



Agenda Item No. (8)

To: Finance-Auditing Committee/Committee of the Whole
Meeting of October 24, 2024

From: Jennifer Mennucci, Director of Budget and Electronic Revenue
Joseph M. Wire, Auditor-Controller
Denis J. Mulligan, General Manager

Subject: **STATUS REPORT ON THE 2024 STRATEGIC PLAN**

Recommendation

This is an informational report and requires no action.

Introduction

This report is the first annual review to the Board of Directors (Board) of the status of the 39 initiatives in the 2024 Strategic Plan (Plan). The Board approved the Plan in May of 2024. Strategic Plan activities are also included in the General Manager’s monthly report to the Board.

Background

The Plan is the product of the Board’s Strategic Planning Advisory Committee assigned in January 2023 to undertake an extensive internal and public outreach process, seek input, and then craft the results into a Strategic Plan.

The objective of the Strategic Planning process was to allow the involvement of all stakeholders in the Golden Gate Bridge, Highway and Transportation District’s (District) business sphere: bridge operations and maintenance; and, the provision of bus and ferry service between North Bay and San Francisco. To achieve that goal, District leadership undertook or directed staff to undertake a series of outreach efforts described below:

1. In January of 2023, the Board President created the Strategic Planning Advisory Committee comprised of the chairs of the standing board committees to lead the strategic planning effort.
2. To ensure that the expertise of the entire board was tapped, the Board created four advisory subcommittees of the Board to provide input focused on the areas of bridge and transit service, sustainability, the labor force, and fiscal responsibility.
3. The Board requested and received input from the District’s four established public advisory committees: Bus Passengers, Ferry Passengers, Accessibility and Bicycles and Pedestrians.

4. The District conducted extensive direct outreach to its customers and to the general public through various methods, including public comment at public meetings, to request input for the strategic plan.
5. The District also requested input from agencies in the Bay Area.
6. The District conducted a learning session with North Bay transit operators and public funding agencies.
7. The District solicited input from its employees, and also reviewed the results of suggested initiatives produced by the extensive 2021/2022 internal strategic planning process that involved staff from throughout the District.

The extensive outreach process produced over 400 comments, statements, ideas and requests on topics related to the District's businesses, how they operate, or how they might improve. The Committee met regularly, considered this vast amount of input, and crafted 39 separate initiatives to recommend to the full Board for approval.

In March of 2024, the Strategic Plan Advisory Committee provided a draft of the 2024 Strategic Plan to the Board for consideration, discussion, and comment. At that meeting, the Board asked the public, Board members, and partner agencies to provide comments on the draft of the 2024 Strategic Plan.

The Committee reviewed all comments submitted to the District during the comment period and incorporated changes into the final Strategic Plan. The 2024 Strategic Plan was approved at the May 2024 Board meeting and required that it be reported on annually.

Impact of the Plan

The goal of the Plan is to implement initiatives that will shape the future of the District. The Plan has 39 initiatives and targets a diverse set of objectives as evidenced by the wide-ranging initiatives it contains. This Strategic Plan is broader than the District's previous three strategic financial plans that focused more specifically on long-term deficit reduction. The initiatives within this new Strategic Plan are designed to enable the District to:

- Carry out its mission in the post-pandemic environment to operate, maintain, and strengthen the Golden Gate Bridge to ensure the efficient flow of traffic during commute periods by providing public transit alternatives;
- Meet the needs of its with a reduced level of resources due to that reduction in customer demand brought by the pandemic;
- Achieve the climate sustainability goals of the District, Region, and State;
- Attract, train and maintain a high-quality workforce to ensure that the District can meet its customer-driven mission;
- Participate meaningfully in the region's transportation goals; and,
- Make a significant positive contribution to the quality of life of the people in the District's service area.

