2014 TMA Survey was developed by ACT TMA Council, CUTR, and UrbanTrans
Overview

- Background on the survey
- What is a TMA?
- TMA structure and motivations
- TMA budgets
- Measuring performance
- Next steps
TMA Defined
If it looks like a duck …

- An organized group applying carefully selected approaches to facilitating the movement of people and goods within an area. TMAAs are often legally constituted and frequently led by the private sector in partnership with the public sector to solve transportation problems.

Source: TMA Handbook (2001)
Key Motivations (2009)

- Congestion
- Improving the viability of non SOV access
- General growth trends
- Interest in working together/more efficient...
- Air pollution
- Government regulations/trip reduction...
- New property development projects
- Employee recruitment and retention challenges
- Parking
- Interest in advocacy
- Global climate change

2009 survey allowed multiple responses
Top 3 Key Motivations (2014)

- Improving the viability of non SOV access
- Congestion
- Interest in working together/more efficient...
- General growth Trends
- Global climate change
- Employee recruitment and retention challenges
- New property development projects
- Parking
- Interest in advocacy
- Air pollution
- Government regulations/trip reduction...

2014 survey allowed only 3 responses
Answers weighted 11 points for Top priority, 10 points for 2nd Highest Priority and 9 points for 3rd Highest Priority.
Score divided by maximum score possible (63 responses x 11 points)
Is your TMA a subsidiary, or an internal department, of an incorporated parent organization?

N=58

- Yes: 37.9%
- No: 62.1%
Is Your TMA Independently Incorporated?

N = 38

- Yes: 89.5%
- No: 10.5%
### Flexibility of Organizational Structure

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>501(c)(3)</td>
<td>35%</td>
<td>21%</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>501(c)(4)</td>
<td>30%</td>
<td>27%</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>501(c)(5)</td>
<td>--</td>
<td>1%</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>501(c)(6)</td>
<td>13%</td>
<td>7%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Total TMAs incorporated</td>
<td>78%</td>
<td>56%</td>
<td>65%</td>
<td><strong>46%</strong></td>
</tr>
</tbody>
</table>
Parent Organization Type

- Local government agency or department: 36.4%
- Business Improvement District (or similar self-taxing district): 18.2%
- Chamber of Commerce / Boards of Trade / membership-based business association: 13.6%
- Public transportation / transit organization: 13.6%
- Other (e.g., private non-profit): 9.1%
- N=22
Parent Organization (n=20)

<table>
<thead>
<tr>
<th>U.S. Incorporation status of parent organization</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>501(c)(3)</td>
<td>20%</td>
</tr>
<tr>
<td>501(c)(4)</td>
<td>15%</td>
</tr>
<tr>
<td>501(c)(6)</td>
<td>5%</td>
</tr>
<tr>
<td>Not a US TMA</td>
<td>20%</td>
</tr>
<tr>
<td>Other</td>
<td>15%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>25%</td>
</tr>
</tbody>
</table>
Distribution of Voting Members by Type

- Employers
- Developers
- Property managers
- National government
- State/provincial government
- Metropolitan Planning Organization (US)/Greater regional planning organization
- Local government (City / county / region)
- Public transportation agency
- Elected public official
- Non-governmental organization
- TMA Executive Director
- Other
Which of the following best describes the terms that your board members serve?

- Terms are for a set number of years: 46.3%
- Terms vary by seat: 25.9%
- Term duration not defined: 18.5%
- We have no board members: 9.3%

N=54
How Many Years Do Board Members’ Terms Last?

N = 23

- 39.1% 1 Year
- 43.5% 2 Year
- 17.4% 3 Year
Types of policy or service committees operating within your TMA

- Executive committee
- Project specific committees or task forces
- Budget/Finance
- Membership recruitment
- Government affairs/advocacy
- Convention / meetings
- None
- Other
Types of Documents Maintained by TMA

- Mission Statement: 80%
- Objectives: 60%
- Short-term year work: 50%
- Bylaws: 40%
- Strategic plan: 30%
- Policies and procedures: 20%
- Employee manual: 10%
The majority of staff are employed directly by the TMA and/or the majority of staffing needs are contracted to an external provider. The TMA has no dedicated staffing.
Share of Staff with Backgrounds in These Areas

