

The logo for Plan Bay Area 2040, featuring the text "Plan Bay Area 2040" in white, stacked vertically, on a solid blue square background.

Plan Bay Area 2040
Public Outreach and Participation Evaluation
January 2018

Prepared by



for



METROPOLITAN
TRANSPORTATION
COMMISSION

This document was prepared by Civil Edge Consulting and reviewed by staff from the Metropolitan Transportation Commission.

Metropolitan Transportation Commission, Project Staff

Randy Rentschler Director, Legislation and Public Affairs

Ellen Griffin, Assistant Director, Public Engagement

Catalina Alvarado, Terry Lee, Julie Teglovic, Ursula Vogler, Khristina Wenzinger, Leah Zippert --
Outreach Team

Civic Edge Consulting

Paisley Strellis, Senior Project Manager

Kate Fratar, Account Manager

Annie Dulka, Senior Project Manager

Amber Shipley, Partner

Table of Contents

- Introduction.....4
- About Plan Bay Area 2040 5
 - Public Outreach and Participation Program..... 6
 - Shifts in Public Participation..... 6
 - Target Audiences and Stakeholders..... 7
 - Public Participation Goals for Plan Bay Area 2040..... 8
- Summary of Outreach Approach and Activities 9
 - Engagement of Key Stakeholders 9
 - Overview of Public Involvement Activities 11
 - Highlights from Public Involvement Activities 13
 - Timeline of Public Involvement Activities..... 14
 - Goal 1: Promote a Transparent Process..... 15
 - Goal 2: Encourage Broad Participation..... 19
 - Goal 3: Engage for Impact..... 24
 - Goal 4: Build Knowledge..... 25
- Recommendations..... 28
 - Presentation of Materials 28
 - Open Houses..... 28
 - Making Elected Officials Ambassadors of the Plan 28
 - Promotion of Engagement Opportunities 29
 - Clarifying the Role of MTC and ABAG in Regional Planning 29
- Appendices..... 30
 - Appendix 1: Plan Bay Area 2040 Public Meetings 2014-2017..... 30
 - Appendix 2: Participants in Plan Bay Area 2040 Outreach Evaluation Interviews..... 33

Introduction

This evaluation report outlines the many public outreach and participation efforts undertaken in support of Plan Bay Area 2040 between 2014 and 2017. It also aims to evaluate the successes and challenges associated with those efforts to inform engagement associated with the next iteration of Plan Bay Area, slated to kick off later in 2018 and continue until adoption in 2021.

The review and evaluation of the public engagement effort undertaken for Plan Bay Area 2040 also can inform and improve public engagement for other projects and programs conducted by MTC and ABAG.

About Plan Bay Area 2040

Plan Bay Area 2040 is the nine-county San Francisco Bay Area's state-mandated, integrated long-range transportation and land use plan. As required by Senate Bill 375, all metropolitan regions in California must complete a sustainable communities strategy (SCS) as part of a regional transportation plan (RTP). In the Bay Area, the Metropolitan Transportation Commission (MTC) and the Association of Bay Area Governments (ABAG) are jointly responsible for developing and adopting a SCS that integrates transportation, land use and housing to meet greenhouse gas reduction targets set forth by the California Air Resources Board (CARB).

The region first adopted Plan Bay Area in July 2013, charting a course to reduce per-capita greenhouse gas emissions through the promotion of more compact, mixed-used residential and commercial neighborhoods near transit. Plan Bay Area supported Priority Development Areas (PDAs) selected and approved by city and county governments with planning grants, technical assistance, and prioritization for regional and state transportation and affordable housing funds.

In 2014, MTC and ABAG introduced an approach and timeline for Plan Bay Area 2040, a limited and focused update that builds on the growth pattern and strategies developed in the original Plan Bay Area but with updated planning assumptions that incorporate key economic, demographic and financial trends from the last four years.

On July 26, 2017, ABAG and MTC adopted Plan Bay Area 2040 and its associated Environmental Impact Report (EIR) and supplemental reports. The nearly unanimous vote — with 41 of the 43 officials from the two bodies voting in the affirmative on the Plan and 39 for the EIR — capped a three-year process of plan development and intensive public outreach.

Plan Bay Area 2040 provides a roadmap for accommodating projected household and employment growth in the nine-county Bay Area by 2040 as well as a transportation investment strategy for the region. It details how the Bay Area can make progress toward the region's long-range transportation and land use goals. This includes:

- Describing where and how the region can accommodate 820,000 new projected households and 1.3 million new jobs between now and 2040;
- Detailing a regional transportation investment strategy given \$303 billion in expected revenues from federal, state, regional and local sources over the 24 years; and
- Complying with Senate Bill 375, the state's sustainable communities strategy law, which integrates land use and transportation planning and mandates both a reduction in greenhouse gas emissions from passenger vehicles and the provision of adequate housing for the region's projected population growth.

Plan Bay Area 2040 encompasses the entire Bay Area, including all nine counties and the 101 cities and towns that make up the region. The plan is constrained by the amount of expected transportation revenues and expected household and employment growth. Plan Bay Area 2040 neither funds specific transportation projects nor changes local land use policies. Importantly,

individual jurisdictions retain all local land use authority. Instead, Plan Bay Area 2040 does set a roadmap for future transportation investments and identifies what it would take to accommodate future growth.

Public Outreach and Participation Program

Developing a multibillion dollar plan for the region is no simple task. It is a multiyear process involving four regional agencies; nine counties; 101 towns and cities; state, regional and local elected officials; transit operators; planners; community-based organizations; business organizations; non-profits and the general public.

Despite the complexity inherent to the project, effective public participation depends upon the ability to provide Bay Area residents clear information about the process and meaningful opportunities to weigh in.

ABAG and MTC developed a robust public outreach and participation plan to accomplish this type of meaningful engagement with Bay Area residents. Thousands of people participated in public open houses and other public meetings, telephone and internet surveys, and more. The region's 101 cities and nine counties also participated in the development of the Plan, as did fellow regional agencies like the Bay Conservation and Development Commission and the Bay Area Air Quality Management District. Community-based organizations and advocacy groups representing the diverse interests of the Bay Area were active participants throughout the process, as were some three dozen regional transportation partners. Officials representing Native American Tribes were also consulted.

For a thorough accounting of all the public participation activities in place for Plan Bay Area 2040, please refer to the [Public Engagement Report](http://2040.planbayarea.org/reports) also found at this link: <http://2040.planbayarea.org/reports>.

Shifts in Public Participation

In July 2014, MTC and ABAG introduced a general approach for the 2017 update to the region's long-range transportation plan, known as Plan Bay Area 2040. For this planning cycle, the proposed approach was to conduct a limited and focused update of Plan Bay Area, building off the core framework established by the Plan adopted in 2013.

One key difference between the 2013 Plan and Plan Bay Area 2040 is that the latter did not require adoption of a Regional Housing Needs Allocation (RHNA), which was required in 2013, and which will be included again in the 2021 update. The RHNA process necessitates a great deal of outreach and planning work that was not needed for Plan Bay Area 2040, adopted in 2017.

The proposed approach and tasks for the 2017 update were discussed at a number of meetings and the feedback received helped inform the content and structure of the Public Participation Plan, which was released for public comment in November 2014.

