Introduction

The Atlanta Regional Commission’s (ARC) Mobility Services Group is seeking proposals from experienced and qualified organizations to coordinate and manage Transportation Demand Management (TDM) Services in each of the identified Transportation Management Association (TMA) areas in the Atlanta region.

The goal of TDM Services is to increase the use of travel modes other than single occupant vehicles by establishing, maintaining and enhancing partnerships with employers, property managers and commuters in designated areas of the region to implement programs that encourage employees to commute by using alternatives to driving alone. Effective implementation of these programs will result in spreading peak period congestion, decreased single occupant vehicle (SOV) trips, reduced vehicle miles traveled (VMT), and reduced emissions throughout the region.

The funding for this work is provided through a federal-aid program, Congestion Mitigation and Air Quality (CMAQ) at 80 percent, thus requiring 20 percent matching funds from non-federal sources. Only labor costs associated with the tasks identified in Exhibit A are eligible for reimbursement. In addition, successful proposer(s) must provide sufficient funding for the 20% local match. Any contract award for this work is contingent upon ARC receiving adequate funding for this purpose from the Georgia Department of Transportation (GDOT).

Background & Program Description

One of the fastest growing in the nation, the Atlanta region is expected to continue experiencing population and employment growth over the next two decades. An additional 2.9 million residents are forecast to move to the Atlanta region by 2050. By the standards of many metro areas around the country, the Atlanta region currently is and will continue to be a low-density metro area. Strong employment growth is also forecast, with the region providing over 4.7 million jobs by 2050, up from roughly 3.6 million jobs today. However, unlike projected population growth, future employment opportunities are forecast to cluster in major established activity centers such as Downtown, Midtown, Buckhead, Perimeter Center and Hartsfield-Jackson Airport. These employment centers lack overall housing options, especially affordable options for those making less than 80 percent of the region’s median income. Thus, many of the region’s lower-wage workers must drive long distances to access their jobs.

These forecast trends will increase levels of traffic congestion, thereby further taxing the region’s multimodal transportation system. Without improved management of this system
through a suite of strategies that increase system efficiency, the region faces serious threats to competitive advantage over peer regions when attracting or keeping businesses and jobs.

As part of a larger effort to manage and alleviate stress on the region’s transportation system, the Atlanta region’s TDM program seeks to reduce existing and anticipated congestion and improve the region’s air quality. TDM efforts in the Atlanta region are focused primarily on education and outreach to commuters, employers, and property managers located in regional employment centers. However, these efforts should be considered within the broader context of The Region’s Plan, a comprehensive, long-range vision designed to ensure the region’s future success and improve quality of life. The Atlanta Regional TDM Plan considers TDM strategies within this broader context, helping stakeholders build on the TDM concepts within the Region’s Plan by focusing on four major objectives:

- Better integrating travel planning with transportation planning and system operations;
- Maximizing the value, connectivity, and efficiency of existing transportation infrastructure;
- Achieving cost savings through better coordination of existing efforts; and
- Establishing a framework for funding decisions to support program innovation and long-term strategies.

The TDM Plan has influenced this request for proposals and it is strongly suggested that respondents to the RFP familiarize themselves with both The Atlanta Region’s Plan and the TDM Plan prior to preparing a response.

Moving forward, ARC will further focus the current state of TDM by specifically addressing the following issues:

- Increased roadway construction;
- Relocation of employers to major activity centers;
- Decline in participation of the regional incentive programs;
- Decreased carpooling as a mode and increased teleworking regionally;
- Rise of new forms of transportation such as Technology Network Companies and autonomous vehicles; and
- Continued evolution of standardizing measurements for outcomes of TDM efforts at employer partner sites and within Transportation Management Associations (TMA) areas.

In order to reinforce the regional nature of the program being supported by implementation in TMA areas and to continue to address the overarching goals of reducing congestion and improving air quality, measures and performance targets for each TMA area will be determined. These measures and targets will continue to require contractors to collect employer partner level site data about the commute habits of employees in the form of surveys, mode counts, and/or transit pass sales. Mode counts will be captured in the Atlanta regional customer
relationship management (CRM) software. ARC will provide licensing and access to the CRM on behalf of each contracted organization. ARC will maintain ownership and require access to all data points, such as employer names, contacts, notes and other items related to the TDM program. Additionally, a standardized commuter survey template and incentives will be provided by ARC and must be used by contracted TDM service providers.

A program survey to Employer Transportation Coordinators (ETC’s) will be conducted annually and results will be shared with the TMA and used in the annual review process as a gauge of performance. The survey will be conducted by ARC on behalf of the region and information will be used to validate relationships and partnership status. ETC contact information must be provided to ARC 30 days in advance of the survey deployment each contract year.

Interested organizations should submit a proposal that addresses the factors listed below and in the scope of services in Exhibit A. In addition, the contractor should provide a detailed breakdown of the proposed budget in the form of Exhibit B.

Only labor hours and approved overhead (see Exhibit C for approved overhead items) as specified below are permitted for reimbursement. These contracts will be for a two-year period, 2020-2021 calendar years. Budgets are required for year (1) - 2020 and year (2) - 2021. Any labor and accompanying overhead to be reimbursed must be demonstrably and directly related to education and outreach of regional TDM programs as established by the Atlanta Regional Commission.

**Labor Hours Eligible for Reimbursement**

1. Labor hours used by a staff member in support of this grant.
2. Labor hours by subcontracted staff labor.
3. Labor hours by temporary staff.
4. Labor hours used to directly provide employer education and public outreach for regional programs only.
5. Labor hours used to attend ARC mandated TDM meetings (contractors meeting, MPC, ad-hoc TDM meetings).
6. Labor hours used to directly conduct outreach to employers or property managers; including transit pass sales to employers.
7. Labor hours used to directly conduct outreach to employees within the specified areas.
8. Labor hours used to record and report required program measurement items as required by ARC.
9. Other labor hours as specifically requested or required by ARC.
10. Labor hours used to provide cost effective management of staff and other resources in the provision of all employer education and public outreach.
11. Labor for electronic marketing of regional programs.
12. Labor hours in support of local TDM ordinances as adopted in TMA territories.