The Strategic Plan is designed to focus on achieving the Board’s goals and as such, also serves as a work plan for staff. The Strategic Plan identifies general priorities to guide implementation work on each initiative recognizing that staff resources are limited and not everything can happen at the same time. The workload impact of the Strategic Plan will be addressed each year in the District's budget. Initiatives will begin at the Board's direction, but Staff’s entire workload will be taken into consideration in the timing of when the initiatives in the Strategic Plan are undertaken. The Strategic Plan will seek to keep existing projects that are underway moving forward on schedule to the degree possible.

Annual Review

The approved Strategic Plan is reviewed annually and can be updated annually as part of the Board’s regular financial planning cycle, which currently includes the yearly budget and long-term financial projection. The Strategic Plan is a living document subject to change year-to-year as initiatives are completed, restructured, deferred, or withdrawn, or as new ideas, concepts and initiatives are added.

Attachment B contains the 39 initiatives of the 2024 Strategic Plan. The initiatives are unchanged from when the Plan was approved in May earlier this year. Staff has added a “Status” entry for each of the initiatives to provide basic information on what work is being done.

Future annual status reports on the 2024 Strategic Plan will reflect what initiatives are completed, deferred to a future Strategic Plan, added, or withdrawn.

Consideration of New Initiatives

The Board has an option to add, delete or modify any initiative in the Plan. Staff reviewed the Plan and recommends continuing to work off the current plan based on the newness of the Plan as well as the numerous initiatives that are already underway. If the Board chooses to add an initiative, it does not commit the Board to implementation. Prior to implementation of any specific initiative, further staff analysis will be done and as required by Board policy, each element of the Plan will be brought through the Board’s committee structure and then to the Board for approval prior to implementation.

Fiscal Impact

There is no fiscal impact associated with this status report. Fiscal impacts will occur when specific initiatives are approved for implementation and will be noted in future Board reports that accompany those actions.

Attachment A: Plan Structure and Ordering Criteria
Attachment B: Strategic Plan Status Report

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Attachment A

Plan Structure and Ordering Criteria


The Strategic Plan is made up of 39 initiatives divided into 5 descriptive groupings;

1. Customer Service Improvements
2. Improve Transit Service Through Regional Coordination
3. Sustainability and Climate Responsibility
4. Address Financial Shortfall
5. Operational Excellence

Within each grouping, the initiatives are ordered by three levels of criteria using the categorization key included in Attachment B and the Strategic Plan.

- Timing is the first criterion. Each initiative is grouped by whether the District can work to complete the initiative at the time of its choosing, whether the work is contingent on the cooperation of another organization or agency, or whether the initiative requires significant preparation or other events to occur for it to be undertaken.
- Duration is the second criterion. Each of the three Timing groups is further ordered by whether the initiative is underway, will take less than a year to complete, or will take more than a year to complete.
- Fiscal Impact is the third criterion. Each of the three Duration groupings is further ordered by the level of the initiative's estimated net fiscal impact on the District's long-term finances. The initiatives are ordered in six classifications of net fiscal impact: high, medium and low – both positive and negative. For example, High Positive is estimated to increase revenues or decrease costs by over \$1 million a year, while High Negative is estimated to increase costs or decrease revenues by over \$1 million a year. Medium affects costs and/or revenues between \$100,000 and \$1 million a year. Low affects costs and/or revenues less than \$100,000 a year.

Categorization Criteria for the Final Strategic Plan

Timing	Duration	Fiscal Impact	Categorization Criteria
A			Anytime: project can be undertaken at anytime
C			Contingent: on actions of others outside of the District
F			Future: requires significant preparation or time to pass
			Underway: initiative is underway already
			Short: less than one year to implement
			Long: more than one year to implement
		+\$\$\$	High: Estimated to decrease costs or increase revenues by a net of more than \$1 million a year.
		+\$\$	Medium: Estimated to decrease costs or increase revenues by a net of between \$100,000 and \$1 million a year.
		+\$	Low: Estimated to decrease costs or increase revenues by a net of less than \$100,000 a year.
		-\$	Low Negative Impact: Estimated to increase costs or decrease revenues by a net of less than \$100,000 a year.
		-\$\$	Medium Negative Impact: Estimated to increase costs or decrease revenues by a net of between \$100,000 and \$1 million a year.
		-\$\$\$	High Negative Impact: Estimated to increase costs or decrease revenues by a net of more than \$1 million a year.

