



Communications & Public Relations

511 Regional Rideshare Program and 511 General Marketing Standard Operating Procedures

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NOTE FOR PURPOSES OF PROCUREMENT SUPPORTING DOCUMENTATION:

This SOP reflects procedures for the Rideshare Program FY12-FY16 Scope of Work. Not all procedures will be applicable under future contracts. For example, these procedure include responsibilities for general 511 marketing and support of bicycling.511.org, which are not included in the January 2016 Industry Review Draft RFP.

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Staffing

Communications & Public Relations Manager

The Communications & Public Relations Manager supports the placement of commuters into carpools and vanpools, promotes the use of bicycling as a commute and recreational travel mode as well as coordinates efforts to increase use of non-drive-alone modes of travel through the 511 program.

Major Responsibilities

- Develop marketing and integration plans based upon the goals of the 511 Regional Rideshare Program and the MTC contract deliverables.
- Initiate new projects and programs designed to expand 511 services as well as public participation and knowledge.
- Review and stay current with all applicable market research regarding commuting habits, patterns and media. Continually scan the industry for best practices that can be adapted to reach target audience(s).
- In cooperation with the 511 Evaluation Manager, write questions for the annual client survey, employer surveys and other surveys, extract relevant information and apply data to the structure and delivery of 511 Rideshare marketing, messaging and incentive/behavior/modal change programs.
- Oversee the creation, implementation and coordination of marketing incentive/reward programs, including fulfillment and evaluation activities.
- Oversee the 511 Website content (Rideshare & Bicycling pages), implementing updates and interfacing with regional partners and sub-consultants as appropriate. Work with the 511 Project Manager, IT Manager, and Commuter Services Manager to identify and implement necessary technological applications to maintain and enhance the ridesharing Website within the 511.org Web portal.
- Serve as the media contact for 511 Rideshare & Bicycling, including initiating stories/news releases, while coordinating with MTC's Public Information Office (John Goodwin), fielding media inquiries, training and scheduling 511 Rideshare spokespersons, and conducting interviews.
- Coordinate and work with other MTC operation project managers including monthly update meetings.
- Work and coordinate with representatives of delegated county transportation organizations and congestion management agencies as well as attend marketing working group meetings of the RRP TAC.
- Manage the 511 Rideshare marketing budget, including managing sub-consultants/vendors, professional services, direct expenses and staff.
- Manage a consistent 511 brand identity program including advertising/promotional campaigns, public and community relations campaigns, program sponsorships, and incentives.
- Supervise the marketing staff members in all described tasks and responsibilities.



- Manage 511 Facebook Wall posts, Instagram photos, and coordinate Twitter tweets during transportation emergencies and events (when approved by MTC).
- Oversee style, writing and graphic support, production and delivery of 511 advertising campaigns as well as outreach materials for Employer Services, Commuter Services and Vanpool Services Departments.
- Other duties as assigned.

Senior Creative Associate

Major Responsibilities

The 511 Creative Associate (Creative Associate) supports the Communications and Public Relations Manager in general marketing and communications activities, promoting 511 in the San Francisco Bay Area and focusing on the following goals:

- Develop and coordinate communications plans and goals of 511 and 511 Rideshare and Bicycling Program and client contract deliverables. Coordinate new projects, tasks and programs designed to support marketing efforts of 511 in the San Francisco Bay Area as well as support marketing efforts of the 511 Rideshare and Bicycling Program.
- Develop marketing campaigns for general 511 features and services including 511 Traffic, 511 Transit, 511 Parking, 511 Real-Time Departures and other 511 services and features.
- Plan, develop and help manage the implementation of marketing and rewards programs for 511 Rideshare that encourage and influence behavior changes to carpooling, vanpooling and other forms of alternate travel behavior.
- Research and develop campaigns to help the 511 outreach team continue and expand business and employer relationships to expand transportation demand management (TDM) programs in the nine county Bay Area.
- Work with Employer and Vanpool Services to identify target markets and strategies for all services offered by these departments. Distribute regional promotional and campaign information to delegated county representatives.
- Communicate 511 Bicycling services and events in a persuasive and useful way resulting in commute-travel mode change.
- Assist with the strategic development, evaluation and operations of 511 marketing campaigns by researching and implementing new technologies that improve e-mail and online marketing programs, as well as provide data analysis to evaluate and improve marketing programs.
- Devise and implement social media strategies. Maintain engaging and timely content on social media sites as needed and as requested by client. Ensure coordinated and consistent messaging across all social media opportunities. And, provide back up support to social media applications.
- Develop ideas for outreach marketing projects, develop timelines that coordinate and support campaigns, and ensure that event coordinator and or event staff has promotional materials and tools.
- Function as secondary client liaison to 511 Communications Manager as needed. Support the coordination of communication with client contacts, program departments and partner agencies.