Applicants interested in providing services described in this request must comply with the requirements described herein and requirements governing the use of CMAQ funds. All
Awardees are expected to:

1. Conduct employer and property manager outreach and education via on-site and pre-scheduled events/meetings, electronic media, webinars, etc. 
   Outreach and education efforts will be aimed at:
   a. Providing technical assistance to employers and property managers in the establishment of customized workplace and site specific TDM programs;
   b. Conducting employee outreach activities with employers or property managers to achieve SOV trip reduction utilizing the market data that is obtained through ARC and Employer surveys (fairs, meet your match events, carpool/vanpool formation meetings, webinars, learning sessions, electronic media, etc.).
2. Provide outreach to commuters on approved regional programs in such a way as to increase the number of people participating in carpools, regional vanpools, regional transit, biking, walking, telework programs, or alternative work schedules;
3. Submit employee ride-matching applications to the GCO ride-matching database as part of communication and outreach, when commuter shows qualified interest;
4. Increase the number of employees at partnering employers/property managers who participate in alternatives to driving alone as measured by on-site surveys required at employer sites;
5. Adhere to regional vanpool formation and participation guidelines as directed by SRTA;
6. Conduct specified follow-up with regional program registrants as directed by ARC;
7. Report activities, results, and programmatic outcomes by specific dates as requested by ARC;
8. Participate in annual programmatic and financial reviews as structured by ARC;
9. Ensure the accuracy of information related to each employer and property manager partner in the regional TDM CRM database, for the purpose of categorization in the internally-facing membership level system;
10. Conduct at least one standardized commuter survey at each membership level 3 and 4 employer partners within the contract period, providing clean commute percentage data to be used for programmatic impact analysis;
11. Highlight and track at least one way in which they are pushing innovative TDM efforts in their outreach territory; and
12. Participate in monthly contractor coordination meetings and other regional TDM meetings as required by ARC.

TDM programmatic efforts and outcomes will be evaluated using four criteria that reflect the
key stages of behavior change: awareness, influence, participation, and impact. The description and measurements that will be used for each of these four criteria, though subject to change, are as follows:

- **Awareness**: Commuter awareness of the regional and TMA-specific commute options programs.
  
  - **Measured by, but not limited to**: Total number of website sessions, unique website visitors, new website visitors, number of people on TMA-specific electronic mailing list, number of email campaigns, number of email recipients, email open rates, number of social media engagements, number of social media follower accounts, impressions for paid advertising, and third-party media coverage.

- **Influence**: Employer and property manager engagement with the regional and TMA-specific commute options programs.
  
  - **Measured by**: Employer and property manager partner movement up through the various internal membership levels.

- **Participation**: Commuter participation in the regional and local modal promotions and the GCO regional incentives program.
  
  - **Measured by**: Number of partners and commuters participating in modal promotions; and number of partners and commuters participating in regional incentives program, as represented in the GCO ride-matching database.

- **Impact**: Share of clean commuters at employer partner organizations.
  
  - **Measured by**: Shift in clean commute percentages as reported in the regional TDM CRM system.

Awardees will submit required reports to ARC utilizing the regional reporting system, provided by ARC. ARC will provide licensing, technical support and access to the CRM on behalf of each contracted organization. ARC will maintain ownership and require access to data (employer names, contacts, and other items related to the TDM program).

Organizations should respond to this RFP by submitting one (1) written proposal as well as an electronic version of the proposal in either Microsoft Word format or a PDF file. Electronic versions must be submitted on a compact disc or a USB flash drive along with the written proposal. The electronic file should be entitled: *TDM Employer Services Proposal*. Submissions must be received no later than 5:00PM on Monday, November 18, 2019. Proposals received after 5:00PM on the aforementioned date will be considered non-responsive and will not be evaluated. ARC reserves the right to award this contract based on initial proposals received without formal interviews and, further, reserves the right to award all or part of this project to
one or more firms. ARC anticipates awarding a contract(s) in December 2019.

Please send proposals to:

Atlanta Regional Commission  
ATTN: Bennett Foster  
229 Peachtree Street NE  
Suite 100  
Atlanta, Georgia 30303

It is the policy of ARC that Disadvantaged Business Enterprises (DBE) certified in accordance with 49 CFR Part 26 shall have equal opportunity to participate in the performance of the Commission’s contracts.

If your organization does not wish to propose on this project, please notify us as soon as possible. A negative response will not prejudice consideration of your organization in competition for future ARC contracts.

Proposals should be limited to a total of no more than 25 pages and should include the following information:

1. Proposed scope of work and technical approach in response to Exhibit A
2. Employer Services Proposal Cover Page (following Exhibit A-1 format)
3. Employer Services Budget (following Exhibit B format)
4. Employer Services Overhead Rate Components and Structure (included in Exhibit C format)

Proposals will be evaluated on the completeness of the above criteria and budget submittals related to the work as described in this RFP.

Additional information should not be required to respond to this RFP. However, technical questions may be submitted to Bennett Foster, in writing to be received no later than 5:00 PM on Thursday, October 31, 2019 at bfoster@atlantaregional.org or mailed to the address provided above. All questions and responses will be posted to the ARC website no later than Thursday, November 6, 2019.
EXHIBIT A

EMPLOYER SERVICES PROGRAM
PROPOSED SCOPE OF WORK

Services requested below are proposed to be provided to employers and commuters of the areas described on the Employer Services website (eso.atlantaregional.com). Respondents should specify the area(s) for which they are submitting a proposal. Also, respondents are encouraged to consider the characteristics of the area(s) for which they are submitting a proposal and tailor their responses to how these various characteristics should impact the implementation of the regional program in each area.

Additionally, each respondent is asked to conduct and provide a SWOT (Strength, Weakness, Opportunities and Threats) analysis for the defined area utilizing the Employer Services website and/or any other localized information available. Respondents should illustrate and apply the following when responding to each task:

1. Identify the strong alternative mode(s) in TMA defined area;
2. Identify the weak alternative mode(s) in TMA defined area;
3. Identify the opportunities in TMA defined area for greater alternative mode use; and
4. Identify the threats in TMA defined area that could impact current or future alternative mode usage.

In 2019, the Atlanta Regional Commission developed an Employer Engagement strategic approach document for the Georgia Commute Options program. Though it is not intended to be implemented solely in the TMA areas, respondents may reference this strategic approach document in formatting their responses to the tasks below (See Exhibit D for the Employer Engagement strategic approach document).