- Marketing
- Transportation Planning
- Non-profit/association...
- Public Administration...
- Public Relations
- Land use/ environmental...
- Transportation Engineering

- 1 employee
- 2 employees
- 3 employees
- 4 employees
- 5 employees
- 6 or more employees
Percent of TMAs That Share Staff with Another Organization

N=57

- Yes: 38.6%
- No: 61.4%
Full-Time Equivalent Staff

N=57
TMA Executive Directors’ Professional Backgrounds

- Primary Experience
- Secondary Experience
- Neither
TMA Executive Director Annual Salary

Percent of TMA Salaries

- 30,000 - 49,999: 8.7%
- 50,000 - 59,999: 8.7%
- 60,000 - 69,999: 13%
- 70,000 - 79,999: 10.9%
- 80,000 - 89,999: 21.7%
- 90,000 - 99,999: 6.5%
- 100,000 - 124,999: 26.1%
- 125,000 - 149,000: 4.3%
Years as TMA Executive Director

![Graph showing years as TMA Executive Director with bars for valid percent and line graph for cumulative percent.]

- Y-axis: Cumulative Percent
- X-axis: Years
- Color codes: Green for Valid Percent, Brown for Cumulative Percent
Years of TDM Experience of the TMA Executive Director
Benefits Provided to TMA Staff

Provided by TMA

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Provided by TMA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Insurance</td>
<td>61.4%</td>
</tr>
<tr>
<td>Dental/Vision Insurance</td>
<td>52.6%</td>
</tr>
<tr>
<td>Retirement Contribution (e.g., 401k)</td>
<td>50.9%</td>
</tr>
<tr>
<td>Subsidized Transit/Vanpool/Bicycle</td>
<td>31.6%</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>26.3%</td>
</tr>
<tr>
<td>Paid Maternity/Paternity</td>
<td>26.3%</td>
</tr>
<tr>
<td>Free Parking</td>
<td>24.6%</td>
</tr>
<tr>
<td>Pre-tax Transit/Vanpool/Bicycle</td>
<td>17.5%</td>
</tr>
<tr>
<td>Tuition Assistance</td>
<td>15.8%</td>
</tr>
<tr>
<td>None of the above</td>
<td>14.0%</td>
</tr>
</tbody>
</table>
TMA Annual Budget

Share of TMA (n=71 in 2009 and n=51 in 2014)
TMA Reserve Operating Fund

N=49

- Yes: 59.20%
- No: 34.70%
- Do not know: 6.10%

N=25
Budget Allocations

- Staffing / personnel (including direct and contract staffing, plus benefits)
- Office operations (including office space, insurance, utilities, etc.)
- Professional administrative services (e.g., accounting, legal)
- Consulting
- Marketing and promotions
- IT services / products, communications
- Member services (provided to member businesses, travelers, stakeholders)
- Measurement and evaluation (e.g., surveys)
- Research
- Other:
TMAs That Fund Shuttle/Transit Operations

N=50

Yes: 22.0%
No: 78.0%

N=8

5%: 10%
50%: 30%
60%: 10%
65%: 10%
76%: 10%
80%: 10%
TMA Funding Sources

- % Membership dues
- % Fees for services
- % Service contracts / brokered services
- % Developer funding agreements
- % Business Improvement District (or similar taxing district)
- Any gov't grant
- % Foundation / other grants
- % Vanpool revenues
- % Shuttle / transit revenues
- % Parking fees
- % Advertising / sponsorships
TMA Funding Sources with Government Grant Detail

- %Membership dues
- %Fees for services
- %Service contracts / brokered services
- %Developer funding agreements
- %Business Improvement District (or similar taxing district)
- %National/federal government grants
- %Regional government grants
- %State government grants
- %Local government grants
- %Foundation / other grants
- %Vanpool revenues
- %Shuttle / transit revenues
- %Parking fees
- %Advertising / sponsorships
- %Public transportation / transit pass sales
- %Other
Year of TMA Formation

31% of TMAs have been in existence for 20 or more years
75% of TMAs have been in existence for 10 or more years
11% of TMAs have been in existence for 3 or fewer years
TMA Budgets over past 3 years

