

Surviving Your First SmartTrips Program



[20 minutes, without questions] I'm Jessica Roberts, and I work with Alta Planning + Design. Our firm specializes in bicycle, pedestrian, transit, and trail planning and design, but I head our growing department that manages programs in the areas of Safe Routes to School and Individualized Marketing. My firm is currently managing two projects in Columbia, MO and Marin County, CA based on the Portland SmartTrips model. Because Linda has covered the basics of how and why SmartTrips works, you can see what an excellent program it is. I want to walk you through the first year of running a program like SmartTrips.

Funding and Partners



- Transportation Funding
 - MPO funds (flexible federal funding)
 - DOT/City general funds
 - Dedicated bicycle/pedestrian funding source (tax, bond)
 - Nonmotorized Transportation Pilot Program
- TDM
- Air Quality/CMAQ
- Job Access funds
- Transit (FTA, transit marketing)
- In-kind and/or private funds (e.g. Kaiser Permanente)
- Energy tax credits
- Public Health

SmartTrips (City of Portland)

Kaiser Permanente, Jobs Access Grant (2005), Providence Portland Medical Center (2005), TriMet, grant from Metro's RTO for Milwaukee in 2007, other Metro grants; Business Energy Tax Credits

Alameda TravelChoice (Alameda County Congestion Management Agency, AC Transit, BART, and the Alameda County Public Health Department)

Agency funding; CMAQ

In-kind: City of Alameda, City of Oakland and the San Francisco Bay Area Water Transit Authority

Neighbors on the Go (Columbia, MO) & Way to Go (Marin County, CA)

Nonmotorized Transportation Pilot Program

GoSmart Boulder (City of Boulder)

General transportation fund

Triangle Transit individualized marketing pilot (Triangle Transit) – FTA Demonstration Project

Federal Transit Administration; Triangle Transit Authority funds

Choosing a Target Area



- Places to go
 - Mix of residential and business
 - Housing density
 - Pedestrian-oriented development
- Ways to get there
 - Follow capital projects (post construction)
 - Transit, bicycling and walking infrastructure and services
- Momentum
 - Political and agency support
 - Right messenger agency

In picking a target area, you're looking for two things: places to go, and ways to get there. Picking a target area is critical. There has to be both a *where* and a *how to market* -- *that is, there have to be appealing destinations in reasonable distance from the home, and there must be reasonable ways to get there by some other mode than driving alone. You also need momentum - political, agency, and business support.*

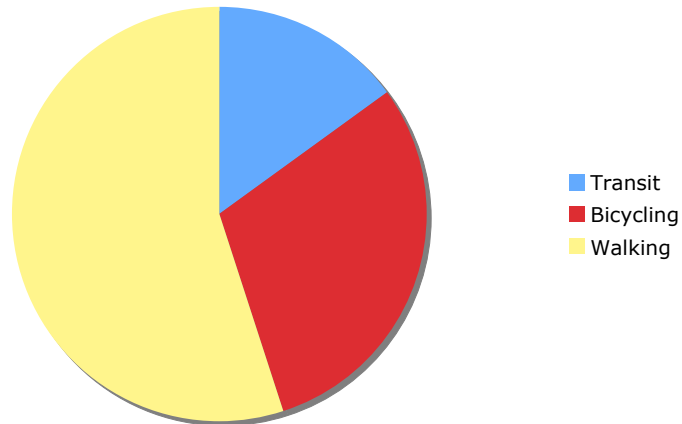
An ideal target area is one that is underperforming in modeshare compared to its potential; a perfect example is right after a major investment such as a new transit line or a downtown streetscape project, where residents may have an outdated sense of how difficult it is to get from here to there.