Task 1: Education and Outreach to Employers and Property Managers

Taking into consideration the required elements stated within this RFP, respondents should propose activities which clearly describe how SOV reduction will be achieved at employers and property managers. Below are the goals of this task and required activities that must be considered in achievement:

GOAL: At the beginning of the contract period, all employer and property manager partners will be categorized within a four-tiered membership level system, based on the presence of certain TDM activities at those employer or property manager sites. This membership level system is internally-facing only and subject to modification as needed. The four commitment levels are defined as follows:
1. **Starter Member**: Participates in ongoing education of employees through at least one of the following:
   a. Distributing commute options information through electronic means; and  
   b. Posting commute options information in common areas.

2. **Basic Member**: One or more of the following:
   a. Participates in regional and/or local modal promotions;  
   b. Promotes (encourages employees to participate in) the Georgia Commute Options regional incentives program; and  
   c. Allows the TMA to host on-site events.

3. **Intermediate Member**: At least one of the criteria from levels 1-2 in addition to one or more of the following:
   a. Offers clean commute tax benefits;  
   b. Works with the TMA to create a carpool or vanpool program; and  
   c. Offers employees discounted transit passes by purchasing through the TMA.

4. **Advanced Member**: At least one of the criteria from levels 1-3 in addition to one or more of the following:
   a. Offers a subsidy or financial incentive for clean commuting (any mode);  
   b. Matches GCO regional incentives with an employee-sponsored program;  
   c. Establishes a last-mile shuttle from nearby transit;  
   d. Implements a parking cash-out program;  
   e. Implements a company-wide formal FlexWork or Telework policy;  
   f. Installs on-site secured bike storage; and  
   g. Provides employees with shared bikes.

Over the course of the contract period, contractors are expected to move employer and property manager partners up through the membership level tiers, focusing their efforts on those partners who they determine to have the greatest capacity for mode shift

**a. Required Activity**: Hold a minimum of 10 direct interactions with employers and/or property managers quarterly for the purposes of creating customized commute options programs with the following strategies in mind:

   i. Maintain existing and establish new relationships and programs with employer and property management partners;
ii. Create new formal and informal telework and alternative schedule (compressed work week, and/or alternative work hours) agreements with employers;

iii. Educate employers on the regional incentives and modal programs;

iv. Educate employers on regional transit options; non-motorized modes such as walking, biking, teleworking and alternative work schedules; and regionally-funded commute options programs such as carpooling and vanpooling; and

v. Educate employers and property managers on local/regional construction projects that will impact commute times; offering alternative mode choices with the goal of long-lasting behavior change.

Task 2: Outreach to Employees/Commuters

Taking into consideration the required elements stated within this RFP, please describe the daily activities planned to provide outreach services to employees and others travelling to and within the geography of the described TMA area. Proposed activities must clearly describe how commuter outreach will result in achieving SOV reduction at employer and property manager sites. Below is the required activity and the strategies that must be considered in achievement of Task 2 and in support of the goal in Task 1:

a. **Required Activity:** Hold and report results of a minimum of 10 direct commuter interactions (commuter events) per quarter for the purposes of creating customized commute options programs with the following strategies in mind:

   i. Create new carpools and increased occupancy of existing carpools;

   ii. Educate commuters on local/regional construction projects that will impact commute times; offering alternative mode choices with the goal of long-lasting behavior change;

   iii. Assist vanpool vendors with creation of new vanpools and ridership maintenance of existing vanpools;

   iv. Increase transit ridership and maintain existing transit ridership through promotional activities;

   v. Increase use of non-motorized modes, such as bicycling, teleworking and walking;

   vi. Submit new qualified applications from those employees and/or commuters interested in ride-matching services and regional incentives programs each month to the GCO ride-matching database;

   vii. Educate qualified employees and/or commuters about the regional Guaranteed Ride Home program;
viii. Prepare, coordinate, and staff measurably successful outreach events quarterly; and

ix. Conduct and document follow up with program participants in the specific geography that have recently graduated from specified incentives programs and/or have not logged their trips in the regional rideshare database within the span of a month.

b. **Required Activity**: Report on marketing and communications activities that target commuters with the aim of increasing their awareness of regional and local commute options programs. This includes, but is not limited to:

   i. total number of website sessions;
   ii. unique website visitors;
   iii. new website visitors;
   iv. number of people on TMA-specific electronic mailing list;
   v. number of email campaigns;
   vi. number of email recipients;
   vii. email open rates;
   viii. number of social media engagements;
   ix. number of social media follower accounts;
   x. impressions for paid advertising; and
   xi. third-party media coverage.

**Task 3: Clean Commute Tracking & Reporting**

The goal of this task is to measure progress against SOV travel reduction goals. This will be accomplished through employer surveys conducted electronically or on site. Tools for achieving the below goal will be provided by ARC, including survey incentives and survey software. Respondents must briefly describe in no more than two paragraphs their planned approach to surveying the relevant employers in their territory. Below is the goal of this task and the required activity that must be considered in its achievement:

**Goal**: Within the two-year contract period, contractors are required to conduct at least one statistically significant, standardized commuter survey at all employer partners at the intermediate and advanced membership levels. Mode counts, as reported in the CRM system, will expire and be considered invalid 24 months after being reported, requiring an update during the contract period. For all intermediate and advanced employers, this update should be done in the form of a commuter survey. Because the results of these surveys will be used to analyze programmatic impacts over the contract period, it is recommended that they be conducted as close to the end of the contract cycle as possible.
All employer surveys conducted at intermediate and advance employer sites should achieve, at minimum, a response rate that meets statistical significance at a 90% confidence level with a +/- 10% confidence interval. For a survey to be extrapolated to the entire population at an employer site, it must be statistically significant at a 95% confidence level with a +/- 5% confidence interval.

a. **Required Activity**: Contractor must submit survey results through the Atlanta regional TDM CRM system.

**Task 4: Modal-based TDM Promotions**

The goal of this task is to reduce SOV travel through regional and local promotions that will increase the public awareness and use of alternative modes. The respondent should describe, in detail, their approach to encouraging the adoption of the clean commute modes listed below in a one time or continuous promotion. Promotions can consist of an existing regional campaign or the creation of a new approach to generating mode shift. Respondents must present at least three promotional concepts for this task but may substitute future regional programs once announced. The regional modal promotions tentatively planned for the 2020-2021 contract period are Try Transit and The Atlanta Bike Challenge. Additionally, respondents’ concepts must address how the promotion will work within in the context of the Georgia Commute Options program and the restrictions put forth in this RFP and subsequent contract, if selected.