A number of changes in the approach to public engagement were made in response to an evaluation of the first Plan Bay Area adopted in 2013. For the update, public meetings in the nine counties took the form of Open Houses, allowing Bay Area residents and stakeholders to drop-in for information and have one-on-one conversations with planners. Further, information was streamlined and written to make it more accessible to laypeople who were interested in learning about the regional planning process.

With this update, key staff of the community-based organizations working with MTC in low-income communities and communities of color were invited to report in person their findings. By reporting what they heard from their constituents directly to the July 2016 joint MTC Planning Committee and ABAG Administrative Committee, the comments had a stronger impact instead of having the comments filtered through staff. At the July 2016 meeting youth from one of the organizations made a special presentation to policy makers from both agencies.

In response to the previous evaluation that suggested we consider more online technology tools, MTC and ABAG utilized a more robust online "game" during review of the scenario alternatives that helped illustrate trade-offs of various policies. Additionally, the Draft Plan was available online with an interactive comment feature that made it simpler for people reading the Draft Plan online to comment online.

Target Audiences and Stakeholders

In developing updates to the region's long-range plan, ABAG and MTC strive to promote an open, transparent process that encourages the ongoing and active participation of local governments and a broad range of interest groups and individuals from the general public. Audiences and stakeholders for Plan Bay Area 2040 included but were not limited to:

- All Bay Area residents
- Affected public agencies (cities and counties, transit agencies, county congestion management agencies, special districts, county health offices, resource agencies, etc.)
- Transportation and environmental advocates
- Neighborhood and community groups
- Business and labor organizations
- Affordable housing advocates, home builder representatives, homeowner associations and those effected by the Bay Area's current housing crisis and/or displacement
- Landowners, commercial property interests
- Low-income communities, communities of color and limited English proficient communities
- Other interested opinion leaders, advocacy groups

In addition to the local governments engaged around Plan Bay Area 2040, MTC and ABAG consulted with officials responsible for other types of planning activities that are affected by transportation, such as federal and state conservation and historic preservation agencies.

The region's Native American governments were also consulted. There are six federally recognized Native American tribes in the San Francisco Bay Area. Tribes were invited to participate in government-to-government consultation, which took place early in the process for developing a regional transportation plan and a "Tribal summit" for all six Tribal governments after the draft Plan was released.

MTC and ABAG further engaged media outlets to assist in spreading the word about the plan to the aforementioned groups.

Public Participation Goals for Plan Bay Area 2040

Public participation goals and activities for Plan Bay Area 2040 exceeded the statutorily required input and aimed to strongly engage the target audiences named above. To accomplish this level of public participation, MTC and ABAG committed to the following performance benchmarks to measure the effectiveness of the Public Participation Program:

- **Promote a transparent process:** MTC and ABAG should make every effort to make the often-complex planning process transparent so that the public has early and continuing opportunities to help shape policies and inform decisions.
- **Encourage broad participation:** The process should include the greatest number of people possible from throughout the region and reflect the diverse Bay Area population, regardless of individuals' language, personal mobility or ability to attend a meeting, subject to available budget and resources.
- **Engage for impact:** The feedback received through public participation should be analyzed and provided to policy makers in a timely manner to inform their decisions. Interested participants should be informed of actions by MTC and ABAG at key milestones throughout the planning process.
- **Build knowledge:** This program is an opportunity for MTC and ABAG to inform a wide range of people about transportation and land use issues in the Bay Area. Each step of the process should include an educational element to set context and promote increased understanding of the plan and relevant topics.

Summary of Outreach Approach and Activities

The following section outlines the many public engagement and participation efforts made as part of Plan Bay Area 2040. For a thorough accounting of all the public participation activities in place for Plan Bay Area 2040, please refer to the [Public Engagement Report](http://2040.planbayarea.org/reports) also found at this link: <http://2040.planbayarea.org/reports>.

Engagement of Key Stakeholders

In developing PBA 2040, ABAG and MTC sought to promote an open, transparent process that encourages ongoing and active participation of local governments and a broad range of interest groups and individuals from the general public.

Government Engagement

A partnership with local governments – from elected officials to city managers, planning and public works directors, transit operators, and congestion management agencies – continues to be critical as updates are made to Plan Bay Area. Local officials provide valuable context and specifics about the priorities of their communities and help explain how the regional can support these goals.

One avenue for discussion with local government was through the Regional Advisory Working Group (RAWG). RAWG meetings are open to the public and attendance included local government staff as well as staff from county congestion management agencies, transit agencies, county health departments and a range of interest groups (housing, environmental justice, business, public health, etc.). The primary purpose of this ad hoc group was to enable MTC and ABAG staff to provide information to and receive input from a range of interests at one table, including local and county-level staff. The group met a total of 21 times to discuss technical milestones. More information about the advisory structure is provided in the Key Findings section of this report.

In addition to regular RAWG meetings, ABAG and MTC worked with members of their policy boards to coordinate meetings in each county with elected officials and local government staff. County congestion management agencies provided further meeting structure to discuss issues related to Plan Bay Area.

Advisory committees for Plan Bay Area 2040 included:

- **Regional Advisory Working Group (RAWG):** an ad hoc regional working group formed to advise regional agency staff on Plan Bay Area; RAWG was a mix of planning staff representatives of local government, county-level congestion management agencies (CMAs), transit agencies, state and regional agencies, and a wide range of stakeholder representatives. including affordable housing, businesses, developers, equity, public health and environmental groups. All RAWG meetings were open to the public, and anyone attending had the opportunity to directly participate and comment on the discussion and was encouraged to do so.

- **ABAG Regional Planning Committee (RPC):** composed of a minimum of 18 elected officials and at least 10 citizens from a range of interest areas, hears Bay Area planning issues of regional concern and makes recommendations to the ABAG Executive Board
- **MTC Policy Advisory Council:** a 27-seat advisory panel established to advise MTC on transportation policies in the Bay Area, incorporating diverse perspectives relating to the environment, the economy as well as communities of color, social equity, seniors and people with disabilities.
- **The Bay Area Partnership:** a group of top executives from the Bay Area transit operators, county Congestion Management Agencies and public works departments, as well as regional, state and federal transportation, environmental and land use agencies, that advises MTC; the Partnership's Technical Advisory Committee also met to discuss Plan Bay Area 2040 technical issues.

Community Stakeholder Engagement

MTC contracted with five community-based organizations (CBOs) in 2015 after a competitive procurement process, to seek help from nonprofits in low-income communities and communities of color. The CBO groups participated in an initial round of public open houses and then offered MTC and ABAG advice on best practices for engaging their communities in subsequent phases of developing Plan Bay Area 2040. In 2016, they administered an online survey about future planning scenarios in one of three languages: English, Spanish and Chinese. At a special Listening Session on the draft scenarios in July 2016, the groups also made a presentation to a joint meeting of MTC's Planning and ABAG's Administrative Committee, discussing some of what they had heard from their communities about housing and transportation issues.

One group, the Rose Foundation — with youth from the New Voices Are Rising Program — presented what they learned in terms of effective communication techniques and engagement in the Plan Bay Area 2040 process to youth from around the region. The presentation was part of a Youth for the Environment and Sustainability, or YES! Conference, sponsored by MTC and the Bay Area Air Quality Management District.