- Increased significantly
- Increased slightly
- Stayed about the same
- Decreased slightly
- Decreased significantly
- TMA is less than 3 years old

54% increased significantly or slightly
TMA Offers Memberships

N=53

- Yes - we offer organizational memberships to the TMA (54.7%)
- Yes - but indirectly, all organizations that are members of our parent/partner organization automatically become TMA members (26.4%)
- All organizations in our area are automatically eligible to receive TMA services (e.g., because they are within a Business Improvement District, or similar) (7.5%)
- No - we do not offer organizational memberships (7.5%)
- Other (3.8%)

54.7% respondents indicate that TMA offers memberships, with 26.4% indicating that memberships are indirectly available to all organizations within their area.
TMA Has Membership Fees

N=51

43.1% Yes
56.9% No, memberships are free
Most Successful Ways to Recruit New Members - Problem Focused

- Reducing parking supply challenges (and thus also skewing it as a business/money saving solution for those who pay for parking)
- Employee benefit/retention/recruitment
- Corridor strategies (i.e., near existing businesses)
- Putting your business case in terms of solving a need they have
- Areas with traffic congestion and construction
- Describing mission and finding commonalities of interests. Focusing on employee retention and attraction.
- When they move to the precinct (or renovate within the precinct) and are subject to stringent new parking maximums by the local government.
- Satellite offices of core members
Most Successful Ways to Recruit New Members - Referrals

- Introductions from local leaders (councillors, senior municipal staff)
- Referrals from local leaders i.e. Mayor, Councillor, City Director
- Engagement with municipal Economic Development teams to target employers moving to the area.
- Helpful for prospect to see list other members.
- Peer to peer contact
- Summary of services, benefits, achievements and activities
- Pitching membership as a business/money saving solution
- Building relationships
Most Successful Ways to Recruit New Members - Outreach

- Contact through staff or board member.
- Recruitment breakfasts
- Face to face meeting (as a result of a cold call, drop in visit, newspaper article, community meeting - mostly cold calls, however)
- Demonstrating value for the dues paid.
- Direct contact via our outreach staff. Contact is made with employer for the purpose of introducing employees to the varied transportation and financial benefits available by joining the TMA organization.
- Direct engagement and recommendations from neighbor companies.
- Engaging them and educating about local mobility issues.
- One on one outreach to educate on TMA programs and services.
Most Successful Ways to Recruit New Members - Networking

- Recruitment breakfasts/networking sessions
- Our membership is fairly static at this point. Most of the businesses in Redmond are members. Although we only have 33 or 34 dues paying members, that represents around 300 actual businesses because we have large retail regions under one membership, several business and industrial parks, under one membership. We recruit new members as they move into the region and we offer lower cost memberships to small independent businesses not affected by TMPs or CTR.
- We find it’s maximizing our network and being very active in the community.
- Relationship-building through existing members, Chamber of Commerce, Committees, etc. Providing services that meet air quality program requirements
- Networking, then presentations
- Referrals from current members; face to face meetings; inviting potential members to our membership meetings so they can meet other members and see the value of being involved.
Most Successful Ways to Recruit New Members - Services

- Provision of service important to local constituency
- Participation in our shuttle service requires TMA membership
- Sell transit passes, partner with green teams, find executive champion
- Key messaging includes Emergency Ride Home program and no cost services/membership.
- EMERGING - coordinated efforts / learning from each other's experiences to provide scalable solutions and "handbooks" or "guides". E.g., employer guide to implementing paid parking - successes and challenges.
- Send letter and follow up with a phone call or email
- Show them the benefits of the Smart Commute program and how this can help their employees improve their commutes.
- The distribution of our FY Annual Report yielded two new board members. The members of our Board of Directors are continuously seeking additional opportunities for the TMA partnership.
Most Successful Ways to Recruit New Members - Incentives