Alternative Modes for consideration of modal promotions:

- Transit
- Carpool
- Vanpool
- Telework/ Alternative Work Arrangements
- Bike
- Walk

**Task 5: Innovative TDM Outreach Tracking**

The goal of this task is to highlight and track the innovative TDM efforts being undertaken by the TMA in their outreach territory. The respondent should select a minimum of one of the below listed innovative TDM efforts that they plan on undertaking during the two-year contract period. For each innovative TDM effort selected, the respondent should briefly describe the project and give an expected timeframe for its execution and completion.

- TDM outreach to residential market within the TMA territory.
- TDM outreach and service delivery to transportation disadvantaged communities that work and/or live within the TMA territory.
• Negotiating TDM plans and action with new commercial and/or multi-family developments within the TMA territory.
• Creating tailored workforce analyses and commute plans for engaged employer partners.
• Working on policies and ordinances that support TDM measures within the TMA territory.
• Other innovative TDM projects not mentioned above that result in a reduction of SOV trips (subject to approval).

Reporting on innovative TDM efforts would occur through a memo format on a quarterly and/or annual basis and regular data submissions through Salesforce. TMAs will self-assess progress and provide a narrative describing accomplishments and challenges encountered.

**Task 6: Program Administration**

This task shall consist of no more than 10 percent of total labor budget. The goal of this task is to provide the labor costs necessary for program oversight, staff training and professional development, financial accounting, reporting of results, and retention of documentation supporting execution of the work tasks in this contract. Proposed activities must clearly describe what will be achieved, how the activities will address each of the following requirements:

1. Monitor and report results in accordance with contract stipulations. All staff involved with reporting will be required to attend one training session that will include discussion on how to complete the reports;
2. Participate in annual programmatic and financial reviews;
3. Maintain a well-trained, knowledgeable, qualified staff to implement work tasks as proposed in this contract. Requires regional, annual training for all staff;
4. Maintain all documentation including e-mails, cost records, procurement documentation, invoices, audit trails, etc. and provide this documentation as required by this contract. All documentation associated with this effort must be retained by Awardee for seven (7) years; and
5. Notify ARC of any program reallocations, salary and employee changes, and/or overhead changes for reporting adjustments to employer services budget.
General Terms and Conditions

This program is contingent upon GDOT receiving CMAQ funds through the FHWA, and ARC receiving funds from GDOT. ARC reserves the right to reject any and all submittals, to withdraw this Request for Proposals, to withdraw from contract negotiations, and/or to re-issue this Request for Proposals at a later time.

The Applicant is required to have experience, skills and a level of knowledge of TDM issues in the area to be served. To maintain continuity with existing employer services efforts, the Applicant must have demonstrated, documented expertise in sales, marketing, outreach and educational efforts.
Date:

Name of Employer Services Organization:

Name of Contact Person:

Title and Organization:

Address/City/State/Zip:

Telephone:

Fax:

E-Mail:

Non-profit, DBE, or MBE designation:
## EXHIBIT B

### 2020 Employer Services Budget

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<th>TMA Name</th>
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<th>Results Tracking Reporting</th>
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**Total Costs**

- **ESO Share**: $0.00
- **Federal Share**: $0.00

**Staffing Subtotal**: $0.00
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## 2021
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Employer Engagement
A Strategic Approach to TDM Program Development in the Atlanta Region
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Introduction

Georgia Commute Options provides regional commuter programs to the 20-county district served by the Atlanta Regional Commission (ARC). Employers are critically important to the successful delivery of this work, offering two primary benefits: (1) they act as conduits, providing information and marketing materials to their employees, and (2) they can implement policy and infrastructure changes supportive of FlexWork, transit, carpooling, biking, and other non-drive-alone means of commuting. Property managers of commercial and residential buildings are also important entities, providing similar yet distinct benefits. For the sake of simplicity, employers and property managers are both referred to as “employers” throughout this document.

A strategic approach to employer engagement is essential to maximize the effectiveness and efficiency of Georgia Commute Options programs – and to ensure they are well-aligned to achieve relevant goals set forth by ARC. This means being deliberate about which employers to engage and the processes used to develop transportation demand management (TDM) programs at their worksites.

This document outlines the employer engagement strategy recommended for Georgia Commute Options (simply called the “strategy” throughout the remainder of this document). This is an update to the recommendations set forward in the Regional Employer Sales Guide, developed for ARC in 2016. Key lessons learned over the past two years utilizing that Guide are reflected in this updated strategy.

Two additional factors played key roles in formulating this updated strategy:

1. **Practitioner and stakeholder consultation.** Georgia Commute Options staff members participated in a series of group interviews where they provided feedback on the strengths and weaknesses of the 2017 Guide, based on their experiences working with employers in the field. Additionally, key ARC staff joined a half-day workshop to offer input on current ARC policy priorities and highlight emerging opportunities to engage employers in new, improved ways.

2. **The Regional TDM Program Alignment Performance Evaluation Framework and Action Plan.** This document, outlining a potential new framework for the measurement and evaluation of TDM programs in the Atlanta region, was developed along a similar timeline as this strategy (with the thinking behind each document helping to inform the other). Key elements of the plan include: (1) specification of three overarching goals for the regional TDM program, and (2) four priority performance measures that will be used to track progress toward the goals over time. In addition to the four priority measures, there are six additional measurements that ESOs can choose from to be further evaluated on. Direct linkages to these two concepts are articulated in more detail throughout this strategy.

The sections that follow begin with a summary of the overall strategy recommended for Georgia Commute Options, followed by a process flow chart illustrating the linkages between the three primary components of the strategy. These three components are detailed in the three subsequent sections.