- Report on and evaluate all marketing efforts.
- Other duties as assigned.

Production Associate

Major Responsibilities

The 511 Production Associate (Production Associate) supports the Communications and Public Relations Manager in general marketing and communications activities, with the following goals:

- Support the 511 communications team to meet client expectations for accurate and error-free messaging and materials that broaden awareness of the 511 traveler information service.
- Assist in the trafficking of advertising and materials production. Maintain production schedule for general 511 and 511 Rideshare advertising campaigns, materials and collateral.
- Assist and support branding consistency as established by MTC and quality in all 511 materials. Monitor marketing materials, campaigns and collateral for branding, logo and color consistency.
- Oversee, support and modify/develop proofing and quality control processes of communications and promotional materials produced by the 511 RRP team and its subcontractors and vendors.
- Function as administrative support for accounts payable and processing of marketing vendor estimates and invoices.
- Provide copywriting and proofing for advertising, web content and outreach support materials and documents. Revise and update technical transportation writing and information to consumers and/or business documents.
- Monitor communications department priorities list, calendar of department tasks, and report project status to management.
- Function as department POC for project status updates. Oversee scheduling and production deadlines to meet internal and external client requests.
- Support the coordination of communication with client contacts, program departments and partner agencies.
- Support the launch of new 511 features, services and tools as assigned.
- Support development and implementation methods of communicating 511 Rideshare-related opportunities to employers, commuters, and others.
- Research and develop marketing materials to support the employer and worksite outreach for the Commuter Services and Vanpool Services Departments as assigned.
- Other duties as assigned.

Marketing Graphic Designer

Major Responsibilities

Assist the Communications & Public Relations team in all tasks related to graphic design, production and communications for 511 Rideshare, including but not limited to:



- Design & produce marketing collateral including case studies, white papers, how tos, brochures, web ads, street banners, reports, newsletters, swag, transit ads, billboards and other promotional materials.
- Create visuals for the 511 Rideshare and Express Lane websites, social media channels, email, promotions, and campaigns
- Interact with team to develop visuals to assist with explaining concepts
 - Interface with contract designer(s) regarding price and design or edit changes requested by team members.
 - Maintain marketing and design files.
 - Obtain competing bids from printers and various vendors for specific collateral and materials.
 - Manage incentive fulfillment and maintain inventory of all in-house incentives/prizes.
 - Support public information efforts as needed.
 - Work with Employer Services, Commuter Services and Vanpool Services on collateral production, support materials, and other communication support.
 - Other duties as assigned.
- Perform updates to 511 Carpool, Vanpool and Bicycling, MTC Express Lanes and Bay Area Express Lanes service content of website, including HOV policies, tolls and violations, commute hours, classes, volunteer opportunities and announcements.