In May 2017, MTC hosted a total of five focus groups with constituents of each of the contracted CBO groups to collect feedback on the Plan, including detailed feedback on the Action Plan.

Joint Stakeholder Participation via Policy & Advisory Committees

Meeting times and locations for regularly scheduled meetings of ABAG's and MTC's policy and advisory committees were posted to the Plan Bay Area 2040 website (PlanBayArea.org), along with meeting materials.

Stakeholder participation included collaboration and input from:

- ABAG Executive Board
- ABAG General Assembly
- Metropolitan Transportation Commission
- Joint ABAG Administrative/MTC Planning Committee meetings

Additionally, several advisory committees supported this update to Plan Bay Area:

- Regional Advisory Working Group (RAWG)
- Bay Area Regional Collaborative
- MTC Policy Advisory Council
- ABAG Regional Planning Committee
- Bay Area Partnership Board and its Partnership Technical Advisory Committee
- Performance Working Group
- Regional Equity Working Group

Overview of Public Involvement Activities

The following section outlines the goals laid out in the Plan Bay Area 2040 Public Participation Plan for each outreach technique to be used in engaging Bay Area residents as well as the way that MTC and ABAG met or surpassed each goal.

Public outreach and engagement was broken into four phases:

Phase One: Public Participation Plan (2014-15): MTC held an evening public meeting on October 8, 2014, to hear comments and suggestions for improving public engagement. ABAG staff held discussions at their Executive Committee and Regional Planning Committee, as well as at county delegate meetings. Likewise, staff sought ideas from MTC's Policy Advisory Council, the Regional Advisory Working Group, and congestion management agency planning directors. Staff also launched an online survey and comment forum, and surveyed the public at numerous community events around the region.

In response to comments, the Draft Public Participation Plan spotlights the process and significance of various milestones in development of Plan Bay Area 2040, the roles of various agencies, and opportunities for public comment.

MTC released its Draft Public Participation Plan for public comment on November 7, 2014. Revisions to the Draft provided requested clarification or expanded upon public participation opportunities. The final Public Participation Plan was adopted by the Commission as MTC Resolution No. 4174, on February 13, 2015, with the following goals based on public feedback:

- **Be Specific** — A number of comments asked for more detail in the PPP, including showing more explicitly how public comments are factored into the decision-making process. The 2017 PPP includes strategies directing staff to summarize comments to highlight areas of consensus and areas of disagreement so that Commissioners and the public have a clear understanding of the depth and breadth of opinion on a given issue. The 2017 PPP also calls for meeting minutes that reflect public comments and for staff documentation of how comments are considered in MTC's decisions, as well as information about how public meetings and participation are helping to shape or have

contributed to MTC's key decisions and actions. The 2017 PPP also calls for explaining the rationale when outcomes don't correspond to the views expressed.

- **Localize the Plan Bay Area Message** — One theme expressed the need to communicate the plan and related issues via a local framework to explain why Plan Bay Area matters in a given community and/or county.
- **Involve Under-Served Communities** — Many noted the importance of taking the time to work with low-income communities and communities of color over the long term to build capacity and allow for more effective participation. The Final Draft PPP calls for continued partnerships with community-based organizations to involve residents in communities that might not otherwise participate. Likewise, based on several comments, the 2017 PPP includes revised language to form a Regional Equity Working Group similar to a panel used during the last process.
- **More Access to Meetings** — A number of commenters asked for better access to meetings, whether in-person or via live and interactive web streaming. Several suggested holding meetings at locations that are convenient and accessible, including by public transit. While the 2017 PPP does not go into great detail on meeting formats or locations, it does call for holding meetings at varied times and locations that are convenient to more residents. It also calls for use of interactive web features.
- **Evaluate and Improve** — Another theme called for evaluation of the previous Plan Bay Area process and reviews of each phase of the upcoming Plan Bay Area public engagement process to identify what is likely to work and what needs to be improved. MTC and ABAG did review each phase of the last Plan Bay Area public process and completed a comprehensive evaluation after the Plan was approved. Those reviews helped shape the 2017 PPP, and we anticipate continuing this practice moving forward.
- **Specific Plan Bay Area Topics** — Many of the comments touched on specific issues to be addressed during the Plan Bay Area update that did not directly relate to public participation. When possible, we explained opportunities in the upcoming Plan Bay Area update to address these concerns.

Phase Two: Goals and Targets (2015): Following the adoption of the Public Participation plan, this phase of outreach included decisions on policies related to goals and performance targets, as well as development of regional forecasts of demographic, transportation and economic trends in order to inform and guide Plan Bay Area 2040 investments and policy decisions. This phase also included identification and assessment of potential transportation projects as well as the analysis of operating and maintenance needs of the region's transportation network.

Phase Three: Scenario Planning (2016): With the goals and targets clearly identified, MTC and ABAG moved forward to formulate possible scenarios — combinations of land use patterns and

transportation investments — that could be evaluated together to see if (and by how much) they achieve (or fall short of) the performance targets.

In September 2016, staff released for public review and comment the Draft Preferred Scenario for Plan Bay Area 2040, integrating both a future growth pattern for jobs and housing and a transportation investment strategy to complement that growth pattern. The Draft Preferred Scenario built on the work of identifying targets, analyzing projects, comparing scenarios and working with stakeholders.

Phase Four: Draft Plan Bay Area 2040 (2017): MTC and ABAG released Draft Plan Bay Area 2040 (Draft Plan) on March 31, 2017, followed by the Draft Environmental Impact Report (DEIR) on April 17, 2017. The 2040.planbayarea.org microsite, which hosted the Draft Plan and continues to host the Final Plan, was designed and developed with the goal of making the Draft and Final Plans as accessible to the public as possible. The microsite hosted the Plan itself, key reports, videos, and resources for the public, as well as provided opportunity for public comment throughout. The formal public comment period for both documents closed on June 1, 2017. The public comment period on the Draft Plan capped off more than three years of dialogue and consultation on this planning effort.

Highlights from Public Involvement Activities

Following are highlights of activities from Plan Bay Area 2040 public engagement efforts over the past two-and-a-half years:

- Twenty-seven open houses in the nine Bay Area counties that drew nearly 1,500 participants over the three rounds of open houses (three open houses per county)
- One statistically valid telephone poll in the spring of 2016 with participation from more than 2,000 Bay Area residents from all nine counties, conducted in English, Spanish and Chinese
- Six public hearings to gather input on the plan's environmental impact report (EIR)
- A regional housing summit attended by some 300 Bay Area public officials, community leaders and interested residents to consider ideas and best practices for alleviating the region's housing affordability crisis
- Ongoing meetings with local elected officials, local planning directors and officials from congestion management and transit agencies as well as staff from environmental protection agencies, including 10 presentations to elected officials on the Draft Plan (one in every county)
- One forum, "Calling the Bay Area Home: Tackling the Housing Affordability and Displacement Challenge," with more than 300+ Bay Area residents, social justice advocates, developers, local elected officials, and regional transportation and land use planning agencies, featuring compelling personal accounts from Bay Area residents at risk of losing their homes due to sky-high rents and lack of affordable housing options

- In response to requests from elected officials in Marin County, the Open Houses held there did include a presentation by MTC and ABAG staff and a forum for public comments

Timeline of Public Involvement Activities

Developing a multibillion-dollar, long-range plan for the nine-county San Francisco Bay region is not a simple task. The update took place over two-and-a-half-years and involved four regional agencies, nine counties, 101 towns and cities, elected officials, planners, stakeholder organizations, the public and other interested residents. The many moving parts include goal setting, statutory and voluntary targets, land use forecasting, financial projections, project evaluation, scenario analysis and more.