GIS model (census tracts) vs. subjective attribute analysis

Program Design



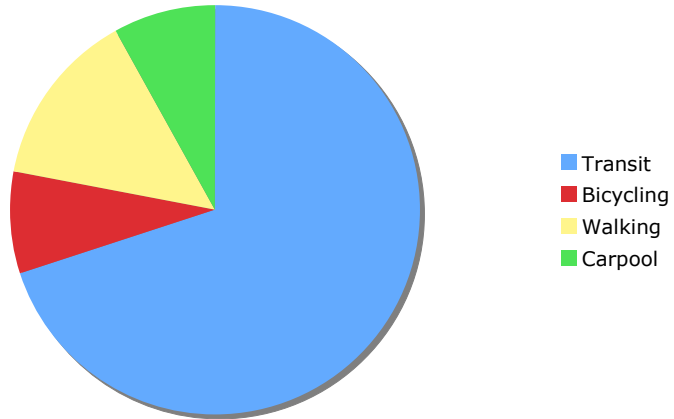
Way to Go



When designing your program, you have to find the right fit for the community culture and for the services and facilities on offer. Here's an example of the Way to Go Sausalito program, a very scenic, compact community with centralized commercial services; hilly, limited bicycle facilities; difficult to drive, so walking (esp. with shortcuts) can compete, ferry service to SF

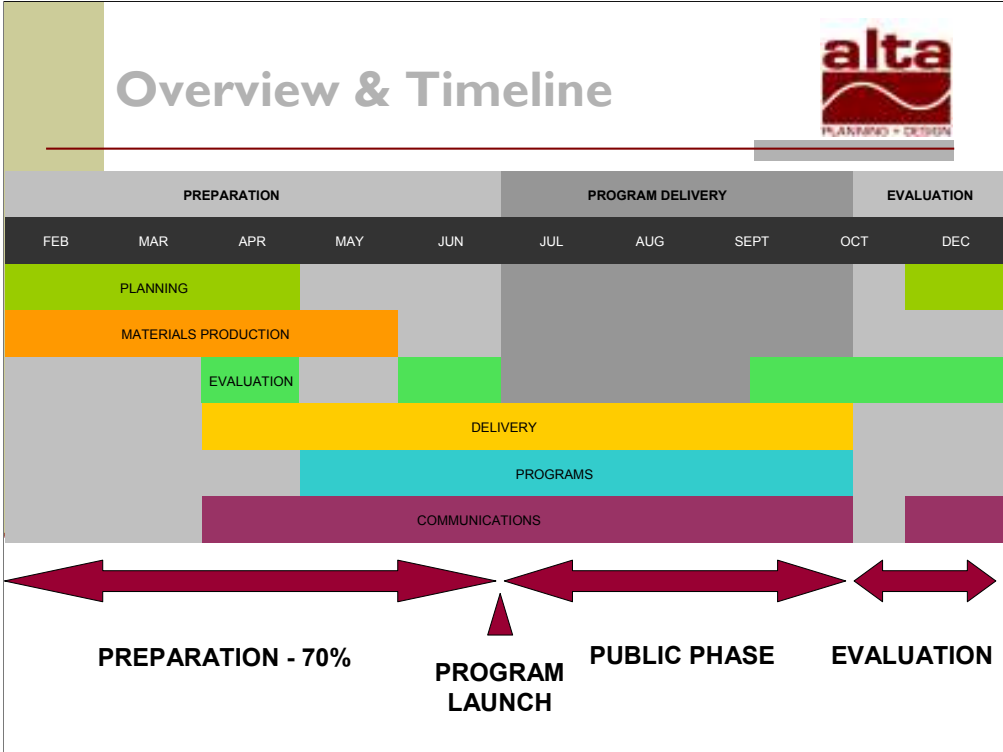
Major focus: walking to local stores; bicycling/walking to ferry; making the Golden Gate Bridge connection by bike

Transit model



As a contrast, here's a program we're planning now, where trip distance is relatively high and current transit service is underutilized; limited walking & biking potential due to facilities and land use factors

Major focus: promoting new circulator service, carpool match services, senior outreach, multimodal transit connections



Basically, every SmartTrips project has three phases: preparation, which is an intensive phase that is invisible to the public; program delivery, where the public is invited to participate and the program should be very high-profile; and evaluation, both before and after the program. This is a sample timeline from our Way to Go project in Marin County; CA; I want to point out that about 70% of the resources go into preparation. After launch, it's certainly work, but if you've done a good job of preparing, it should basically run itself.