It is important to note that the Georgia Commute Options program is complemented by a series of activity center-based Employer Service Organizations (ESOs), most of which are Transportation Management Associations (TMAs). While this guide is not specifically targeted for these organizations, they are an important part of the overall regional strategy and some concepts may be transferrable.
Strategy Overview

The overall intent of this strategy is to structure Georgia Commute Options’ employer engagement activities to maximize measurable progress toward ARC’s primary goals for the program. As outlined in the Regional TDM Program Alignment Performance Evaluation Framework and Action Plan (still under development at the time of this draft), these include:

1. Reduce single-occupant vehicle (SOV) travel
2. Keep the Atlanta region an attractive place to do business
3. Expand travel options, opportunity, and regional accessibility

Foundationally, this strategy is about both effectiveness and efficiency. It prioritizes employer engagement activities that have the best opportunity to achieve the three primary goals outlined above with the fewest program resources (in terms of human and financial resources).

The strategy includes four primary components:

1. **Invest in a robust pipeline of leads.** Engaging employers in TDM programs follows a path similar to a traditional “sales funnel” (see Figure 1), starting with a large number of organizations as initial contacts. Some portion of these initial contacts become potential “leads” through preliminary sales processes, and then some portion of these leads will consider and then adopt new commute programs at their workplaces, with TDM program development support. Conceptually, more employers identified as initial contacts means more employers as possible leads, and more leads then means more employers adopting TDM programs. As such, this strategy emphasizes investing in the early stages of this process, to develop a larger “pipeline of leads” (i.e., a larger number of employers at the beginning stages of the sales funnel).

2. **Cultivate employer relationships over time.** Very few employers move immediately from an initial sales contact to adoption of in-depth TDM programs. In many cases, employers choose to get started with basic informing materials. Their willingness to implement more robust programs may grow over time or shift in response to new problems faced at their worksite. As such, this strategy recommends new ways to include these employers just getting started as program “members”. In doing so, it acknowledges that employer programs often mature over time and recommends approaches to cultivate this growth.

3. **Prioritize support for employers with the largest impact opportunities.** Ultimately, employers implementing more robust TDM programs will produce the best opportunities to achieve ARC’s three primary goals for the Georgia Commute Options program. Given these three goals cover diverse topics, this strategy balances employer engagement priorities in two ways:
   - **Organizations with the most opportunity.** These primarily include employers with the best opportunity to produce travel behavior change (i.e., reduce SOV travel) among the...
largest number of employees. As such, this element of the strategy prioritizes large employers and/or employers located in areas with more viable travel options.

- **Organizations with the most need.** These primarily include employers that could most benefit from dedicated support and/or employers in areas or industries traditionally underserved by TDM programs. As such, this element of the strategy emphasizes support for these “distinctive employer sectors.”

The strategy is detailed in the sections that follow. The process flow chart on the following page depicts the entire strategy in one diagram, which is comprised of three main phases. In turn, these phases make up the three core sections of this document. They include:

- Phase 1: Employer Database Development
- Phase 2: Preliminary Sales
- Phase 3: Program Development
Phase 1: Employer Database Development

The initial phase of this strategy is to build a master employer contact database in order to create a substantial new pipeline of potential leads for subsequent employer sales efforts. Within this master employer contact database, leads should be prioritized to focus future employer sales activities on the employers who provide the most probable success of achieving the regional goals (based on the priorities outlined within the Regional TDM Program Alignment Performance Evaluation Framework and Action Plan).

PRIMARIES OF PHASE 1: Compile a robust master employer contact database; sort and prioritize employers within the database to align sales efforts to regional TDM priorities.

The key activities within Phase 1 include:

A. Compile a master employer contact database
B. Sort the database using four filters
C. Rank order the contacts within the “medium employers” cluster

A. Compile a master employer contact database
The first step is primarily a research and data gathering exercise, pulling from various data sources to build out a robust master employer contact database. Data sources could include, but are not limited to:

- Private business databases such as “Business Wise” and “AtoZDatabases”
- Property management databases such as “CoStar”
- Government resources and leads, potentially including lists of employers participating in other ARC programs
- Existing Georgia Commute Options employer lists (organizations that are not currently partners)
- Community Improvement Districts and Chambers of Commerce contacts

In this initial phase, database development should remain relatively streamlined, including data fields such as:

- Employer name
- Address
- Industry type
- Number of employees (by location)
- Contact information (where available)

Sourcing data that shows the number of employees per location will be important, as this is a critical element of the next data sorting step of this process. Additional research may be required for this data field (the use of rough estimates or ranges will be suitable).

B. Sort the database
The second step is to apply an initial sorting filter to the master employer contact database. This sorting should primarily be based on size (estimate of number of employees), supplemented by a parallel sorting criterion for “Distinctive Employer Sectors” (defined below).
1. Distinctive Employer Sectors
This cluster is best defined as organizations with unique opportunities to achieve ARC’s overall TDM program goals (as outlined in the Regional TDM Program Alignment Performance Evaluation Framework and Action Plan):

- Reduce SOV travel
- Keep the Atlanta Region an attractive place to do business
- Expand travel options, opportunity, and regional accessibility

Employers in this cluster may include specific industry sectors (e.g., manufacturing and warehousing), distinct employer-types and settings (e.g., colleges and universities), employers with multiple locations across the region, or others that may be defined over time as unique opportunities to develop successful employer TDM programs.

Organizations added to the Distinctive Employer Sectors cluster could also include those with unique challenges that are well-aligned to key ARC priorities; for example,

- Employers with distinct “access to jobs” challenges or local areas where employees with lower levels of private vehicle access face unusually challenging commutes.
- Locations with higher-levels of non-English speaking employees.
- Prime opportunities to advance wider regional transportation priorities (i.e., newly expanded infrastructure, emerging transportation technologies, etc.).

While the various priorities outlined above make this cluster unique, all employers included within this category should also have at least 100 employees in all but very special circumstances. Once identified, these employers will be included in the sales process moving forward.

2. Large Employers (500+)
This cluster should include the region’s largest employers, with more than 500 employees at a single location. These employers will be included in the sales process moving forward.

3. Medium Employers (100-499)
This third cluster should include medium-sized employers with 100-499 employees. This will likely represent the majority of organizations in the final master employer contact database. As such, this group should be further sorted and ranked (process outlined below).

4. Small Employers (<100)
This final cluster should capture any employers with fewer than 100 employees. While the majority of the region’s employers are likely of this size, they should not be a top priority for employer sales or TDM program development efforts. As such, they will still be included in the sales process with the primary goal of providing dedicated support materials for this size of organization, including the Georgia Commute Options Toolkit for Small Businesses (and the companion Quick Start Guide).
C. Rank Medium Employer contacts

The final step within Phase 1 is to rank order the employer contacts sorted into the Medium Employer cluster (those with 100-499 employees). Given that this should be the largest group of target employers, the intent of this step is simply to organize the contacts in a systematic order and provide a “place to start” for regional employer sales efforts.