(Added 10/23/24)

Attachment B – Strategic Plan Status Report

Initiative		Timing	Duration	Fiscal Impact	Status: Forthcoming – F / Active – A	
1	Enhance accessibility when planning bus stops, routes and facilities including accessible paths of travel.	A	⌚⌚	-\$	F	The District will be collaborating with partner agencies to enhance accessibility as opportunities arise.
2	Study and implement ways to work to reduce District jurisdiction injury crashes yearly, with a goal of reaching zero serious injuries or fatalities.	A	⌚⌚	-\$	A	Current efforts to reduce injuries include the Bus Accident Review Committee, which consists of representatives from Operations, Maintenance, and the Safety & Training Department. Additionally, the District utilizes a Safety Management System (SMS) to analyze safety issues. This system incorporates a Safety Committee that reviews safety notices, proposes improvements, and sets performance standards. The committee includes front-line staff, District management, Union members, and Risk Management personnel.
3	Match Bus and Ferry service levels to changing customer demand post-pandemic to maximize passengers per trip. Tailor service to the varied and unmet customer demand during the workweek and seasonally.	A	⌚⌚⌚	+\$\$\$	A	Starting in August 2024, the commute and reverse commute directions between Novato and San Francisco operate every 30 minutes on weekdays as well as additional commute trips were added to meet changes in customer demand. The District is exploring potential changes to the Larkspur Ferry schedule effective January 2025 to better meet the most desired weekday travel times while also improving operational efficiency. Likewise, staff is evaluating the demand through analyzing bus and ferry ridership trends and conducting customer surveys while also coordinating with regional transit providers to reduce service duplication and improve transfer connections.
4	Improve bicycle access on transit. Examples include new, secure long-term parking for bikes of different sizes, types, and dimensions, more dry storage on board	A	⌚⌚⌚	-\$	A	The District is designing future ferry vessels to include 75 dedicated bike storage spaces of various shapes and sizes as well as storage to support the smaller size personal mobility

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	ferries, and secure bike racks with additional capacity on buses.					<p>devices commonly used to help to extend the first and last mile of a passenger’s journey.</p> <p>All active buses are equipped with safe and secure bicycle racks as well as bicycle storage racks are also available at the San Rafael Transit Center for long-term use. The Bus Division also enhances bicycle access by assigning appropriate bus types to its routes.</p>
5	Prioritize equity as a criterion when planning and implementing transit service, with a focus on providing robust service within equity-priority communities that have significant concentrations of underserved populations.	A	⌚⌚⌚	-\$	A	To prioritize transit service, schedule changes were made in August 2024 improve connections for customers traveling to/from the Canal and Marin City communities. In January 2025, the District plans to add one round-trip to the east bay route serving Richmond and connections to the Canal.
6	Work with partner agencies to integrate the San Rafael Transit Center into the community by providing seamless transit connections with the goal of substantially increasing transit ridership in the county.	C	⌚	-\$	A	The District is collaborating with the City of San Rafael, Marin Transit, SMART, and TAM on the preliminary design and environmental clearance phases of the San Rafael Transit Center Replacement project. The project will relocate the transit center one block to the north, improving access, safety, and convenience for transit users across all modes of travel to the SMART Train station as well as the inclusion of a bicycle facility to connect the North-South Greenway through Marin County. Staff was also involved with Caltrans’ Bay Area Mobility Hub Study, which involved the potential to establish a regional mobility hub kitty-corner from the proposed site of the relocated San Rafael Transit Center.
7	Work with partner agencies to develop and implement an Active Transportation Program that includes supporting where	C	⌚	-\$	A	As part of the Active Transportation Program, the District is working with TAM and SCTA to launch Redwood Bikeshare,

