

SMART Citizen's Oversight Committee Agenda Item 8 - Strategic Plan Discussion August 30, 2023





2019 Strategic Plan



Strategic Plan

Purpose

- Helps define the strategic direction of the organization
- Aids in establishing objectives and goals which are in line with the vision and mission
- Defines a plan to achieve the objectives and goals
- Promotes collaboration, collective responsibility, and accountability

Why Now?



2019 Strategic Plan
adopted in November 2019

Needs to be updated every 5 years
Was schedule to start next year
May want more time to preparing



Marin County Civil Grand Jury Report



Funding

COC Duties



Provide input and review the Strategic Plan and subsequent plans; receive periodic updates on significant financial matters not previously identified in the Strategic Plan or annual budget that may materially impact the previously adopted Strategic Plan.



Hold meetings Quarterly and issue reports, on at least an annual basis, to inform and update the SMART Board and the Sonoma and Marin County residents on any developments related to the implementation, planning and advancements of the Strategic Plan.



Receive briefings on financial, budgetary, capital plans and other strategic planning matters that may have a material impact on the District and provide updates to the SMART Board of Directors at least bi-annually.

Outline of Strategic Plan

Vision

Mission

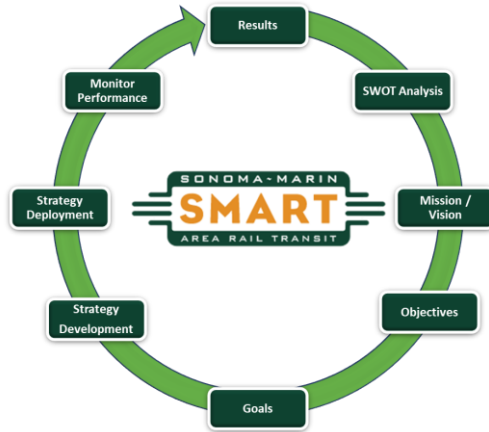
Values

SWOT
Analysis

Objectives

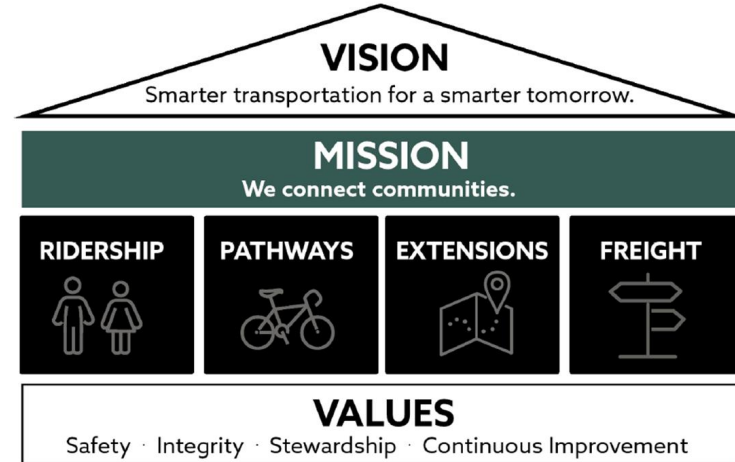
Action
Plan

Strategic Plan

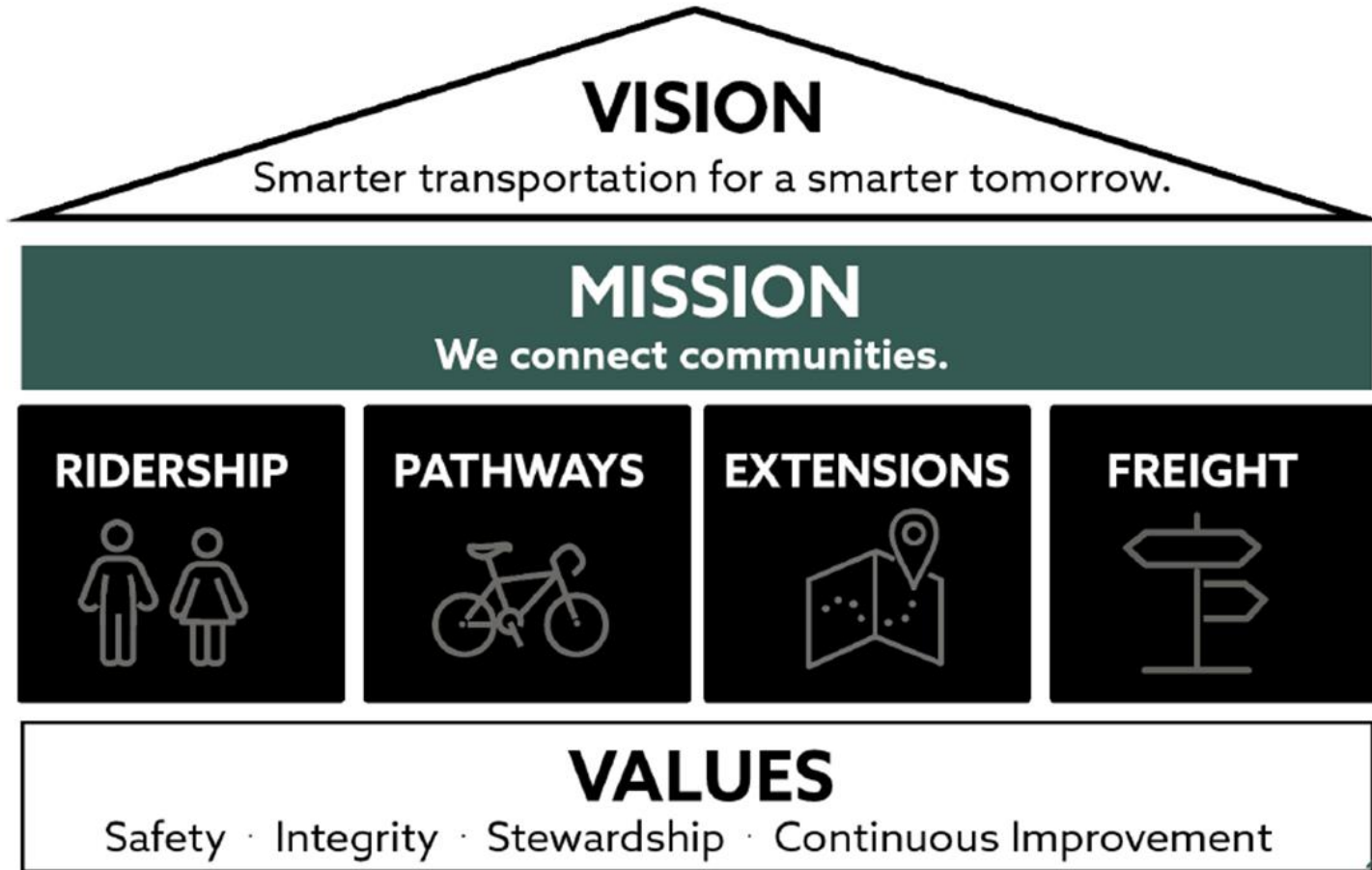


S.W.O.T. Analysis

S	Strengths <ul style="list-style-type: none"> Dedicated highly skilled staff Safe and reliable service Modern/comfortable train Strong bi-directional commute patterns Infrastructure in excellent condition Bike/train synergy Successful at identifying/securing funds Strong organizational culture 	W	Weaknesses <ul style="list-style-type: none"> First and last mile connections Single track system Early/late service Limited number of destination stations Public perception/local support Minimal staffing levels with long hiring timeline Parking capacity/paid parking Everything is a priority