Communications/Marketing Team Responsibilities

- Manage department costs and yearly budgets Marketing Plan and Development
- Develop an annual marketing plan and budget for 511 Rideshare (task 3B.1), and a plan and budget for General 511 Marketing (task 3B.2) as requested.
- Develop and write an annual fiscal marketing outline for 511 Rideshare including:
 - Annual project and contractual goals, publicity targets, media strategies and marketing programs.
 - Strategies and tactics are tied to annual goals using best practices and market research from the annual survey.
 - Program and plan for marketing expenditures of advertising, collateral, production, and media services.
 - Goals of the plan will be co-developed by Project Manager, Operations Manager and appropriate MTC representatives.
 - Outlines and campaign proposals will be kept in R:\Marketing.
- Plan and discuss marketing ideas with the client, internally and with media/marketing consultants, on a regular basis.
- Review and summarize projects and effectiveness in reaching project goals.
- Explore new avenues to maximize and leverage media and budget.
- Review and explore other rideshare programs that could be adapted to the Bay Area.

Reports for MTC

- Provide a weekly spreadsheet of priorities for the following week each Friday afternoon to the client's 511 marketing contact, Alysha Nachtigall (ANachtigall@mtc.ca.gov).
- Write marketing section of quarterly reports for the Evaluation Manager. These updates are sent to the BAAQMD and other stakeholders.
- Write monthly marketing inputs including a news clip report/summary (3B.1 and 3B.2 Renewable Services inputs). These inputs are then added to the monthly Progress Report.
- Write other marketing/media based reports and summaries as requested by MTC.

Website Maintenance / Coordination – Rideshare and Bicycling Pages

- Continually monitor/review the website for accuracy, missing links, dated material and appropriate content.
- Re-write, edit, update and simplify content when necessary.
- Adjust and edit per MTC requests.
- Posted documents and web page edits are coordinated through PB ProjectVis and Jon Eastlund, IT Manager.
 - Media Beef Commuter Benefits contact is Michael Henry (mike@mediabeef.com).



- Communications staff is responsible for providing updates to PB ProjectVis staff. PB ProjectVis is responsible for making edits to the HTML pages of <http://rideshare.511.org/> and <http://bicycling.511.org/> as well as confirming edits and changes have been completed with 511 RRP communications staff.
- PB ProjectVis can accommodate any website edits, programming, design, graphics and functional changes. If needed, edits can be made on weekends and holidays with advance notice and confirmation of ProjectVis' staffing availability.
- 511 Rideshare staff and PB ProjectVis staff work within the page templates per the 511 Style Guide or as requested by MTC.

Media / Media Relations

News Releases and Advisories

- Draft news releases as needed. 511 enhancements/accomplishments to go out on 511 letterhead.
 - Submit internally and to MTC for review:
 - Initial submission is directed to the respective MTC project manager and/or Alysha Nachtigall for review, edits and circulation.
 - 511 executive/staff quotes in releases will be approved through Alysha Nachtigall or the respective 511 project manager.
 - Once an MTC project manager(s) has returned a news release draft, review and make corrections and submit to John Goodwin (jgoodwin@mtc.ca.gov) for circulation and approval by MTC's public information team.
 - Commissioner quotes used in releases will be approved via John Goodwin.
 - Allow approximately three days for MTC review.
 - Final review and distribution of news releases will be coordinated by John Goodwin through Georgia Lambert (MTC's PIO team).
 - Distribute a brief summary and PDF version of news releases to appropriate transportation, business, general or regionally-specific reporters/bloggers via e-mail.
 - Distribute news releases through MTC's PIO (Georgia Lambert).
 - Secondary alternate options, if approved by MTC public information staff:
 - Distribute through PRNewswire, PRWeb and/or in-house list.
- With MTC PIO approval, pitch reporters by phone/e-mail. Contact reporters and assignment editors one week in advance of any event. Follow-up with two-hour notice to assignment editors.
- Keep county partners informed of media releases and media events.
- Follow up all media interaction/interviews/conversations with event summary e-mail to the following (Media Activity Summary List): Shauna Callow, Melanie Crotty, Brooke Fotheringham, John Goodwin, Pierce Gould, Barbara Laursen, Alysha Nachtigall, Randy Rentschler, and Lauren Isaac.
 - Example event summary e-mail includes:
 - Publication / Network / Media: --



- Story Date: --
 - Journalist(s): --
 - Contact Date(s) and Follow-up: --
 - Story/Conversation Detail(s): --
 - Highlights / Talking Point(s): --
 - Result(s) / Outcome: --
- Upon approval of MTC PIO, pitch reporters on news releases and events with personal phone calls.
 - Continually update in-house media list with other sources.
 - Read MTC news headlines every day.
 - Respond to breaking news when relevant.
 - Respond immediately to any reporter's query, send background information, and refer to other experts.