Preparation (behind the scenes)



- Materials:
 - Branding
 - Collecting
 - Designing
 - Printing
- Develop web page & order form
- Event planning
- Perform baseline evaluation



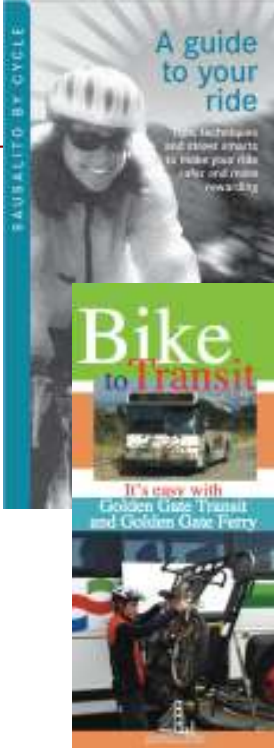
Let's talk more about what happens during the preparation phase. A major part of preparation is finding, creating, designing, and printing materials; we'll talk more about that in a moment. This is usually the most time-consuming part of the project. You must also develop your website in preparation for launch, as well as planning and scheduling events (another aspect I'll touch on in a moment). Finally, it's important to complete a baseline modeshare evaluation before the program begins.



Why are we focusing so much on materials? Materials are the key to bridging the information gap I mentioned earlier and opening participants' eyes to the many travel options they have available to them. Materials are also a tangible reminder to participants that they have identified themselves as people who are interested in driving less. At its heart, this is nothing more than a fancy materials distribution program.

Materials

- Maps
- Brochures
 - Walking to Wellness
 - Women on bikes
 - “Guide to Your Ride” (basic bicycling info)
 - Coupon book
- Transit info
 - Maps
 - Schedules
 - Brochures (bikes on transit, paratransit, special summer shuttles, senior program, etc.)
- Incentive gifts
 - Umbrella, pedometer, transit tickets, free lunch coupon, bandanna map, walking/bicycling book



Here’s an overview of the world of materials. Keep in mind that you don’t have to make all of these from scratch -- if someone has already created a brochure or map that serves your program goals, all you need is to get a big box of them.

- Maps are essential; we’ll talk about them more in a second.
- Brochures are also an important part of the program; some examples are a women on bikes brochure, a local coupon book to give people incentives to make local trips, or a walking fitness brochure.
- I’ve called out transit materials as their own category, because transit agencies are nearly always going to have maps, schedules, and brochures (such as bikes on transit brochures, paratransit materials, senior rider brochures, etc.).
- Finally, you need to secure incentive gifts that are genuinely useful and relate to the program goals, such as transit tickets, umbrellas, a book of local walks, pedometers, etc. These gifts should be valuable (not just tchotchkes), but not so valuable that people who don’t want to change their travel behavior will order materials just to get the gifts.

Materials - Maps

- Transit system map
- Trail system maps
- Bike parking/locker maps
- State/Region/City bike map

- Neighborhood maps
 - Transit stops & lines
 - Shopping districts / shops
 - Bike shops
 - Libraries
 - Schools
 - Museums
 - Parks
 - Historical/cultural sites
 - Paths/sidewalks
 - Bike routes
 - Insets: Suggested ride/walk routes



Maps are the most important type of material you can distribute, because they help create a new mental map for participants. Many people don't know where the closest transit line is or where it goes; likewise, they may only think of walking or bicycling on busy arterial streets, and not know that there is a pleasant parallel route through a beautiful tree-lined neighborhood. In other words, maps cover both the "where" and the "how" we talked about earlier. Some maps may already exist, such as transit and trail maps, but SmartTrips programs usually create a new type of map: the neighborhood map. This map focuses on the target area, and includes a level of detail that would be overwhelming at a citywide level. I'll show you two examples now.



For our Way to Go program in Marin County, CA, our target area was the entire town of Sausalito, with 8000 residents. We created a citywide map that showed every street. We didn't include every business as in Columbia, but we did include all transit lines and stops, paved and unpaved trails, bike parking, schools, libraries, public art, post offices, and more. One special aspect of this map is that it shows every staircase and walkway, which in this hilly town make for excellent, but often hidden, shortcuts. You'll note that the branding for this program is more subtle and sophisticated than the last one.