Employers in this cluster should be ranked from higher to lower priority. Once these employers are identified, a mapping system should be used to overlay employer locations and a variety of other locational features to assign overall scores using the points-based system described below:

- **Proximity to Solutions (Maximum points: 5)**
  *Explanation:* The presence of local infrastructure and services for non-SOV travel enhances the range of TDM programs relevant for employers and their employees. Points include:

  - *Transit Access*
    1 point: Located within a 10-minute walk (1/2 mile) of at least one bus stop OR
    2 points: Located within a 10-minute walk (1/2 mile) of a rail station

  - *Multi-Passenger Access*
    2 points: Within three miles of managed lanes allowing carpool, vanpool, and commuter bus access

  - *Bike / Walk*
    1 point: Walk Score rating greater than 40. Walk Score is a tool that assigns a number between 0 and 100 that measures the walkability of any address based on access to nearby amenities. A score of 40 is the benchmark for a more walkable area in the Georgia Commute Options service area (e.g., Cumberland)

- **Proximity to Transportation Challenges (Maximum points: 3)**
  *Explanation:* The presence of local transportation challenges, such as heightened congestion levels and major construction projects, can strengthen employer interest in TDM programs. Points include:

  - *Congestion*
    1 point: Within one-mile of congested corridors (per INRIX Traffic Scorecard)

  - *Construction*
    2 points: Within one-mile of a major, ongoing road construction project

- **Employer Density (Maximum points: 1)**
  *Explanation:* Locations with a higher density of employers can facilitate more efficient on-the-ground employer sales processes (including where multiple medium-sized employers are located within a single building). Areas with high employment densities tend to feature more-supportive local environments for walking and bicycling and enhanced access to transportation services (e.g., transit services, dockless mobility options). Points include:

  - *Employer Density*
    1 point: Located within ARC-designated Regional Center, Region Employment Corridor, Region Core, or City Center
• **Employer Size and Brand Equity (Maximum points: 2)**

  *Explanation:* Within the medium-sized employer cluster, employer size (within the 100-499 employee range) remains a factor for program efficiency. Additionally, marque brands can become valuable assets for overall program credibility and visibility. Points include:

  **Number of Employees**
  1 point: 300-399 employees

  **Marque Brand**
  1 point: The employer is a Fortune 1000 company, or a prominent local public or non-profit organization

Overall, the points system outlined above is designed as a high-level mechanism to rank order the entities within the Medium Employer cluster. Sales efforts can then proceed sequentially based on rank order of the employers. *As such, it is not critical for the points scoring system to be precise.*

**Phase 1 Process Considerations**

As a final step, the specialty sector, large, and medium employers should be plotted on a regional map to illustrate the geographic distribution of these organizations. This can begin to inform possible designations of regional territories where applicable.

**PRIMARY OUTCOMES OF PHASE 1:**

1. A master employer contact database for the Atlanta region, organized into four clusters, with the Medium Employers prioritized.
2. A regional map of the specialty sector, large, and medium employers.

**Phase 2: Preliminary Sales**

The second phase of this strategy transitions from research-focused to sales-oriented activities. The master employer contact database developed in Phase 1 should provide a robust pipeline of employers. This phase initiates the process of converting these employers into potential candidates for TDM program implementation.

**PRIMARY AIMS OF PHASE 2:** Initiate contact with employers from the master contact database, introduce Georgia Commute Options, and gauge interest in becoming a Georgia Commute Options member.

- A secondary aim of Phase 2 is to continually enhance the master employer contact database (e.g., completing empty data fields, confirming existing data and contact information), even for employers that are not interested (at the time of contact).

The key activities within Phase 2 include:

A. Assigning “Sales Leads” for each of the four employer clusters (from Phase 1)
B. Contacting employer leads (initial and ongoing)
C. Determining outcomes from preliminary sales efforts
A. Assigning “Sales Leads” for each of the four employer clusters

Engaging employers in TDM programs often requires a blend of expertise; for example,

- Sales techniques and professional networking
- Transportation planning and TDM-solution design
- Industry- or sector-specific experience (e.g., warehouse and distribution businesses)
- Territory-specific knowledge (e.g., in-depth knowledge of a particular corridor)

“Sales Leads” should be responsible for the initial steps required to transition employers from the master contact database to potential candidates for Georgia Commute Options membership. Recruitment of these employers could require sales and transportation skill sets but could be implemented by one team member who possesses these multiple skills. This Sales Lead title represents the type of skill set that is needed at this particular point in the engagement process. To simplify the process as outlined below and in the process flowchart, the Sales Leads are written as distinct positions to clarify the specific skill set needed.

The table below summarizes the recommended Sales Leads for each of the four employer clusters, along with the geographic scale for their work.

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<td>#4 Small Employers</td>
<td>Automated Sales Processes</td>
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Further detail on the rationale for these roles within the preliminary sales phase is below:

- **#1 – Distinctive Employer Sectors.** These employers are likely to be atypical workplaces, requiring specialist knowledge of the industry or setting. Examples include warehouse and distribution facilities (with unique business priorities, employee shifts / schedules, employee turnover dynamics, etc.), colleges / universities, workplaces with majority non-English speaking populations, and more. In each case, Sales Leads can develop skillsets and knowledge specific to these sectors, and then apply these specialties regionally.

- **#2 – Large Employers.** Employers with 500+ employees are highly-valuable potential Georgia Commute Options members, due to the opportunities for efficiency gained by working with a large number of employees at one location, and the likely potential brand equity conferred by working with larger organizations. Sales efforts for these large employers should follow a more methodical, intensive process that may play out over a longer period of time (if required). Reaching key contacts within these employers may involve ongoing networking through local business groups, and solid knowledge of local commute challenges and opportunities. As such, preliminary sales should be handled by territory TDM specialists. The boundaries for these territories should be defined once all large employers (from the master employer contact database) are mapped and clustered.