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possible, their First & Last Mile solutions to increase access to District transit.					which will include a station at Larkspur Ferry Terminal starting in 2025.
8 Work with partner agencies to develop a comprehensive, forward looking service plan for the Highway 101 Corridor and evaluate where there is duplicative North Bay service between SMART, GGT, Marin Transit and Sonoma service providers.	C	⌚⌚⌚	+\$\$\$	A	The District has partnered with transit agencies in Marin and Sonoma Counties and is developing the MASCOTS Plan to improve coordination of services throughout the North Bay that will include an evaluation of transit service across the Golden Gate Transit/Ferry system.
9 Support the Regional Network Management goals, such as those embodied in the MASCOT program.	C	⌚⌚⌚	+\$	A	The District is an active participant in the MASCOTS Plan to fulfill MTC’s goal of improving regional efficiency and is also fully participating in Regional Network Management activities.
10 Work with State and regional partners to increase bus speeds, including increasing the effectiveness of the HOV lanes and reducing operating costs on the Highway 101 corridor. Examples include extended carpool hours, converting HOV to 3+ passengers, and/or removing zero-emission vehicles from HOV.	C	⌚⌚⌚	+\$	A	The District is working with regional partners on the BusAID and Transit Priority Policy programs, which are regional efforts to improve bus speeds. The District is also working with MTC, Caltrans, SCTA, TAM, and others to establish more effective HOV lane policies along Highway 101 in Marin and Sonoma Counties.
11 Work with regional partners to improve bus travel times on the westbound approach to the Richmond Bridge during commute hours.	C	⌚⌚⌚	+\$	A	The District is collaborating with MTC, Caltrans, and others to create a westbound HOV lane on I-580 in Richmond to would be used by the east bay transit routes.
12 Increase bus ridership by working with state and regional partners (including cities, counties and private land owners) to increase capacity at, and accessibility to, park and ride lots in the Highway 101 corridor.	C	⌚⌚⌚	+\$	A	The District supports the efforts to improve park-and-ride facilities along the Highway 101 corridor, including (1) expanding Petaluma Blvd South to provide more parking and an improved bus stop, (2) reopening Central San Rafael as a

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					mobility hub with parking availability, and (3) adapting Manzanita to rising sea levels.
13 Work with partner agencies to investigate undertaking a comprehensive marketing strategy (including social media) to attract both more transit riders and those of various types, including organized groups, families, transit-dependent individuals, non-commute users, and convention attendees. Examine marketing additional Ferry and Bus service to special events and non-commute locations and how passengers can make connections to local destinations.	C	⌚⌚⌚	+ \$	A	Projects to increase ridership include: promoting leisure travel, advertising special event ferry service, partnering with SMART and other North Bay agencies to promote transit services in the region, partnering with local major events (such as the Super Bowl and World Cup events) and launching a commuter service campaign to build ridership in Petaluma.
14 Work with regional funding partners and in cooperation with government and commercial entities to expand bus and ferry service beyond the 101 corridor including access to high-traffic special events and recreational sites in the District's service area during and outside of its normal operating hours and additional links to the I-80 corridor.	C	⌚⌚⌚	+ \$	F	As opportunities become available, the District will seek increased funding to establish ferry service to/from Mission Bay in San Francisco and expand bus service to/from the East Bay.
15 Work with the Transportation Authority of Marin on the 101-580 Multi-modal and Local Access Improvement Project to increase traffic flow and bus speeds in the 101 corridor.	C	⌚⌚⌚	- \$	A	The District is working with TAM, Caltrans, and others to support improved transit operations along Highway 101 and at the 101/580 interchange in San Rafael.