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GIS > Illustrator vs. Illustrator; use graphic design firm

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GIS: streets, zoning, property lines, parks, government buildings (post office, library, city hall)

GIS + fact check: schools, transit lines & stops, trails & pathways, park & ride, dog parks

Field work: drinking fountains, bike parking, individual businesses, sidewalks

Partners/research: public art, heritage trees, historic buildings

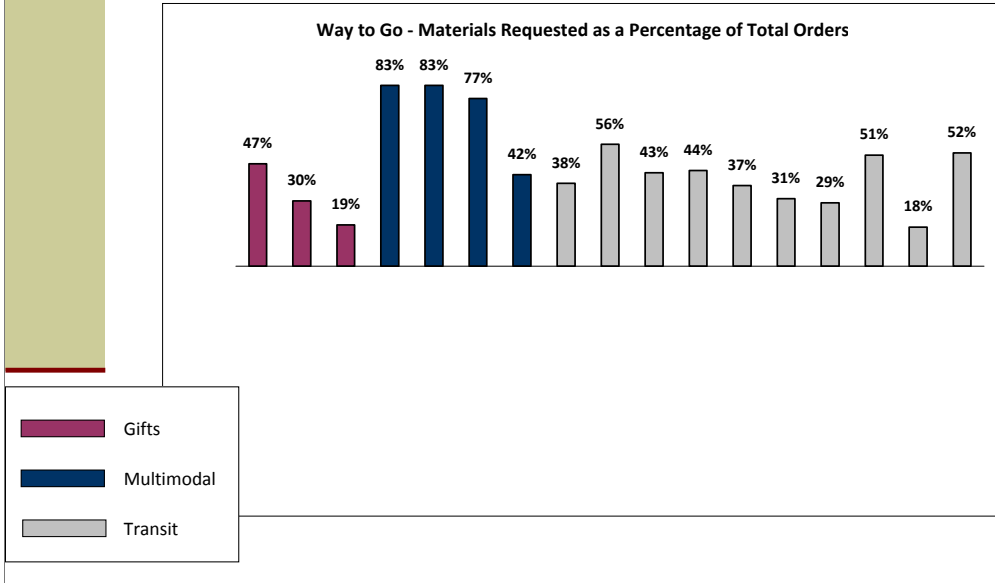


Don't forget that once you have all your materials, you need a place to store them! This stuff takes up a lot of space! And you need a well-organized work area for putting together the customized packets. It seems like a small detail, but you don't want to force your delivery staff to be taking out boxes and putting them away every time they make a packet. Pay attention to the staging details and it'll make the program run smoothly.

Materials – what to order

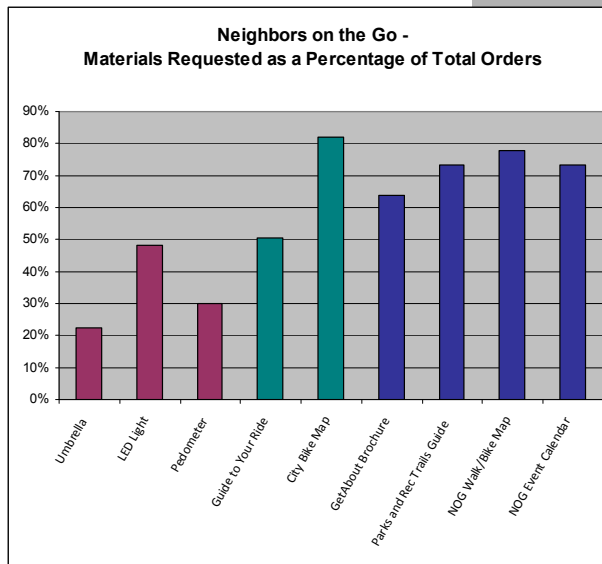


Way to Go - Materials Requested as a Percentage of Total Orders



Maps are most popular

Program-specific materials are popular (e.g. event calendars)



Maps, program materials (event calendar), trails guide

Contacting Residents



- Monthly newsletters
- “Last chance” postcard
- Weekly flyers
- City-wide email alerts
- Weekly email updates to participants
- Local media
- Chamber of Commerce

Now let's move into the public phase of the program. Once all the pieces are put in place, it's time to invite residents to participate. The first they hear of the program is a newsletter that gets sent to their home. It introduces them to the program and prepares them for the next contact: an order form of materials and incentive gifts. Residents will continue to hear about the program during the duration through monthly newsletters, and a “last chance” postcard for ordering materials. In Sausalito, we have also done direct outreach such as email alerts through the official city email bulletin, weekly email updates to participants, weekly flyering at cafes and city buildings about upcoming events, local media, and the Chamber of Commerce. Our goal is to reach every resident at least five times during the course of the program. Remember, we're competing with “real” advertising -- it's important that residents have many chances the chance to opt in!