Public participation is critical to ensure an open process, in which all interested residents have the opportunity to offer input and share their visions for what the Bay Area will look like decades from now. Between October 2014 and May 2017, MTC and ABAG engaged nearly 5,000 Bay Area residents, elected officials, stakeholders, and community leaders through some 45 public involvement activities including public meetings, open houses, online and telephone engagement, and focus groups. A complete list of public meetings is included in the Appendix.

Key Findings: Targeted Performance Measures and Outcomes by Goal

In addition to setting goals for reducing greenhouse gases and housing our growing population, California Senate Bill 375 calls for a separate Public Participation Plan (PPP) for development of the regional transportation plan and Sustainable Communities Strategy. MTC's PPP is not a static document, but an on-going strategy that is reviewed and updated based on the changing circumstances of the Commission and the transportation community it serves and an evaluation of previous outreach efforts.

As part of the public outreach and involvement program developed for the regional transportation plan, MTC set performance targets to measure the effectiveness of the participation program. The guiding belief is that people who take the time and energy to participate should feel it was worth their while to join in the discussion and debate.

Together MTC and ABAG, committed to achieving four goals to maximize the effectiveness of the public participation program related to Plan Bay Area 2040:

1. Promote a transparent process
2. Encourage broad participation
3. Engage for impact
4. Build knowledge

The following section elaborates upon these goals and their individual performance benchmarks which are used to measure the success of the public participation effort.

MTC and ABAG not only met, but surpassed the majority of the goals and benchmarks laid out by the PPP while conducting public outreach related to Plan Bay Area 2040.

Goal 1: Promote a Transparent Process

The PPP for Plan Bay Area 2040 asserted that MTC and ABAG should make every effort to make the often-complex planning process transparent so that the public has early and continuing opportunities to help shape policies and inform decisions. This mandate includes two specific goals performance targets, the first of which is specified below.

Transparent Process: Performance Target 1

For each major technical planning milestone, develop user-friendly web content and/or handouts written in plain language explaining:

- *The purpose of the work*
- *The significance or impact on other plan elements*
- *Opportunities for public input*
- *Decision-making roles*

➤ **Action: planbayarea.org Website and 2040.planbayarea.org Microsite**

Planbayarea.org played a significant role in the outreach related to Plan Bay Area 2040. The 2013 Outreach Evaluation Report included a recommendation to “provide a dedicated web site in order to make it easier for the public and partner public agencies to access needed information specific to Plan Bay Area (versus hosting it on a web site covering a range of planning topics).” PlanBayArea.org was created in response to that recommendation and provided a single, comprehensive site to gather information about Plan Bay Area 2040.

Not only was planbayarea.org updated regularly to provide the very latest information, it was designed to be responsive (aka mobile-screen friendly) prior to the release of the Draft Plan in 2017. The 2040.planbayarea.org microsite, which hosted the Draft Plan and continues to host the Final Plan, was designed and developed with the goal of making the Draft and Final Plans as accessible to the public as possible. The microsite hosted the Plan itself, key reports, videos, and resources for the public, as well as provided opportunity for public comment throughout. By being viewable on mobile screens, the Draft Plan was more accessible to people without home or work computers and who largely depend on their phone for access to the internet.

➤ **Action: Display Boards Available Online**

Display boards, which were used in public meetings as stand-alone informational pieces to explain the purpose of the work and its significance related to other plan elements in plain language. The boards are an example of the content that was shared on planbayarea.org with the aim of making complex planning issues accessible to laypeople and providing a meaningful opportunity for engagement, even if residents were unable to attend.

In addition to display boards, planbayarea.org contained online technology tools, such as interactive maps, visualizations, as well as a website dedicated exclusively to the Plan.

➤ **Action: Advisory Bodies**

Throughout the development of Plan Bay Area 2040, ABAG and MTC regularly consulted with a number of advisory groups to hear from a range of perspectives and get early input. Key advisory bodies included the Regional Advisory Working Group, MTC's Policy Advisory Council, ABAG's Regional Planning Committee and the Bay Area Partnership Board.

Regional Advisory Working Group

In 2014, the Regional Advisory Working Group (RAWG) — an ad hoc regional working group formed in 2010 to advise regional agency staff on the first Plan Bay Area — was called together to meet again to offer insights and comments on Plan Bay Area 2040. The RAWG was a mix of planning staff representatives of local government, county-level congestion management agencies (CMAs), transit agencies, state and regional agencies, and a wide range of stakeholder representatives. Specifically, each county was asked to nominate at least one planning director to attend and participate for the duration of the process. In addition, representatives of various stakeholder groups – including affordable housing, businesses, developers, equity, public health and environmental groups – also participated. All RAWG meetings were open to the public, and anyone attending had the opportunity to directly participate and comment on the discussion and was encouraged to do so.

Beginning in September 2014 through July 2017, the RAWG met a total of 21 times. The working group reviewed and commented on:

- MTC's Public Participation Plan
- Plan Bay Area 2040 process and schedule
- Forecasting methodology
- Goals and targets
- Needs assessment and call for transportation projects
- Methodology for evaluating performance of transportation projects
- Financial assumptions for transportation projects
- Goods Movement, Regional Prosperity and Transit Core Capacity plans
- Housing affordability and displacement of long-time residents
- Alternative long-range planning scenarios
- Preferred housing and transportation investment scenario
- Regional framework for ensuring equity for low-income communities and communities of color
- ABAG's regional housing action agenda
- Compelling case review for low-performing transportation projects
- Employment growth assumptions
- Setting transportation and land use performance targets and indicators
- Priority Development Area assessment

- Vision scenario planning approach
- The Draft Plan and its Action Plan and proposed revisions after public input

MTC Policy Advisory Council

The mission of MTC's 27-member Policy Advisory Council is to advise MTC on transportation policies in the San Francisco Bay Area, incorporating diverse perspectives relating to the environment, the economy and social equity. One of the key topics for the Council has been the development of Plan Bay Area. Through July 2017, the group discussed Plan Bay Area 2040 at 23 of their public meetings.

ABAG Regional Planning Committee

The Regional Planning Committee (RPC) is a standing committee of ABAG that hears Bay Area planning issues of regional concern and makes recommendations to the ABAG Executive Board, including development of Plan Bay Area. The Regional Planning Committee is comprised of 36 members, including: a minimum of 18 elected officials from the nine Bay Area Counties; representatives of the four regional agencies; and stakeholders representing business, minorities, economic development, recreation/open space, environment, public interest, housing, special districts, and labor. From June 2014 through July 2017, the RPC met 10 times to advise on a range of Plan Bay Area 2040 matters.

The Partnership Board

This group of top executives from Bay Area transit operators, county congestion management agencies and public works departments, as well as regional, state and federal transportation, environmental, resource-protection and land use agencies, advises MTC periodically on key planning issues, including Plan Bay Area 2040. The Partnership Board met six times on Plan Bay Area 2040 leading up to the release of the Draft Plan in 2017.