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16 Work with funding partners to enhance safety on Alexander Avenue to align more properly with its place in the active transportation network.	C	⌚⌚⌚	-\$	A	The Alexander Avenue Rehabilitation Design project is currently working with the Pedestrian Bike Advisory Committee to improve safety and is in the process of finalizing the project's scope.
17 Plan for climate change by establishing a financially feasible and environmentally sustainable business model for the District including: a long-term energy plan for facilities with implementation timeline goals; green transportation options for Bridge, Bus and Ferry operations; and, a plan to increase efficiency and reduce waste throughout the District's operations that incorporates modern practices, long-term sustainability and environmental and climate responsibility. Work with State and regional transportation partners and customers, staff and the general public to achieve climate goals. Consider dedicating staff permanently to the effort and foster District-wide employee involvement in the District's sustainability goals. Design the plan for achieving financial savings, possibly including earning revenue through clean energy generation. Updates will be provided as available in the General Manager's monthly report.	A	⌚⌚⌚	-\$	A	<p>The District is working across its organization for ways to achieve this initiative. For example, Golden Gate Ferry is currently in the design phase of a fleet replacement program that will feature a more efficient hull design and a propulsion system equipped with the first and only CARB approved diesel particulate filter. Golden Gate Ferry is also actively exploring pilot project opportunities for an alternative fuel high speed vessel in collaboration with industry leaders, SF Bay Ferry, and CARB and will continue to assess the effectiveness of the MV Sea Change hydrogen vessel pilot program, as a sponsor.</p> <p>The San Rafael District office parking lot is also in the process of installing solar panels reducing the District's dependency on the grid. The District is transitioning its bus fleet to zero emissions in line with the CARB Innovative Clean Transit (ICT) Rule. The District is implementing a long-term energy plan for its facilities under the Building Energy Benchmarking Program, which focuses on increasing efficiency, reducing waste, and promoting environmental sustainability across operations.</p>

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18	Study and implement effective alternatives for bus and ferry emissions reductions, as resources allow.	A	⌚⌚⌚	-\$	A	The future ferry vessels are being designed to use the cleanest marine engines available, exceeding the EPA standards. District staff continue to explore and study the technological development of zero emission or near zero emission technologies that become feasible to power the new ferries later. The Bus Division plans to procure its first zero-emission buses by 2025 and transition its bus fleet to zero-emission vehicles to align with CARB’s ICT Rule.
19	Explore opportunities and possible mechanisms to continue to jointly use and share District facilities with other agencies for transit purposes and to support efforts to jointly develop housing at District property consistent with local zoning and planning jurisdictions and within the District’s Mission.	C	⌚⌚⌚	+\$	A	The District shares space at its San Rafael and Novato properties with Marin Transit’s contractor for paratransit operations for Marin Transit and Golden Gate Transit. The District leases space at its San Rafael property to the Marin Airporter for transportation service that removes cars from the Golden Gate Bridge. The District shares its Sausalito Ferry Landing with Blue and Gold Ferry.
20	Explore opportunities to provide transit service at new transit-oriented developments.	C	⌚⌚⌚	-\$	A	As opportunities arise at new transit-oriented developments, the District will explore its service demand for both transit and ferry.
21	Develop and implement a new 5-year toll increase program that helps to address the funding needs of the Bridge and the District's transit operations.	A	⌚⌚	+\$	A	The District approved a new 5-year toll plan in Spring of 2024 and will develop an additional plan beginning in 2028.
22	Analyze adding staff and/or consulting resources to increase the District's ability to	A	⌚⌚	+\$	A	Staff work is underway to analyze what resources will best support the District’s needs for grant funding.

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seek additional grant funding to maintain the District's aging capital infrastructure.					
23 Eliminate toll discounts for private transportation services providing service to SFO.	A	⌚⌚	+\$\$	F	Staff will begin to analyze this and bring to Board in a future year.
24 Determine the financial feasibility of paying down unfunded liabilities with CalPERS.	A	⌚⌚	+\$\$	F	This initiative is under development and will be analyzed to inform the next budget cycle.
25 Develop a comprehensive paid vehicle access and parking program across all District parking lots.	A	⌚⌚⌚	+\$\$	F	This initiative will be started next year (2025).
26 Examine the feasibility of re-directing some of the District's northern bus routes to the District's ferry terminals to provide efficient and cost-effective service to San Francisco.	C	⌚⌚⌚	+\$\$\$	F	Staff is exploring possibilities of re-directing northern bus routes to the ferry terminals based on regional coordination and MASCOTS studies.
27 Study the feasibility of expanding the Bridge experience for visitors with fee-based tours.	F	⌚⌚⌚	+\$\$\$	A	Staff has begun to review the feasibility of possible tour options.
28 Study the feasibility of two-way tolling on the Golden Gate Bridge: collect half the toll amount northbound and half the toll southbound.	F	⌚⌚⌚	+\$\$\$	A	Staff has started implementing the technology to study the traffic trends and will analyze the feasibility of this next year.
29 Develop 5- and 10-year capital plans based on current project delivery abilities.	A	⌚⌚	+\$\$\$	A	Staff is currently working on developing a refined plan to create a dynamic and right-sized Capital Plan which will also inform future budget development.