Ordering packets

- Mail (order form, reminder postcard)
- Web form
- Email
- Booth events
- Viral: neighbor-to-neighbor



ORDER FORM

Deliver this order form side to side for FREE GIVE

Create your FREE GoKit package (check as many boxes as you want!)

FREE GIFT (please mark your preferred choice):

- Way To Go tote bag**
Carry your gear in style with this 30% cotton canvas tote bag with free logo
- LED Bike taillight**
Light your bike for safety with this high-quality 3-LED Power Bike taillight
- Transit Stickers**
Save 15¢/ride to cover the cost of a transit-eligible transit ride within Marin County (bicycles, ferry not included)
- Way To Go Coupon book**
Great offers on local food, services, and shopping if you walk or bike
- Way To Go Walk Bike Ride map**
- Way To Go Planner event calendar**
Schedule of walks, rides, workshops, and special events
- Way To Go Bike Guide to Your Bike brochure**
Tips on biking safety, gear, and rules of the road
- A Senior's Guide to Marin Transit brochure**
- Golden Gate Bus and Ferry Transit Guide**
- West Marin Stagecoach brochure**
- Golden Gate Transit Shuttle Bike to Transit brochure**
- 811: Your Bay Area RideShare Guide**
Taxis, transit, rideShare and bicycling services
- 811: Traffic Transit RideShare Bicycling brochure**
- 811: Getting There on Transit brochure**
San Francisco Bay Area route maps and popular destinations
- Marin County Safe Routes To School brochure**
- Ferry brochure (pocket size)**

The main action we want people to take is to order customized information packets. Depending on the demographics and program maturity, you should aim for 8 - 20% response. Mail is the major communication tool (here you can see one of the order forms), through the order form and the reminder postcard, but the web order form is an important tool as well, especially when you've exhausted the mail response. Finally, in-person communication gives people chances to fill out the order form as well (as you see in this photo, which was at our booth at the Fourth of July picnic). Finally, we are seeing a pattern in responses that when one person in a household or apartment complex orders a packet, their neighbors and household members are likely to order one soon afterwards, which means that people are talking to each other about the program -- which is fantastic!

Packet Fulfillment & Delivery



Finally, once order forms are completed, we pack the custom packet and deliver it by bicycle or foot (wherever possible). So far in Sausalito, we have delivered everything by bicycle; it's a proof of concept, and it also keeps costs down. As I mentioned before, our goal is 48 hour turnaround, with no more than five business days at the latest.

Events and Classes



JULY				
TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
8:00-11:00 Social and Music Appt	10:00-11:00 Open House at 1000 S. Hill St	8:00-10:00 Community Art & Appt		
7:00-8:00 Music Appt	10:00-11:00 Open House at 1000 S. Hill St			10:00-11:00 Morning Coffee and Snacks from 1000 S. Hill St



In addition to the customized packets, we offer classes and guided walks and rides to residents in the target area. For Sausalito, we have two events every week - a combination of guided walks, rides, classes and workshops. We try to theme events where possible to make them more appealing; some of our events this year have included a maritime history tour, a hidden staircases discovery walk, a sweet treats and coffee walk, and a celebrity bicycle ride with a well-known local bicycle manufacturer. Participants hear about events through the calendar, which they received in packets or at booths, in email updates, in the local paper, through flyers we put up weekly, and on several online calendars such as the Parks & Rec Department and the Chamber of Commerce. We also offer a Google calendar, and we're in the process of setting up a Facebook group for next year.

Guided Walks and Rides



The main goal of the walks is to help people put the information they are learning from the materials -- where and how to walk, bicycle and take transit -- into action. We hope that people will come for the fun of it, but leave feeling like they can better imagine themselves continuing that activity in the future.