The Partnership Technical Advisory Committee

The Partnership Technical Advisory Committee, or PTAC, consists of staff from partnership agencies described above, with whom MTC consults on transportation planning and policy matters. PTAC considered issues related to Plan Bay Area 2040 at three meetings in 2015, six meetings in 2016 and once in 2017. PTAC members also participated in meetings of the Regional Advisory Working Group.

These advisory group meetings, in conjunction with public meetings of MTC and ABAG policy boards and workshops held around the region, provided nearly 200 different opportunities between 2014 and 2017 for Bay Area residents to help shape Plan Bay Area 2040. The clear structure and transparent proceedings of these advisory bodies provided an opportunity for laypeople to see the conversations that helped to inform the decision-making process.

Transparent Process: Performance Target 2

Produce user-friendly videos, interactive data visuals, maps and other graphic elements to help tell the story.

➤ **Action: Web Videos**

MTC and ABAG took advantage of the ability to share videos online and hosted nine separate videos, made between 2014 and 2017 to help educate Bay Area residents about the development and contents of Plan Bay Area 2040. The videos, which can be viewed online at planbayarea.org/news/videos, include:

- Personal stories from Bay Area residents challenged by the housing crisis facing the region at a February 2015 forum;
- A recap of the first round of Open Houses, held in 2015;
- The frank discussion of the challenges of finding housing in the Bay Area, from the Special Housing Forum of February 2016;
- An explanation of the Plan Bay Area 2040 Scenarios, kicking off that phase of outreach in March 2016;
- A recap of the second round of Open Houses, held in 2016, and the feedback gathered on the various Plan Bay Area 2040 Scenarios; and
- Finally, a plain-language explanation of the Draft Plan Bay Area 2040 and how it was shaped by public engagement.

➤ **Action: Build a Better Bay Area Online Tool**

A custom-made online quiz, known as Build a Better Bay Area, provided an opportunity for Bay Area residents to weigh in on the three alternative scenarios presented as part of the Plan Bay Area 2040 planning process between May and September 2016. More than 900 residents participated and over 204 responses were the result of outreach by Community Based Organizations who partnered with MTC and ABAG in promoting participation in the Plan Bay Area 2040 planning process.

The Build a Better Bay Area quiz was available for participants to take at Open Houses and was widely publicized on social media, allowing hundreds of Bay Area residents to participate without having to attend a single meeting.

➤ **Action: Regional and Local Maps**

Large format regional and local maps were prominently displayed at public meetings relating to Plan Bay Area 2040. These large format maps, which were (and are still) available for view on PlanBayArea.org helped give Bay Area residents a sense of how Plan Bay Area 2040 could impact the region and a nuanced vision of the potential impacts to their county, city, or town in particular.

➤ **Action: Photo Booth and Activity Stations**

Residents were given an opportunity for hands-on engagement by participating in Photo Booth activity stations at the 2016 and 2017 Open Houses. In 2016 Open House attendees were asked

to participate in the “Places of the Bay Area” initiative asking residents to share stories about the various places in our lives from a multiplicity of perspectives. Place stories provided an everyday take on residents’ experiences with places of the Bay Area—focused on personal connections to the place they call home. In 2017 attendees were asked to pose in our photo booth with a sign holding up a message about their hope for the future of the region as it relates to housing, jobs, and resiliency. Photos were then shared via social media to spread the word about Plan Bay Area 2040.

Goal 2: Encourage Broad Participation

The second stated goal for the Plan Bay Area 2040 public participation process stressed that the greatest number of people possible from throughout the region be included and reflect the diverse Bay Area population, regardless of individuals’ language, personal mobility or ability to attend a meeting, subject to available budget and resources.

This mandate includes seven specific performance targets specified throughout this section of the report. The first specific performance target is as follows:

Broad Participation: Performance Target 1

The demographics of targeted groups (age, ethnicity, income, primary language, geographic location, disability) roughly mirror the demographics of the Bay Area’s population.

➤ **Action: Encouraging Participation by Members of Underserved Communities**

Equity is one of the three overarching themes in Plan Bay Area 2040. The three themes are equity, environment, and economy, or the “three Es” of sustainability. As detailed earlier in this report, Plan Bay Area 2040 public outreach and participation aimed to maximize equity through engagement of traditionally underserved communities, such as low-income communities and communities of color throughout the Bay Area.

Tracking participation by underserved community members has been challenging. Participants in public meetings were offered evaluation forms which provided an opportunity to self-report on ethnicity. However, the majority of participants who completed the evaluation forms declined to provide demographic data. Thus, there is not statistically significant data to confirm the rate of participation of targeted groups (age, ethnicity, income, primary language, geographic location, disability) mirrors the demographics of the Bay Area’s population in the planning process of Plan Bay Area 2040.

➤ **Action: Offering In-Language Meetings and Interpretation**

Community meetings with Spanish and Chinese interpretation were offered through MTC’s work with community organizations. Meetings hosted by the community organization in 2017 included translators, as recommended by the community group to reduce barriers to participation. See the next item below for mention of simultaneous Spanish and Chinese language interpretation at these meetings. A one-day housing forum held in February 2016 by

MTC and ABAG, in conjunction with Plan Bay Area 2040, to discuss the housing crisis in the Bay Area included translators as requested by attendees.

➤ **Action: Partnering with Community Based Organizations**

Involving traditionally under-served communities, specifically low-income communities and communities of color, was a priority identified through public feedback to the 2015 Public Participation Plan (PPP). Additionally, the PPP tasked MTC and ABAG with developing long-term communication channels with underserved communities to build capacity and allow for more effective participation in future long-range planning processes.

As mentioned previously, MTC contracted with five community-based organizations (CBOs) in 2015 after a competitive procurement process, to seek help from nonprofits in low-income communities and communities of color. The partner CBOs participated in an initial round of public Open Houses in 2015. Following these initial Open Houses, they offered MTC and ABAG advice on best-practices for engaging their communities in subsequent phases of developing Plan Bay Area 2040.

In 2016, the CBOs, in partnership with MTC and ABAG, administered an online survey about future planning scenarios used to illustrate the potential impacts of Plan Bay Area 2040 to their members. The survey, Build a Better Bay Area, was available in three languages: English, Spanish and Chinese.

At a special Listening Session on the draft scenarios in July 2016, the partner CBOs made a presentation to a joint meeting of MTC's Planning and ABAG's Administrative Committee, to report some of what they had heard from their communities about housing and transportation issues in the Bay Area.

As part of the spring 2017 outreach for Plan Bay Area 2040, MTC and ABAG conducted five focus groups with community-based organizations in May 2017. The goal of each focus group was to get feedback on Draft Plan Bay Area 2040 from underrepresented groups around the Bay Area. To ensure that language was not a barrier to participation, MTC provided translation and interpretation services at the request of the CBO. Simultaneous Spanish language interpretation was provided at two of the five focus groups and simultaneous Chinese language interpretation was provided at one of the five focus groups.

At each focus group, an MTC or ABAG staffer provided a brief presentation to familiarize attendees with Draft Plan Bay Area 2040 and introduce specific components of the Action Plan. A facilitated discussion gathered feedback from attendees on the Action Plan, including recommendations for improving the Draft Plan's performance on housing, economic development and resilience issues. At the end of each focus group, attendees filled out a paper survey.

