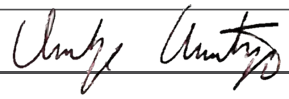
4	5	–	0	5	8	5	2	6	9

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here | **Signature of U.S. person ▶**  **Date ▶** January 3, 2023

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

Control Information

Prepared by	Prepared for
Steer 800 Wilshire Blvd, Suite 1320, Los Angeles, CA 90017 USA +1 (213) 425 0990 www.steergroup.com	City/County Association of Governments of San Mateo County 555 County Center, 5th Floor, Redwood City, CA 94063

Steer project/proposal number	Client contract/project number
245902P1	

Author/originator	Reviewer/approver
Kate Bridges	Patrick Miller

Other contributors	Distribution	
Julia Wean	Client:	Steer:

Version control/issue number	Date
V1.0	11/16/2023

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QUALITY SYSTEM CERTIFICATION DNV·GL ISO 9001:2015

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