Media Events / News Conferences

- Draft talking points for event speakers/guests/staff/clients.
- Brief and train appropriate people on talking points.
- Determine location(s) and confirm venue for media event.
- Create visuals and media packets with event-specific information and 511 Rideshare facts and details.
- Distribute hard copies at events and distribute soft copy via e-mail PRNewswire.
- Schedule events appropriate to media coverage.
- Collect reporter contact info and update internal media list.
- Communications & Public Relations Manager's media outreach – such as lunches, invitations to media events, and distribution of background materials – should be ongoing.

Social Media

- PB/511 Communications team is responsible for managing and maintaining the 511 Facebook page: facebook.com/511SFBay.
- PB/511 Communications team is responsible for managing and maintaining the 511 Instagram page: instagram.com/511SFBay.
- PB/511 Communications team will update page/timeline posts and materials, and respond to inquiries in a timely manner appropriate for social media. Response will occur within 24 hours or less, excluding weekends and holidays.
- Update and inform MTC contacts as needed with Facebook inquiries that cannot be answered by PB staff. Such topics may include data, traffic, transit, funding or policies.
- Post weekly to 511 Facebook page: facebook.com/511SFBay.
 - Post information about 511 tools and features.
 - Post about events and promotions going on for 511 Rideshare.



- Post content relevant to 511 that is engaging and/or informative.
- Update and monitor 511 Facebook page. Updates/wall posts should occur a minimum of twice weekly.
- 511 Rideshare has administrative rights to 511 Facebook page
- Post/update Facebook advertising as needed.
- Post to Instagram according to the Instagram Plan guidelines.
- Social media advertising campaigns will be drafted and approved through 511/MTC program managers. A budget and advertising dates will be approved by MTC in advance. 511 RRP staff will post and coordinate social media advertising. Payment for the advertising will utilize the project PB purchasing card. Keep a cache of pictures in the 511 Instagram folder on Google Drive.
- Tweet 511 Rideshare messages through Twitter or Twitter third-party software such as HootSuite.
- Provide HootSuite account administrative support as needed to MTC and TIC contacts.
- Twitter procedures during transportation emergencies and or special situations:
 - Upon request and approval of 511/MTC program staff, PB staff will directly draft and post tweets to the 511 Titter account.
 - Messaging, hashtags and frequency will be assigned and approved by 511/MTC program staff in advance.
 - PB staff will record tweets and provide Twitter stats as requested upon conclusion or termination of the situation or event.
 - Documentation of both Facebook posts and tweets may be to specific Google or shared documents as assigned by MTC program staff.
- Monitor Google alerts, MTC library alerts for 511, 511 Rideshare, carpool/vanpool and appropriate promotional campaign or programs.
- Provide back-up tweet services in the event of any TIC technical issues with systems or problems with Twitter access.
- Monitor transportation blogs and respond/post when appropriate (approve response with MTC).
- Work with MTC's social media working/coordination group. Brooke Fotheringham is the POC for 511 social media. Questions and follow-up documentation are to be sent to Brooke with a cc to Alysha Nachtigall.

Media Requests / Media Inquiries / Interviews

- Respond immediately to media calls.
- Confirm reporter's deadline.
- Direct inquiries as needed to John Goodwin, 510-817-5862, jgoodwin@mtc.ca.gov or Randy Rentschler if John Goodwin is not available.
- Prepare in advance. Gather all facts and related news articles.
- Respond to all statistical inquiries in writing (when time permits).