The five community organizations engaged as part of Plan Bay Area 2040 consisted of:

- Richmond Main Street Initiative (Downtown Richmond and Iron Triangle)

- Rose Foundation for Communities & Environment, New Voices Are Rising (serves Oakland Youth)
- Sela Learning (serves Latino Community, Vallejo)
- Sound of Hope Radio (serves Chinese Community, San Francisco Bay Area)
- South Hayward Parish (food pantry, Southern Alameda County)

There is no statistically significant data on the demographic makeup of the partner CBO's participating members that can be compared with the greater Bay Area. However, public participation best-practices encourage engaging underserved communities in their own neighborhoods and holding public meetings in spaces that are familiar to community members.

By partnering with CBOs, the Plan Bay Area 2040 public outreach and engagement process followed these best-practices to engage with traditionally underserved communities. The resulting feedback via the survey and the Listening Session presentation provided meaningful and actionable feedback to help shape Plan Bay Area 2040. It also offered actionable strategies for improved engagement in future planning processes.

➤ **Action: Display Ads in Community Papers**

In advance of each round of public open houses, MTC purchased display ads in a variety of community papers. In 2015 and 2016, ads with Spanish text ran in two Spanish-language newspapers; similar ads in Chinese ran in a Chinese-language newspaper; and ads in English appeared in a newspaper that reaches the African American community. Display ads in English also ran in local media in the North Bay (Solano and Sonoma counties).

Broad Participation: Performance Target 2

Four thousand or more comments are logged on the Plan Bay Area update or associated documents.

➤ **Action: Comments Generated through Public Outreach and Engagement**

Outreach for Plan Bay Area 2040 exceeded the goal of receiving 4,000 comments on the Plan Bay Area 2040 update. Between 2015 and 2017, there were 4,266 comments received on Plan Bay Area 2040 through public meetings, open houses, letters, emails, comments online, forums and surveys.

In addition to the 4,266 comments received, feedback on Plan Bay Area 2040 was provided by the 921 participants who completed the online Build a Better Bay Area tool and 2,048 registered voters in the 2016 telephone poll conducted in English, Spanish & Chinese.

Broad Participation: Performance Target 3

100,000 visits or "page views" to the Plan Bay Area website.

➤ **Action: Directing Participants to planbayarea.org**

As noted previously in this report, a website dedicated to the Plan Bay Area 2040 update, planbayarea.org, was created to increase transparency in the planning process, simplify information for interested parties and encourage broad participation. The 2040.planbayarea.org microsite, which hosted the Draft Plan and continues to host the Final Plan, was designed and developed with the goal of making the Draft and Final Plans as accessible to the public as possible. The microsite hosted the Plan itself, key reports, videos, and resources for the public, as well as provided opportunity for public comment throughout.

Information related to all phases of the development of Plan Bay Area 2040, as well as information about Senate Bill 375 and the 2013 adopted Plan Bay Area, was and continues to be housed on the website: planbayarea.org. The website provides one “go-to” information source for Plan Bay Area 2040, as required under SB 375. Prior to the release of the Draft Plan in 2017, PlanBayArea.org was made to be mobile friendly and more accessible to participants who use their smartphones to access information about the Plan.

Between November 10, 2014 and Jul 31, 2017, planbayarea.org received 229,492 page views – more than doubling the performance target of 100,000. The website drew 56,858 users during that period, who visited the site 92,862 times. Users visited an average of 2.47 pages per session, spending an average of 2 minutes and 22 seconds on the site.

MTC and ABAG aggressively worked with Bay Area newspapers to disseminate information about the Plan Bay Area 2040 process throughout the region, including encouraging readers to access the web site for more information. MTC and ABAG also encouraged traffic to the websites with e-blasts sent to mailing lists at key milestones throughout development of the plan. Postcards were sent via U.S. Post Office to individuals on the mailing lists with no email address. Both agencies also publicized the website with stories in the ABAG and MTC e-newsletters.

Broad Participation: Performance Target 4

Online engagement options are available for those who are not able to attend meetings.

➤ **Action: Multiple Opportunities for Online Comments**

In addition to the many opportunities to participate in the Plan Bay Area 2040 planning process in person, MTC and ABAG offered multiple ways for interested parties to provide feedback to the Plan online, without ever having to attend a public meeting.

- 2040.planbayarea.org had a built-in comment feature available the entire comment period on the Draft Plan
- The site also referred visitors to a link to submit comments by e-mail to info@PlanBayArea.org
- Open Town Hall Forum offered online comment options that mirrored info and questions being asked at the 2015 and 2016 open houses

Broad Participation: Performance Target 5

Meetings are held in all nine counties, in central locations and accessible by public transit to the extent feasible.

➤ **Action: Convenient Locations to Maximize Participation**

Three rounds of open houses were held in each of the nine Bay Area counties, corresponding with the three planning phases: Goals and Targets (Spring 2015), Scenario Planning (Spring 2016), and the Draft Plan (Spring 2017). Nearly 1,500 people attended the 27 open houses held over those three years.

The open houses were held in locations that were accessible by public transit. A complete listing of open house locations by date and county, including attendance, can be found in Plan Bay Area 2040's Public Engagement supplemental report (see <http://2040.planbayarea.org/reports>).

Broad Participation: Performance Target 6

Meetings are linguistically accessible to 100 percent of participants, with three (3) working days' advance request for translation. (Meeting announcements offer translation services with advance request for translation services.)

➤ **Action: Linguistic Inclusion in Notifications and Meetings**

In advance of the open houses, email blasts were sent to individuals who have asked to be kept informed about the Plan; postcards were mailed to a database list; display ads were purchased in major newspapers around the region; and reporters were briefed about the Plan and news releases sent to local media outlets. Besides outreach to traditional media outlets, ads were purchased on social media sites. These materials had in-language notifications explaining how attendees could ask for linguistic assistance prior to meetings.

Broad Participation: Performance Target 7

All meetings are accessible under the requirements of the Americans with Disabilities Act (ADA).

➤ **Action: Accessible Locations for Inclusive Participation**

The open houses were held in buildings that were ADA accessible. A complete listing of open house locations by date and county, including attendance, can be found in Plan Bay Area 2040's Public Engagement supplemental report (see <http://2040.planbayarea.org/reports>).

Broad Participation: Performance Target 8

Plan Bay Area or elements of it are mentioned in at least 200 radio or TV broadcasts, online forums and blogs, social media, newspaper articles, editorials, commentaries, or other printed media.

➤ **Action: Articles Published about Plan Bay Area**

At major milestones throughout development of Plan Bay Area 2040, MTC and ABAG notified the media via news releases and press advisories. While it was difficult to identify and capture all mentions of Plan Bay Area 2040 in media outlets large and small throughout the region, as well as blogs and other digital postings, MTC did log over 200 mentions in local media outlets and online forums/blogs. The articles and commentary pieces appeared in newspapers large and small in all nine counties and included opinion pieces, editorials and news articles.

Goal 3: Engage for Impact

The third stated goal for the Plan Bay Area 2040 public participation process stressed that feedback received through this Public Participation Plan should be analyzed and provided to policy makers in a timely manner to inform their decisions. Interested participants should be informed of actions by MTC and ABAG at key milestones throughout the planning process.