Results: 8-20% participation; 2 - 20 people at events

Evaluation



- **Modeshare**
 - Travel diary - before & after
 - Transit user counts, bike/ped counts

- **Participation**
 - Web site visits
 - Order forms completed (by mail and online)
 - Number of materials distributed
 - Number of contacts made
 - Number of event participants

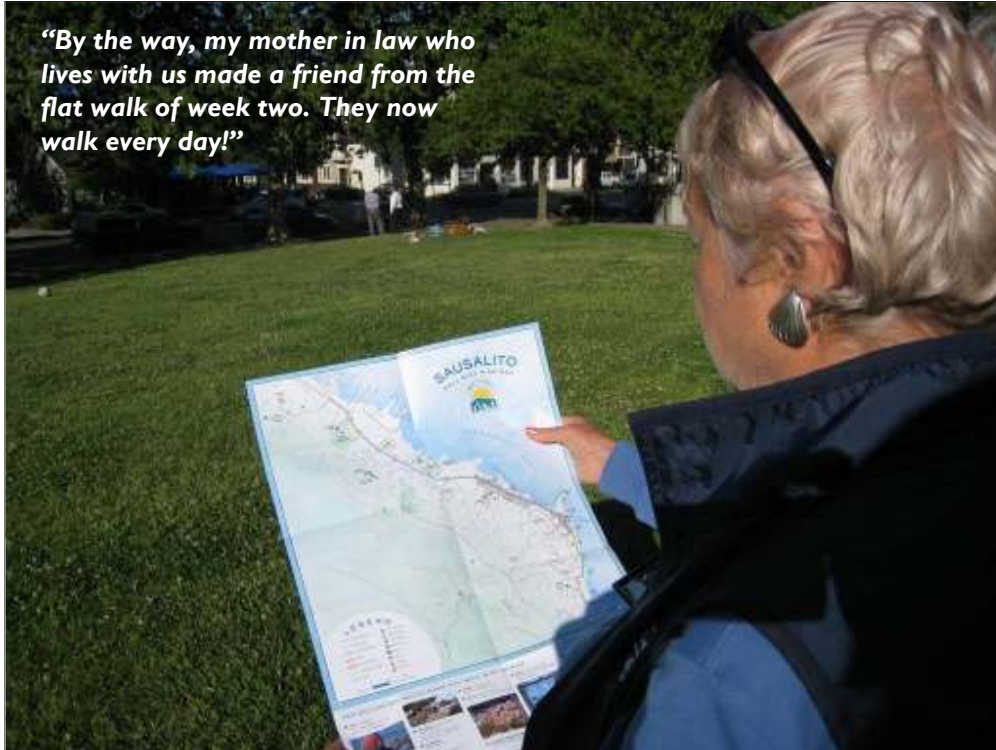
- **Awareness and attitudes**
 - Reported attitude changes
 - Awareness of travel options

- **Participant satisfaction**
 - Program evaluation survey
 - Suggestions for future programs



Let's talk about evaluation: The primary goal of the program is to reduce drive-alone trips, so the most important measurement we make is modeshare, which we measure using a travel diary. We take a baseline survey of a sample of the population, then repeat that after the program closes.

Secondary evaluation measures include participation, changes in awareness of and attitudes toward transportation options, and participant satisfaction and suggestions for improvements in the future.



Our goal is that, after the program, residents feel that when they leave the house, they have many ways to get from here to there, and that they show lasting behavior change. We know that the community aspect of the program provides social support for new behaviors even after the close of the program, as this quote from one participant shows (read quote).

"What a great idea! We're all for leaving the car at home."

"I'm glad to see Sausalito taking the initiative to promote alternatives to car travel! Way to go!"

"Looking forward to the exercise."

"This is a great service to our community."

"This is FANTASTIC! Thank you for this wonderful program."



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<http://www.getaboutcolumbia.com/neighbors>

I hope you have found the SmartTrips approach interesting, and I hope that some of you will choose to run a similar individualized marketing program in the future. Even if you don't go with this exact approach, I hope you integrate some of the successful principles of SmartTrips into your TDM work, such as customized information packets, individualized outreach, and a positive, intensive campaign. This program model is very flexible, though, and currently variations are in development with employers and as part of Safe Routes to School.

Here's my contact information; please feel free to let me know if you have any questions about the information I presented today; I would be happy to talk with you.

Thank you so much.