- Pre-screen all potential interview participants for talking points and comfort-level with media and public speaking.
- When stories/events warrant statements from someone aside from MTC PIO or communications manager, the communications manager must “media train” staff, invited guests, and rideshare participants:
 - Hone talking points.
 - Rehearse major points and sub-points.
 - Speak concisely.
- Follow-up with brief written summary to Media Activity Summary List (see news releases/advisories).

News Clipping, Monitoring and Evaluation

- Track coverage and keep copies of news clippings with BurrellesLuce.
- Circulate important stories to 511 Rideshare managers and Commuter Services Department.

Research

- Research trends in online marketing, broadcast, print and outdoor advertising.
- Identify media opportunities and saleable story ideas for the calendar year and include in marketing strategic plan.
- Maintain files of relevant local, regional and national news articles.
- Collect and monitor applicable information as available from TDM listserv, MTC headlines, ACT, 511 reports, Rideshare Urchin reports, and “Rideshare Rewards” database, etc.
- Stay current with TDM research from ACT, National Center for Transit Research/CUTR and other sources. Apply best practices, applicable secondary- and tertiary-research data, and industry standards as appropriate to program marketing.

Street Banners

- 511 street banners are utilized as a long-term communications material in the following cities/locations: San Francisco, Berkeley, Oakland, Rio Vista, El Cerrito and Hacienda Business Park.
- Street banners in San Francisco, Oakland and Berkeley require permits filed and paid for in advance before banners are displayed.
- Permits are filed and paid for through the vendor AAA Flag & Banner. AAA Flag & Banner also prints, installs and stores banners.
- San Francisco street banners are permitted through three resources: SF Department of Public Works, SF Department of Public Works /Caltrans, and the Port of San Francisco.
- Banner inventory and display must be renewed each year. SF Department of Public Works /Caltrans and Port of San Francisco reservations and must be done well in advance and are subject to availability and competing advertisers.



Production: Web / Broadcast / Print / Collateral

- Develop marketing materials that adhere to and maintain the 511 Style Guide.
- Review final designs with MTC (and applicable corporate sponsors).
- Submit samples of all collateral to MTC to ensure compliance with BAAQMD and other fund-source requirements.
- Develop flyers, brochures, posters, e-mail, e-newsletters, fact sheets, and sales sheets, etc.
- Coordinate marketing efforts with MTC on the promotion of other 511 tools, services and programs (e.g., Transit Trip planner, 511 widgets, 511 mobile and apps).
- Develop radio script concepts and traffic sponsorships internally or with ad agency.
- Develop radio spots and campaigns when needed. Need is based upon goals, effectiveness, target audience, past successes and budgetary guidelines.
- Submit a Media Authorization Form for signature.
- Submit final creative scripts, ads and storyboards to MTC as appropriate for review.
- Allow approximately one week for MTC review.
- Integrate and utilize social media (Facebook/Twitter) for campaigns/promotions.
- In-house materials:
 - Determine quantity, budget, production, and approval timeline.
 - Maintain and adhere to 511 Brand Guidelines.
 - Determine in-house or external production requirements.
 - External production resources include:
 - In-house 511 team
 - PB staff
 - Freelance artists and writers
 - Circulate drafts to requesting staff members with cc: to managers as appropriate.
 - Forward final drafts of all materials to MTC for review and approval.
 - Work with Barbara Laurenson to determine who at MTC needs to approve materials/documents. Circulate to appropriate people with cc: to Barbara Laurenson.
- Subconsultant support: Convey, 29 Rosemont Avenue, Berkeley, CA 94708-1250, Sybil Hatch, PE, 510-558-8825, s.hatch@conveyinc.com.
- Materials scope and production. Campaign and material production will depend on complexity of media and scope of campaign. Simple flyers or graphics can be produced in house or through a freelance designer. More complex campaigns that involve mixed and various media (e.g., billboards, broadcast, transit, and out-of-home, etc.) will be produced by Convey. In special circumstances, Gumás will be consulted when Convey cannot produce requested or specialty materials.