- **#3 – Medium Employers.** This cluster should include the largest number of employers that are high-value targets for the Georgia Commute Options program. As such, dedicated preliminary sales efforts are warranted, utilizing staff members with strong sales and networking skills.
These sales specialists should work regionally. Once contacts express strong interest / need for Georgia Commute Options services, the contacts should be shifted to territory TDM specialists (a process described in more detail in Section C below).

- **#4 – Small Employers.** Employers with fewer than 100 employees are the lowest priority for dedicated employer engagement. As such, automated techniques should be the primary method of sales for this cluster, not one-on-one engagement. These could include group emails to existing small business contacts, presentations to small business networks, and other means of reaching these contacts efficiently.

**B. Contacting employer leads (initial and ongoing)**

The next step in the process involves initial engagement with the organizations in the master employer contact database. In some cases, this will require initial identification of the right contact at an employer.

This initial contact phase should utilize best practice “sales techniques.” For each of the four employer clusters, the table below provides examples for initial and ongoing engagement to better clarify the strategic intent of preliminary sales for each group.

<table>
<thead>
<tr>
<th>Employer Cluster</th>
<th>Initial Engagement Steps (examples only)</th>
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| **#1 Distinctive Employer Sectors** | • Intensive background research  
• Introduction through industry-specific associations  
• Introduction through industry-specific events  
• Introduction through Community Improvement Districts or Chambers of Commerce  
• Direct contact via email / phone, leading to in-person meetings  
• Use “Industry Guides” where available to inform discussions* |
| **#2 Large Employers**             | • Background research on each employer prior to first contact  
• Introduction through Community Improvement Districts or Chambers of Commerce  
• Introduction through property managers  
• Introduction through local business events  
• Direct contact via email / phone, leading to in-person meetings |
| **#3 Medium Employers**            | • Direct contact via email / phone  
• Introduction through regional events or business associations  
• Introduction through affiliated programs’ (e.g., “My Drop Counts”) business members  
• Use “Industry Guides” where available to inform discussions* |
| **#4 Small Employers**             | • Via group email to small employers with email contacts                                                |

*Georgia Commute Options is developing a series of two-page Industry Guides summarizing the unique workplace dynamics and TDM opportunities / challenges within specific industry groups. The first two examples include: (1) warehouse and distribution businesses, and (2) hospitals.*
An additional element of the preliminary sales activities will be to update relevant fields within the master employer contact database (e.g., completing empty data fields, confirming existing data and contact information). In this way, all sales activities serve to enhance the depth and quality of this database over time.

C. Determining outcomes from preliminary sales efforts
The primary outcome of Phase 2 should be to gauge “interest” in Georgia Commute Options programs and services. At the highest-level, this could include three general outcomes:

1. **Not interested**
   - Next step: These contacts will remain in the sales phase.

2. **Interested** only in receiving ongoing Georgia Commute Options information materials
   - Next step: These contacts will move to Phase 3 of this process as a “Starter Member” (full details on Georgia Commute Options membership levels is provided in the next section).

3. **Interested** in ongoing information materials as well as TDM program development support
   - Next step: These contacts will proceed to Phase 3.

As this is a critical decision point of the work completed in Phase 2, it is worth noting that the next steps based on each of these outcomes could vary somewhat for each of the four employer clusters, as described in more detail below:

- **#1 – Distinctive Employer Sectors**
  - Not interested: move on to other employers within the sector, returning to those not interested once successful case studies for employers in the sector are complete.
  - Interested (information only): transition to Starter Member.
  - Interested (TDM program development): transition to TDM Program Development, working with the same Sector TDM Specialist that led the sales process (plus additional experts as required).

- **#2 – Large Employers**
  - Not interested: continue engagement efforts with the employer, trying new methods and new contacts to develop enhanced interest over time (i.e., do not give up).
  - Interested (information only): transition to Starter Member.
  - Interested (TDM program development): transition to TDM Program Development, working with the same Territory TDM Specialist that led the sales process (plus additional experts as required).

- **#3 – Medium Employers**
  - Not interested: update database and move on to focus on other employers.
  - Interested (information only): transition to Starter Member.
  - Interested (TDM program development): transition to Territory TDM Specialist for the location of the employer to begin TDM program development.

- **#4 – Small Employers**
  - Not interested / no response: update database. As preliminary sales efforts for this cluster will be primarily automated efforts, receiving no response from a contact will be the most common way to gauge lack of interest.
  - Interested: send out the *Toolkit for Small Businesses* and transition to Starter Member.
Note: this Toolkit is an existing Georgia Commute Options resource designed as a self-help guide for smaller employers to select and launch their own commute programs. This Toolkit includes links to additional online Georgia Commute Options commuter services, such as ride-matching, incentives, etc.

Phase 3: TDM Program Development with Interested Employers

The final phase in this strategy is to further engage interested employers and transition them into Georgia Commute Options members. The purpose of an internal membership level structure is to guide the Georgia Commute Options staff towards providing a level of service to employers based on their level of commitment to commute programs at their worksites. In this model, employers are categorized by the level of resources (e.g., staff time, budget) that they dedicate to TDM programs. Sales Leads will need to assess the existing worksite and programming as well as determine opportunities for TDM programming at the employer to both propose specific TDM programs and to assign the employer to a membership level. Membership levels include:

- Starter Members: employers who have expressed some level of interest in GCO information materials
- Basic TDM Programs Members: employers who commit to more active Georgia Commute Options promotion within their companies
- Intermediate TDM Programs Members: employers who are providing tailored strategies to their employees
- Advanced TDM Programs Members: Employers who are providing a deeper level of commuter programs by investing more of their own internal resources.

These levels are further detailed in the following section.