This goal includes three specific performance targets specified throughout this section of the report. The first specific performance target is as follows:

Engage for Impact: Performance Target 1

One hundred percent of written correspondence received is logged, analyzed and shared in a timely manner with staff and policy makers for consideration.

➤ Action: Timely Recording and Reporting of Comments

All comments received during the Plan Bay Area 2040 planning process were cataloged, analyzed, and summarized for presentation to policy board members and for posting online. Any handwritten comments received at open houses or other public forums were typed and similarly posted online. Comments from all phases of the Plan Bay Area 2040 planning process are available online at planbayarea.org/get-involved/your-comments.

Input and comments from stakeholders and the general public over the multi-year process of building the plan were presented to the policy board members as shown below.

- **Goals and Targets (2015):** A summary of what we heard at the spring 2015 open houses and from online comments was presented to the MTC and ABAG policy makers at the June 2015 joint meeting of the MTC Planning Committee and the ABAG Administrative Committee.
- **Scenario Planning (2016):** A presentation to MTC and ABAG policymakers in July 2016 summarized what we heard from the spring 2016 round of open houses and online survey on three alternative planning scenarios.
- **Release of Draft Plan (2017):** At the June 2017 meeting of the Joint MTC Planning Committee with the ABAG Administrative Committee, staff presented a summary of public input from the open houses, public hearings and community focus groups help after release of the Draft Plan Bay Area 2040.

Engage for Impact: Performance Target 2

One hundred percent of written correspondence is acknowledged.

➤ **Action: Timely and Complete Response to Comments**

In keeping with the principle laid out in the Public Participation Plan, that people who take the time and energy to participate should feel it was worth their while to join in the discussion, every written comment submitted during the PBA 2040 planning process was answered with a letter of acknowledgement. During the Scenario and Draft Plan phases, comments were answered with individual responses.

Engage for Impact: Performance Target 3

Policy decisions and other actions are summarized and reported back to the database of interested residents at key milestones in the process.

➤ **Action: Timely and Accessible Updates to Participants**

MTC and ABAG sent 14 email newsletters to interested parties between 2015 and 2017, sharing information about the status of the plan and upcoming engagement opportunities. They can be found online at planbayarea.org/news/newsletters.

MTC to provide a listing of all email blasts sent to inform. Could also include info like how people subscribed, total number of subscribers, etc.

Goal 4: Build Knowledge

The fourth stated goal for the Plan Bay Area 2040 public participation process identified that this program is an opportunity for MTC and ABAG to inform a wide range of people about transportation and land-use issues in the Bay Area. Each step of the process should include an educational element to set context and promote increased understanding of the plan and relevant topics.

This goal has one specific performance target: *Sixty percent of participants surveyed “strongly agree or agree” with statements that rate Plan Bay Area 2040 public participation efforts provided:*

- *Sufficient opportunity to comment/ask questions*
- *Clear information at an appropriate level of detail*
- *An opportunity to learn about transportation and land use issues*
- *An opportunity to hear other perspectives and different points of view*

➤ **Action: Ensure Participant Engagement**

Participants in the Plan Bay Area 2040 process were given multiple opportunities to share feedback, not only on the Plan itself, but on the engagement process. Attendees at the three rounds of open houses that took place in each of the Bay Area’s nine counties (in spring 2015, 2016, and 2017) were invited to fill out a comment card about their experience at the events. Furthermore, participants often commented on the Plan Bay Area 2040 engagement process

within their comments about the plan itself. Participants were also given the opportunity to share comments on the engagement process through email or the website.

A very limited number of attendees chose to complete evaluation forms following the three rounds of open houses in each county. However, those that did share their feelings about the engagement process gave MTC and ABAG high marks for the open house format which allowed for one-on-one conversation with informed staff members who were able to answer questions and engage attendees during the drop-in sessions. Their positive responses far exceeded the 60 percent benchmark outlined by the performance target.

The following numbers represent the percentage of those who agreed or strongly agreed with the following questions, based on evaluation forms collected at the open houses:

I found the Open House useful and informative

- 2015: 95 percent of respondents agreed or strongly agreed
- 2016: 97 percent of respondents agreed or strongly agreed
- 2017: 98 percent of respondents agreed or strongly agreed

I was able to ask all of my questions

- 2015: 91 percent of respondents agreed or strongly agreed
- 2016: 97 percent of respondents agreed or strongly agreed
- 2017: 93 percent of respondents agreed or strongly agreed

I had the opportunity to provide comments

- 2015: 98 percent of respondents agreed or strongly agreed
- 2016: 100 percent of respondents agreed or strongly agreed
- 2017: 98 percent of respondents agreed or strongly agreed

I learned more about Plan Bay Area 2040

- 2015: 97 percent of respondents agreed or strongly agreed
- 2016: 97 percent of respondents agreed or strongly agreed
- 2017: 97 percent of respondents agreed or strongly agreed

The meeting materials and displays were clear, with the right level of detail

- 2015: 90 percent of respondents agreed or strongly agreed
- 2016: 93 percent of respondents agreed or strongly agreed
- 2017: 96 percent of respondents agreed or strongly agreed

In addition to the limited quantitative data available, qualitative data in the form of open ended comments from the three phases of outreach indicate that the Open House format was largely successful and that attendees valued the opportunity for one-on-one engagement with MTC and ABAG staff – the type of engagement that can be precluded by a presentation-format.

- “Great forum. The setup of having each station accessible at any time with sticky notes to voice personal opinions is a fantastic way to educate the public. Make people [not legible] and make people feel heard without subjecting everyone else to every individual comment.” – 2015 Open House attendee
- “Lots of good info during the meeting. There were several chances to give feedback at stations.” – 2015 Open House attendee
- “I would have appreciated several speakers. It would have been helpful for me, who knew nothing about Plan 2040.” – 2015 Open House attendee
- “This was a much better workshop/open house than the workshops of four years ago. Fortunately, there were no clickers! The staff was better prepared and more respectful... the presentation strayed into background, and Vital Signs then rushed the scenarios so it was not possible to pick up much. Using staffers who live in Marin was clearly a good choice.” – 2016 Open House attendee
- “Some posters were a little too ‘governmental.’ I need some plain-speaking ones.” – 2016 Open House attendee
- “I greatly appreciate the open house, the opportunity to see progress from year-to-year, the commitment of the staff, agencies and leaders involved in the efforts to make Plan Bay Area a reality. I commend those involved for the time and effort they take to make a complex, long-range plan understandable to the general public and also to make the “deep dive” info available for those of us who are a bit more ‘geeky.’ Thank you.” – 2017 Open House attendee
- “Thank you for an informative and successful workshop. Public displays were helpful, speakers knowledgeable and responsive to questions! This is a great model!” – 2017 Open House attendee
- “Some of the boards were difficult to read from a distance.” – 2017 Open House attendee

The drop-in, open house style forums were designed to increase just this type of engagement with attendees and lower the bar for participation. However, there were a number commenters who felt that the Open Houses would have benefitted from a presentation:

- “This format doesn't provide me the opportunity for public comment. It is hard to understand it without a public workshop.” – 2015 Open House attendee
- “I want a public workshop so I can hear what others are saying.” – 2015 Open House attendee

Recommendations

Plan Bay Area elicited broad participation from a wide range of perspectives, with many people participating in a regional planning process for the first time. The following recommendations are based on feedback from participants throughout all phases of the outreach program, as well as specific observations and insights contributed by MTC staff and consultants. In addition, interviews were conducted with a number of advisory board members who contributed to the Plan Bay Area 2040 process. A full list of interview participants can be found in the Appendix.