O	Opportunities <ul style="list-style-type: none"> Improve strategic direction/alignment Untapped markets (tourism, students, late night, recreation, and events) Improve wayfinding, real-time info, apps, on-line presence Improve first/last mile connections Increase interaction with public and community leaders Enhance marketing efforts to target key markets Reactivate on-board amenities 	T	Threats <ul style="list-style-type: none"> Future sales tax funding Well organized and funded opponents Extension north of Windsor and east of Novato not in Plan Bay Area 2050 (limits ability to compete for grants) On-going litigation slowing projects Public trust/confidence Post pandemic (work from home) Cyber attacks Rising capital/operating costs



SMART HOUSE



SWOT Analysis

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Completed in January 2022

Current Action Plan- Ridership

- Facilitate bike share at 10 of 12 stations
- Extend Giants special service pilot through 2022 season
- Implement Microtransit pilot program at Airport Station
- Consider additional service
 - Mid-day service
 - Late night service on Friday and Saturday Nights
 - Additional event service based on anticipated demand
 - Microtransit expansion
- Work with transit providers to improve bus/ferry connections
- Model rail system to determine requirements to maintain 30/60 headways
- Look for innovative methods to restore snack bar and WiFi
- Allow overnight parking at SMART Park and Ride lots
- Closely monitor system/ridership and adjust as necessary
 - Monitor impacts of hybrid work schedules
- Implement aggressive marketing plan



Current Action Plan- Pathways

- Construct funded segments of the Pathway
- Continue to design and permit pathways
- Publish updated Pathway maps
- Develop and implement wayfinding program