Collateral Materials: Distribution / Filing / Library Maintenance

- Collateral materials, including event/worksite giveaways, must have some post-consumer recycled content or be biodegradable. This includes paper, plastic, metal, fiberboard and



other construction materials. All materials should be labeled appropriately/correctly with recycled content.

- When collateral material has sufficient printing/display space, the following logos must appear: 511 and/or 511 Rideshare, MTC and BAAQMD. Whenever MTC and BAAQMD logos are used on collateral, a product proof must be approved by appropriate MTC staff.
- Communications & Public Relations Manager and Marketing Graphic Designer (in conjunction with IT Manager) will maintain working online/server library of softcopies (PDFs) of all appropriate 511 Rideshare collaterals.
- Marketing staff will periodically review all 511 Rideshare materials for appropriate updates and edits.

Incentive and Promotional Campaigns

- Stay current on national TDM campaigns through TDM ListServ, and ACT, etc.
- Participate and lead development of regional marketing program(s) and review internally with partners and MTC.
- Incentive text is provided to CSD and ESRs for posting on the 511 RideMatch Service log-in and individual account pages.
- Evaluate programs by reviewing number of participants, vehicle miles reduced, emissions reduced, cost per person placed, and satisfaction levels with calculation assistance from Evaluation Manager.
- Keep a file of partner and corporate logos for co-op campaigns:
- Coordinate regional campaigns with county partners and MTC Marketing Working Group.
- Subconsultant Support: Kimbrell & Company, 200 Gate 5 Road, Sausalito, CA 94965, Diana Kimbrell, 415-331-1334, Diana@kimbrell-co.com.

Private Sector Ridematching Applications

Coordinate and administer the MTC Contributions listed in MTC's Private Sector Ridematching Application agreements as directed by Barbara Laursen. Log contributions as they are provided.

Vendor Use and Management

- Continually compare and contrast production vendors for best price and quality. Ensure that all distributed materials contain some post-consumer content. UDBEs should be given fair consideration when searching for and seeking marketing services, materials and supplies.



Promotions

511 Rideshare implements three types of promotion programs: Green Commute, Carpool/Vanpool Promotions, and Employer Promotions.

Green Commute Promotions

The Green Commute promotion is a rewards program for those who use alternative transportation rather than single occupancy vehicles. This promotion has two sets of terms & conditions: standard and special depending on the rewards we secure through our contacts.

Standard

The standard Green Commute rewards promotion awards ten (10) \$5 Peet's Coffee & Tea gift cards to newly- and currently-registered carpoolers who complete a commute log that includes a minimum of **one (1)** day of either carpooling, vanpooling, walking, bicycling, using transit, or telecommuting to work each **month**.

Special

Special Green Commute promotions have a valuable prize from a sponsor who has partnered with 511 (e.g. Mike's Bikes, Walt Disney Family Museum, Tech Museum of Innovation, etc.). The special Green Commute promotion rewards newly- and currently-registered commuters who complete a commute log that includes a minimum of fifteen (15) trips of either carpooling, vanpooling, walking, bicycling, using transit or telecommuting to work each month of the promotion.

Carpooling Promotions

511's carpool promotion has two sets of terms & conditions: Standard and Special. When the Vanpool Department runs a promotion, it falls in the category of Carpool Special Promotion.

Standard

The standard carpool promotions have a valuable prize from a donor who has partnered with 511. The standard carpool promotion rewards newly- and currently-registered commuters who complete a commute log that includes a minimum of **fifteen (15) trips** of carpooling to work each **month** of the promotion.

Special

Special carpool promotions are planned in advance and eligibility/terms and prizes will vary. The primary focus of these campaigns is to get new users in the database through outreach, email marketing and self-registration.

Employer Promotion

Employer promotions are promotions initiated by an employer and generally come in the form of a one-time request from the employer services department.



Operations

Green Commute Standard Promotion

The Green Commute standard promotion is the default promotion that runs when there is no special promotion. When special promotions are over, the marketing team reinstates this promotion. No communications accompany this promotion.