Presentation of Materials

1. MTC and ABAG did an excellent job at making materials accessible to laypeople during Plan Bay Area 2040 outreach. This should continue to be a priority in the future, particularly avoiding acronyms and overly technical details.
2. Maps, infographics and other engaging visual aids were a successful way to share information during this update. Continue to use images and infographics to capture a lot of complex information in limited space.
3. Emphasize the necessity of regional planning – and the dire consequences of failing to plan – to help Bay Area residents better understand the value of Plan Bay Area 2040. Materials used for Plan Bay Area 2040 sometimes seemed to present solutions before clearly laying out the problems that they aimed to address.

Open Houses

1. Drop-in open houses allow people to go to the material or issues of most interest to them – they are an appropriate format for this type of engagement.
2. Continue to prioritize workshop locations near transit.
3. The response to comments was successful in making people who participated remotely feel “heard.” Consider building on that responsiveness with additional online town halls or online Q and A sessions to engage people who can’t attend meetings in a more immediate way.
4. MTC and ABAG will need to continue to strive for a balance between the engagement made possible by Open House formats, which provided opportunities for one-on-one conversations and allow participants to drop in at any time during the event for as long or as little as they like versus a more traditional presentation with an interactive discussion or question-and-answer session.
5. Consider a greater number of lower-cost events – with just two or three staff participating – to reach more individuals. Training should be provided to staff to maximize the chance of success for new event types.

Making Elected Officials Ambassadors of the Plan

1. Members of the advisory committees who were interviewed for this report requested additional outreach to local governments. They encouraged recruiting elected officials who are already having conversations with constituents on local levels to spread the word about the value of participation in the Plan Bay Area 2040 process.

2. Develop media toolkits to help local electeds talk about PBA with their colleagues and constituents, including talking points for public meetings and newsletter blurbs as well as pre-written social media posts with images that are easy to upload and post. Consider developing monthly talking points to be used by elected officials as well as staff members for sustained jurisdictional outreach.

Promotion of Engagement Opportunities

1. Consider more robust media outreach for sharing information about Plan Bay Area 2040 (what it is, current status, ways people can contribute) and for publicizing opportunities for engagement (e.g. public workshop schedules).
2. Consider paying for more prominent treatment on social media, especially at key decision points in the planning process.
3. Despite the extensive outreach conducted by MTC and ABAG in advance of the three rounds of Open Houses, a number of commenters noted that they would have appreciated additional notice. While the commenters did not offer suggestions on what modes of communication would have been more effective for them, it is something for MTC and ABAG to consider as they move into the next round of engagement.
4. Prioritize outreach for high school and college students. Given that the youngest generation is the most likely to be pursuing employment, commuting across the region, and buying a home in year 2040, more thought should be given to engaging this demographic.

Clarifying the Role of MTC and ABAG in Regional Planning

1. Interviews with advisory board members and feedback from workshops indicated that there is a perception among laypeople that MTC and ABAG are responsible for not just studying Plan Bay Area and making some recommendations, but that the agencies are also responsible for implementing changes. Clarifying the role of the agencies, as well as the way in which Plan Bay Area 2040 is used after it is adopted, may soften the perception by participants that changes are being imposed upon them.
2. Consider ways to streamline MTC and ABAG meetings to make it easier for the public to participate. MTC and ABAG both have advisory committees, and there are a number of staff-level technical committees. For the next plan, some thought should be given to ways to better integrate or streamline these groups so the public has a clearer sense about opportunities to engage. By doing so, the process will be less cumbersome and staff will not have to make multiple duplicate presentations to similar groups.

Appendices

Appendix 1: Plan Bay Area 2040 Public Meetings 2014-2017

Meeting/Event	Special Workshop or Open House	ABAG/MTC Policy & Advisory Committees with Plan Bay Area 2040 on agenda	Totals
2014			
Public Meeting: Approach to the 2015 Public Participation Plan Update (Oct. 8, 2014)	1		1
MTC Policy Advisory Council		4	4
ABAG Regional Planning Committee		3	3
Regional Advisory Working Group		1	1
ABAG Administrative/MTC Planning Committee		1	1
ABAG Executive Board		3	3
2015			
Spring 2015 Open Houses: all nine counties	9		9
MTC Policy Advisory Council		6	6
ABAG Regional Planning Committee		2	2
Regional Advisory Working Group		8	8
Plan Bay Area 2040 Performance Working Group		6	6
Regional Equity Working Group		6	6
The Bay Area Partnership Board		1	1
The Partnership Technical Advisory Committee		3	3
ABAG Administrative/MTC Planning Committee		8	8
ABAG Executive Board		5	5
MTC Commission		4	4

Meeting/Event	Special Workshop or Open House	ABAG/MTC Policy & Advisory Committees with Plan Bay Area 2040 on agenda	Totals
2016			
Housing Forum: Calling the Bay Area Home (Saturday, Feb. 20, 2016)	1		1
Spring 2016 Open Houses: all nine counties	9		9
Environmental Impact Report Scoping Meetings: Oakland, San Jose, Santa	3		3
MTC Policy Advisory Council		8	8
ABAG Regional Planning Committee		4	4
Regional Advisory Working Group		7	7
Regional Equity Working Group		3	3
Native American Tribal Consultation	1		1
The Bay Area Partnership		5	5
The Partnership Technical Advisory Committee		6	6
ABAG Administrative/MTC Planning Committee		5	5
MTC Planning Committee		6	6
Bay Area Regional Collaborative		1	1
ABAG Executive Board		7	7
MTC Commission		3	3
MTC Commission Workshop	2		2
ABAG Executive Board/MTC Commission		1	1

Meeting/Event	Special Workshop or Open House	ABAG/MTC Policy & Advisory Committees with Plan Bay Area 2040 on agenda	Totals
2017 (through June 2017)			
Spring 2017 Open Houses: all nine counties	9		9
Public Hearings on Draft Plan Bay Area 2040 and on Draft Environmental	3		3
Community-Hosted Focus Groups	5		5
Presentations to Elected Officials (with county Congestion	10		10
MTC Policy Advisory Council		5	5
ABAG Regional Planning Committee		1	1
Regional Advisory Working Group		5	5
Regional Equity Working Group		3	3
Air Quality Conformity Task Force		3	3
The Partnership Technical Advisory Committee		1	1
Native American Tribal Consultation	1		1
ABAG Administrative/MTC Planning Committee		4	4
ABAG Executive Board		1	1
ABAG Executive Board/MTC Commission		1	1
Totals			195

Appendix 2: Participants in Plan Bay Area 2040 Outreach Evaluation Interviews

The following individuals were interviewed for this report and provided feedback about outreach associated with PBA 2040:

- ABAG Chair and Chair of the ABAG Administrative Committee during development of Plan Bay Area 2040 Julie Pierce
- MTC Vice Chair and Alameda County Supervisor Scott Haggerty
- MTC Planning Committee Chair, MTC Commissioner Jim Spering
- ABAG Executive Board Member and Novato City Council Member and Marin County Plan Bay Area Open House Emcee Pat Eklund