- The most successful way is offering affordable or subsidized membership dues. Membership is also attractive to businesses and developers experiencing parking constraints and/or who have an interest in offering/creating a sustainable transportation business/community. Acquiring new membership through state and regional policy would prove to be successful in recruiting new members, although not currently the case in my region/state.
- Through existing members, word of mouth, industry groups (e.g., we have a lot of TDM engineering and consulting firms in our TMA); an active Advisory Board; dealing with Economic Development in the 2 Municipalities we cover; referrals by Mayors and councils.
- Through existing relations that our parent organization has with other businesses.
- We are known for our excellent programs, which attracts new members. Word of mouth from existing members in very important (we have an active membership committee). We are also engaged in much outreach, thereby bringing us involvement with potential new employers. We are also in a dynamic growing area, and represent several of the most powerful economic engines/employers in our region, who are regular participants in our programs.
- We have not actively recruited new members in several years. We are in the process of trying to think about recruiting new members and how to best go about that.
- When a current members refers them and makes the contact and recruits them. Businesses that need you are the ones that become members. It is for employee recruitment or economic reason - we never hear about air quality.
- Work with them previously as part of a project, offer continued services with membership.
Basis of Annual Membership Dues Assessments*

*N=57

- By number of employees
- Flat or fixed rate
- Negotiated rates (case by case...)
- By building area (per square foot)
- Not applicable
- Other

* Multiple responses possible
TMAs continue to focus primarily on the commute trip market (90% report commute market makes up at least 50%) but some TMAs are more diversified.
Shares of Travelers Served by Type

*TMAs are sorted from the largest to the smallest target markets
Geographic scope of your TMA's service area

(N=49)

- Regional, multiple jurisdictional: 36.7%
- Citywide / countywide, single jurisdiction: 18.4%
- Central business district / City center / Downtown: 14.3%
- Suburban business precinct / activity district: 12.2%
- Inner urban business precinct / activity district: 10.2%
- Corridor: 4.1%
- Specialized activity center: universities: 4.1%
## TMA Services

<table>
<thead>
<tr>
<th>Service</th>
<th>2014 Rank</th>
<th>2009 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRH/ERH</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Promotional Events</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Rideshare Matching</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>Promotional/Marketing Materials</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>ETC Training</td>
<td>5</td>
<td>9</td>
</tr>
<tr>
<td>Cycling program assistance</td>
<td>6</td>
<td>10</td>
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<tr>
<td>Email newsletters</td>
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<tr>
<td>Social media</td>
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<td>Advocacy</td>
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<tr>
<td><strong>Subsidized Transit Passes</strong></td>
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<td>21</td>
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<tr>
<td>Telework Asst</td>
<td>9</td>
<td>20</td>
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<td>Vanpool services</td>
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<td>22</td>
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<tr>
<td><strong>Carshare program</strong></td>
<td>13</td>
<td>39</td>
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<tr>
<td>Employer networking events</td>
<td>13</td>
<td>12</td>
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<tr>
<td>Incentives for Alternative mode use</td>
<td>13</td>
<td>18</td>
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<tr>
<td>Advocate for infrastructure issues</td>
<td>16</td>
<td>NA</td>
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</table>

<table>
<thead>
<tr>
<th>Service</th>
<th>2014 Rank</th>
<th>2009 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Travel Surveys</td>
<td>16</td>
<td>2</td>
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<tr>
<td>Parking Management Planning</td>
<td>16</td>
<td>13</td>
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<tr>
<td>Transit pass sales</td>
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<td>11</td>
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<tr>
<td>Trip Reduction Plan</td>
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<td>4</td>
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<tr>
<td>Shuttle/Transit provision</td>
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<td>24</td>
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<td>Tax benefit program assistance</td>
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<td>17</td>
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<tr>
<td>Personalized journey planning</td>
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<td>19</td>
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<tr>
<td>Real-time Travel alerts</td>
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<tr>
<td>Web-based mapping /Journey planner</td>
<td>24</td>
<td>27</td>
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<tr>
<td>Individualized marketing</td>
<td>26</td>
<td>19</td>
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<tr>
<td>Land use / site design assistance</td>
<td>26</td>
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<td>Bikesheet</td>
<td>28</td>
<td>NA</td>
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<tr>
<td>Relocation services</td>
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<td>16</td>
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<tr>
<td>Sample workplace commute policies</td>
<td>28</td>
<td>NA</td>
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<tr>
<td>Market research / focus groups</td>
<td>31</td>
<td>NA</td>
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<tr>
<td>Vanpool Subsidies</td>
<td>31</td>
<td>26</td>
</tr>
<tr>
<td>Freight delivery plans</td>
<td>33</td>
<td>30</td>
</tr>
</tbody>
</table>
Required Membership in TMA

Are all or some organizations in your area required to actively participate in the TMA (for example, due to a government policy or condition of development approval)?