Current Action Plan- Extensions

- Windsor / Healdsburg
 - Secure Funding
- Extension to Cloverdale
 - Conduct updated market and ridership analysis
 - Conduct updated freight market analysis
 - Identify/ clarify community and system benefits associated with Cloverdale extension
 - Continue to seek federal and state capital grant funding
- East/ West
 - Continue participation in Highway 37 corridor activities
 - Work with partners to incorporate rail into the project
 - Complete Caltrans rail service plan analysis
 - Partner with Caltrans and FRA Corridor ID Program through SMART East-West project development and subsequent phases



Current Action Plan-Freight

- Increase annual revenue by \$500,000+
- Decrease expenditures by \$100,000+
- Secure funding for capital/ SGR improvement (\$8.2 million)
- Market freight and storage opportunities at SMART
- Leverage storage track at Schellville and Burdell
- Promote transload opportunities at Victory Station (Schellville)
- Acquire new business
- Examine freight tariffs and consider increasing fees
- Reduce car hire fees
- Manage maintenance requirements
 - Bridges, tracks, crossings, equipment, etc.



Recent Initiatives

- ✓ Secured \$189.7M in outside grant funding (Jan 22 – Present)
 - ✓ Operating - \$27.3M
 - ✓ Capital – \$162.4M
- ✓ Fully restored weekday service levels (38 Trips per day)
- ✓ Expanded weekend service (12 trips per day)
- ✓ Extended 40% discount on fares (\$1.50 per zone)
- ✓ Developed 31-day pass based on a 3-day commute
- ✓ Suspended parking fees at SMART owned Park & Rides
- ✓ Approved overnight parking at SMART owned Park & Rides
- ✓ Improved weekend connections to Larkspur Ferry
- ✓ Facilitated Muir Woods Shuttle connection at Larkspur
- ✓ Worked with Google to improve Trip Planning
- ✓ Implemented Giants Game Service
- ✓ Implemented Free Field Trips for K-12 Students
- ✓ Expanded service to include late evening trains (Fri/Sat)
- ✓ Implemented free summer youth program June – August
- ✓ Launched Microtransit Pilot Project at Airport Station



Upcoming Improvements

- Construction of Petaluma North Station
 - Estimated completion date (late 2024)
- Building pathway segments (2023-25)
 - Petaluma to Penngrove /Rohnert Park to Santa Rosa
 - McGinnis to Smith Ranch Rd - 2024
 - More coming (Sonoma & Marin segments)
- Real-time electronic train arrival signage (Fall 2023)
- Pathway wayfinding signage (late 2023)
- Beginning Windsor Extension construction (late 2023)
 - Opening in 2025
- Healdsburg progress (bridge and pathway)
- Considering SMART Connect expansion



SMART Challenges

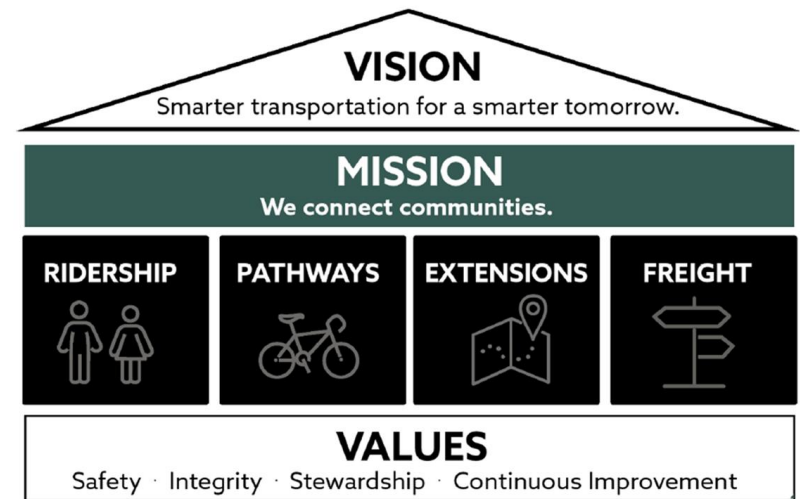
- Achieving future success requires work, commitment, and agility
- Future Challenges
 - Pandemic Impact
 - Work from home
 - First and last mile
 - Completing projects
 - Pathway
 - Rail extension
 - Measure Q (Sales Tax) expires in 2029
 - Public perception
- Focus Areas
 - SMART Train meets the needs of the community
 - SMART viewed as a **SOLUTION** in the community!



Next Steps

- Input on Strategic Plan
 - Financial Assumptions
 - SWOT Analysis
 - Strategic Objectives
 - Action Plan
- Methods
 - COC Workshops
 - Open Houses (In-person / Zoom)
 - Community Outreach
 - Local Jurisdictions
 - Business Community
 - Advocacy Groups
 - Social Service Organizations
 - Disability Service Centers
 - Transit Rider Organizations
 - Employers
 - Unions
 - Other?

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Discussion?

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