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30 Study the effectiveness of all staff training, including training on sexual harassment and implicit bias.	A	⌚⌚	-\$	F	District staff will begin to put together a plan to study the effectiveness of staff trainings.
31 Regularly carry out employee surveys and/or focus groups on issues concerning the District to take advantage of their value, knowledge, and experience toward both setting the future direction of the District and improving its current customer service and operational efficiency.	A	⌚⌚	-\$	A	The District recently completed an Employee Engagement Survey and has also held three Employee Resource Group meetings for women (Grow, Participate, Share) aimed at improving workplace communications, building relationships and highlighting growth opportunities.
32 Institute a process to reevaluate business areas and staff levels in all departments; examine both filled and vacant positions.	A	⌚⌚⌚	+\$\$\$	A	The staff is currently working on creating a District-Wide Professional Development Program to bring to the Board, creating ladders of opportunities and retention methods.
33 Explore alternative methods of capital project planning, tracking and delivery to increase the efficiency of completing projects, reduce costs and improve asset management.	A	⌚⌚⌚	+\$\$\$	F	In initiative 29, the Capital Plan will bring more information to assist in the completion of this initiative.
34 Create and implement a comprehensive, District-wide program to attract, train, promote, and retain management and staff needed to accomplish strategic goals.	A	⌚⌚⌚	+\$\$	F	District staff will work on a comprehensive District-wide program for employee success that includes the following current programs: the Bus Operator Apprenticeship Program, Pre-Apprentice Program for Mechanics at Bus, Bridge, & Ferry, Bus Mechanics Apprentice Program, and Ferry

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					Mechanics Apprenticeship Program. There is also an Engineering Professional Development Track.
35 Complete the work of the GGB Board's Advisory Committee on Diversity, Equity and Inclusion and implement its recommendations.	A	⌚⌚⌚	-\$	A	District staff has already implemented the procurement goal to improve the DBE/ACDBE programs by optimizing performance, growing capacity and owner wealth, reducing burdens on firms and recipients, improving operational cohesiveness, strengthening monitoring and oversight requirements, updating certification provisions, and making technical corrections to provide clarification of the rules to recipients, program applicants, and participants. The District will be working to complete the other recommendations in the coming years.
36 Study the feasibility and impact on employees of replacing the annual stipend and HRA program with a cost-effective higher medical stipend to give employees more autonomy with less administrative work.	C	⌚⌚⌚	+\$\$\$	A	The feasibility and impact of this initiative has been completed. It has been discussed and will be brought up in future negotiations with bargaining partners.
37 Study the feasibility and impact on employees of cost-saving health care program changes and standardization such as District-wide standard premium sharing amounts, capping employer premium payments to one HMO plan and one PPO plan, and synchronizing District retiree medical benefit qualifications to allow for consistency across all employees.	C	⌚⌚⌚	+\$	A	The feasibility and impact of this initiative has been completed. Some of these have been discussed previously and will be discussed in future negotiations with the unions representing our employees.

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38	Work with partners to craft standard language within MOUs to improve administrative efficiencies.	C	⌚⌚⌚	+\$	F	The staff will develop this initiative for future negotiation with the unions representing our employees.
39	In cooperation with the bus operator union, take the necessary steps to ensure a stable defined benefit pension for all bus operators.	C	⌚⌚⌚	-\$	A	A working Group established by the bargaining parties is meeting with an Actuary to develop a Rehabilitation Plan.