PRIMARY AIM OF PHASE 3: Convert interested employers into Georgia Commute Options members

The key activities within Phase 3 include:
A. Determining TDM programming and resulting membership levels
B. Conducting evaluation

A. Determining TDM programming and resulting membership levels

Interested employers in the Distinctive Employer Sectors, Large Employer, and Medium Employer clusters will need to be assigned to a membership level. This may not happen until several points of contact have occurred.
Those who have expressed at least minimal interest in Georgia Commute Options, but are difficult to set up meetings with, will become Starter Members. For others, further work must be conducted by the Georgia Commute Options Sales Lead to identify the existing worksite conditions, as well as identify relevant programs for the employer. This work could include:

- Research on the company
- Conducting a site assessment
- Consultation meetings with the employer

From this work, the TDM specialist should then be able to provide an applicable program recommendation to the employer. Note, the interested employers are only converted to a Georgia Commute Options member upon implementation of a TDM program. If they only agree to accept information, they will remain a Starter Member. The magnitude of the types of TDM program(s) that are implemented will designate the membership level. The membership levels are as follows:

**Starter Member:** When Sales Leads initially contact employers, they may express a minimal level of interest in Georgia Commute Options. That provides an opportunity for Georgia Commute Options to keep them primarily engaged through electronic communications, while checking in periodically to determine if they are interested in a higher level of service delivery. There is a low commitment requirement from the employer within this membership level, and therefore we can anticipate a higher number of employers with this designation. To ensure that these members are effectively communicated with, an efficient digital communications strategy will be utilized. Employer actions within this membership level could include:

- Displaying a Georgia Commute Options poster in the employee breakroom
- Posting a direct link to Georgia Commute Options on the company intranet
- Receiving periodic updates from Georgia Commute Options

**Basic TDM Programs Member:** Employers who commit to more active Georgia Commute Options promotion within their companies, without opting to implement their own company-tailored programs are considered Basic members. These employers are interested in promoting Georgia Commute Options information materials to their employees, showcased by ongoing distribution of information. Employer actions within this membership level could include:

- Forwarding a Georgia Commute Options modal campaign to staff
- Inviting Georgia Commute Options staff to host a lunch and learn
- Promoting Georgia Commute Options incentives
- Communicating Guaranteed Ride Home enrollment requirements

**Intermediate TDM Programs Member:** Employers who build on the success of the Georgia Commute Options services by further providing specific strategies tailored to their employees are considered Intermediate members. These members will dedicate staff time and effort to developing commute solutions for their employees. Employer actions within this membership level could include:

- Implementing commuter tax benefits
- Working with Georgia Commute Options on a carpool or vanpool program
- Hosting specific campaigns for their employees (i.e. workplace commuter challenge)
• Offering an employee transit pass purchasing program
• Partnering with nearby retail to offer discounts for alternative commuters
• Supporting or applying for a Bicycle Friendly Business certification

Advanced TDM Programs Development Member: Employers who are providing a deeper level of commuter programs by investing more of their own internal resources are considered Advanced members. These programs either require a larger staff-time investment (i.e., cross-departmental initiatives) or a financial investment. Employer actions within this level could include:

• Establishing a last-mile shuttle from nearby transit
• Offering a transportation subsidy or financial incentives for not driving alone
• Implementing a parking cash-out program
• Implementing a company-wide, cross-departmental FlexWork or telework policy
• Installing site amenities such as a bike room or bike repair station
• Matching Georgia Commute Options incentives with an employer-sponsored program
• Providing “try-it” transit passes
• Incentivizing off-peak travel

B. Conducting evaluation

The actions within these membership levels would be evaluated by the performance measures identified in the Regional TDM Program Alignment Performance Evaluation Framework and Action Plan. Performance is measured against the TDM goals/objectives defined within the Atlanta Region’s Plan. Performance measures outlined in the Plan are classified according to key stages of behavior change:

<table>
<thead>
<tr>
<th>Georgia Commute Options Membership Levels</th>
<th>Starter</th>
<th>Basic</th>
<th>Intermediate</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness: Number of people receiving information on alternative commute options</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Influence: Increase in employer engagement</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Participation: Number of participants in Georgia Commute Options programming</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Impact: Clean commute trips per employer, per week</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

The membership categories are designed in such a way that there are opportunities for growth to the higher levels of membership. The goal within all levels is to increase employer engagement within that level, or to promote employers to the next level through program implementation.

Measuring the impact of TDM programming will primarily occur at Intermediate and Advanced levels through the use of workplace travel surveys. These surveys can serve two purposes:

1. **Baseline Evaluation.** Employer surveys can be used to assess baseline commuter behavior, confirm existing worksite conditions and assumptions made by the Sales Specialist, and determine potential uptake of recommended programs. Surveys should be reserved for
employers that are likely to follow through on implementation, and therefore would be only be used during the assessment phase if an employer is anticipated to be placed into the Intermediate or Advanced TDM Program Member levels. A baseline survey should also be undertaken before an employer is promoted to Intermediate.

2. **On-Going Evaluation.** Intermediate and Advanced TDM Programs Members will conduct workplace travel surveys every two years to ensure they are gathering data on their program impacts, including clean commute trips per employer, per week.

Both employer level and regional data will be used to determine how the effectiveness of engaging employers at the different levels impacts the outcomes, and to determine cost-benefit analyses of the various GCO programs offered. The results will inform future programming and regional policy decisions.

**PRIMARY OUTCOME OF PHASE 3:** A robust group of employers offering measurable TDM programs at their worksite

## Conclusion

Georgia Commute Options staff prioritizes working directly with employers as one of the methods to achieve the regional goals. Working directly with employers enables Georgia Commute Options staff to directly reach their employees, implement TDM programs at their worksites, and enhance the visibility of the program through a large network base of companies.

By increasing the number of employers within the membership program, there is a stronger foundation for the Georgia Commute Options brand. As more companies are exposed to the suite of services offered, the brand builds in credibility. This strategy focuses on quantity and quality of engaged employers. At any given time in the process, there should be more Starter Members than members within the higher membership levels. Implementation of in-depth TDM programming is focused on employers who are positioned to achieve ARC’s regional goals (as outlined in the *Regional TDM Program Alignment Plan*). By establishing a ranking system, Sales Lead time is focused on specific employers to usher them further through the sales funnel towards a higher level of impact.

This process should be supported by updated technology tools. Collection of data at the employer level will rely on inputs to the Salesforce tool. Functionality, workflows, and reporting fields should be updated to track progression through the membership levels and progress against the performance measures. Additionally, the regional ride-matching and incentive tool should be programmed to report the employee-specific measures outlined within the evaluation framework.

For the engagement strategy to be the most effective, the outcomes must connect to the *Regional TDM Program Alignment Performance Evaluation Framework and Action Plan*. The *Regional TDM Program Alignment Plan* will recommend staff performance reporting that would be provided to ARC. The performance reporting and the outcomes achieved by this engagement strategy should align in order to clarify the daily activities of Georgia Commute Options staff.