- 80%: No, all participation is voluntary
- 20%: Yes, some organizations are required to participate
<table>
<thead>
<tr>
<th>Percent of Respondents</th>
<th>Measurement Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>58.7%</td>
<td>Survey travelers at workplaces or site level to assess travel modes and patterns</td>
</tr>
<tr>
<td>58.7%</td>
<td>Survey employers to assess satisfaction with TMA programs or test interest in future services</td>
</tr>
<tr>
<td>49.2%</td>
<td>Track website visitors</td>
</tr>
<tr>
<td>46.0%</td>
<td>Tracking emails/calls received in response to a marketing/outreach campaign</td>
</tr>
<tr>
<td>46.0%</td>
<td>Survey participants in a specific program (e.g., rideshare database members, vanpoolers)</td>
</tr>
<tr>
<td>39.7%</td>
<td>Encourage travelers to log daily/week trips online (or similar)</td>
</tr>
<tr>
<td>31.7%</td>
<td>Gather raw transport use data such as traffic counts</td>
</tr>
<tr>
<td>23.8%</td>
<td>Survey travelers at a TMA-wide level (e.g., phone surveys, intercept surveys) to assess travel modes and patterns</td>
</tr>
<tr>
<td>15.9%</td>
<td>Parking counts</td>
</tr>
<tr>
<td>1.8%</td>
<td>None</td>
</tr>
</tbody>
</table>
Self-Reported Degree of Success for the Following Outcomes

- Maintaining high level of organizational member satisfaction...
- Reducing SOV at the workplace
- Increasing demand for TMA services by travellers
- Reducing SOV at the TMA-wide level
- Reducing parking demand
- Lowering the TMA's cost per unit of pollution reduction
- Lowering the TMA's cost per trip reduced
- Lowering the TMA's cost per VMT/KMT reduced

- Very Successful
- Somewhat Successful
- Neutral
- Somewhat Unsuccessful
- Unsuccessful
- Very Unsuccessful
- Do not use to measure success
TMA Health

- TMA staff is thoroughly trained and prepared (N=48)
- TMA staff turnover is very low (N=47)
- There is a large amount of economic development occurring within the TMA’s service area (N=47)
- The TMA’s service area is distinct and widely recognized (N=46)
- The TMA’s external stakeholders are strongly committed to the organization (N=48)
- TMA Board members are actively involved in supporting the TMA (N=43)
- The TMA’s funding sources are stable, i.e., at least 60% of your TMA’s funding automatically renews each year or is very likely to automatically renew. (N=48)
- The TMA’s service area suffers from significant transportation and access issues (N=47)

- Strongly agree
- Agree
- Somewhat agree
- Neutral
- Somewhat disagree
- Disagree
- Strongly disagree
Memberships in Other Associations

(N=63)

- Association for Commuter Transportation (ACT)
- Best Workplaces for Commuters (BWC)
- American Public Transit Association (APTA)
- Association for Commuter Transportation (ACT)
- Urban Land Institute (ULI)
- American Planning Association (APA)
- Community Transportation Association of...
- Transportation Research Board (TRB)
- Other
Are TMAs Reducing Reliance on Membership Dues?

**2009**
- 20% of respondents receive 90% or more of their revenue from membership dues
- 21% of respondents receive 10% or less of their revenue from membership
- 42% do not receive any income from dues at all

**2014**
- 4% of respondents receive 90% or more of their revenue from membership dues
- 56% of respondents receive 10% or less of their revenue from membership
- 47% do not receive any income from dues at all
Points to Ponder

- Are incorporated TMAs disappearing or simply do not identify themselves as a TMA?
- TMAs continue to be diverse on many levels
- Membership
- Not all TMAs are on a shoestring
- TMAs have support from stakeholders
- Success is different for different TMAs
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