Green Commute Standard Promotion Materials	Y	N
Employer email		X
Delegated county email	X	
Promotion training session		X
Promotion instructions/Terms & Conditions	X	
Poster		X
RMS eblast	X	
Suggested Facebook Posts for MTC PIO Partners	X	
Promotion Page Update	X	
Update Promotion Schedule	X	

Green Commute Special Promotion

Special Green Commute promotions vary based on the prize and the donating company/agency. The terms and conditions are based on the standard terms and conditions, but may have some special requirements based on requests from the prize donor. The Marketing team will provide the CSD and ESR teams with the following materials 15 days prior to the launch:

Green Commute Special Promotion Materials	Y	N
Employer email	X	
Delegated county email		
Promotion training session		X
Promotion instructions/Terms & Conditions	X	
Poster	X	
RMS eblast		X
Suggested Facebook Posts for MTC PIO Partners		X
Promotion Page Update	X	
Update Promotion Schedule	X	



Carpooling Standard Promotion

Carpool standard promotions are variable based on the prize and the donating company/agency. The terms and conditions are based on the standard terms and conditions, but may have some special requirements based on requests from the prize donor. The Marketing team will provide the CSD and ESR teams with the following materials 15 days prior to the launch:

Materials to Expect	Y	N
Employer email	X	
Delegated county email		
Promotion training session		X
Promotion instructions/Terms & Conditions	X	
Poster	X	
RMS eblast	X	
Suggested Facebook Posts for MTC PIO Partners		X
Promotion Page Update	X	
Update Promotion Schedule	X	

Carpool/Vanpool Special Promotion

Carpool/Vanpool special promotions are designed to bring in new registrants/riders and therefore involve a full-scale outreach component. The terms and conditions are based on the standard terms and conditions, but may have some special requirements based on requests from the donating company/agency or the nature of the prize. Public facing staff can expect two or more participatory trainings to prepare for proper articulation of the special promotions. The Marketing team will alert the CSD and ESR teams of an upcoming promotion 2 months in advance of the launch, and provide the team with materials at least 15 days prior.

Carpool/Vanpool Special Promotion Materials	Y	N
Employer email	X	
Delegated county email		
Promotion training session	X	
Promotion instructions/Terms & Conditions	X	
Poster	X	
RMS eblast	X	
Suggested Facebook Posts for MTC PIO Partners	X	
Promotion Page Update	X	
Update Promotion Schedule	X	



Employer Promotion

Employer promotions are promotions initiated by an employer and generally come in the form of a one-time request from employer services. Any sort of new promotional materials (poster, flyers, eblasts, promo boxes, promo page, and/or other designs) requests require at least two weeks' notice. Notice of the promotion should be sent to Julie Vuong with a cc: to Kit Powis, Nora Dowley and Rachel Zack via email. Email should include:

- Date of promotion
- Duration
- Prize information (what are the winners winning)
- Employer information (custom site url, logo in .ai or .eps form, contact info)
- What is the promotion? (What do you have to do to win?)
- Name of promotion and call to action if possible
- Any logo art the employer wants displayed

The first draft of materials will be complete within one week. Final materials will be sent within two weeks. Any notice sent without all required information will delay the process. If or when a promotion requires all of the above materials, a month's notice would be ideal. When all basic information is obtained, Julie will send an email to the CSD outlining the following details:

- Date of promotion
- Overview of contents and communication involved
- A contact to forward any incoming questions to

Feedback to Sponsor

After each promotion, the following should be sent to Diana Kimbrell at diana@kimbrell-co.com:

Item	Format
Promo Boxes (ND)	Screen shot
551sfbay Facebook Post(s) (AS)	Screen shot
MTC PIO Facebook Post(s) (AS)	Screen shot
MTC PIO Twitter Post(s) (AS)	Screen shot
Print Promotions (AS)	PDF

Rideshare Promotions Calendar & Sponsor Pursuits

Calendar

The Marketing team will send out a monthly calendar via email with the upcoming promotions.



Incentives and Fulfillment

One of the features of the 511 RideMatch Service is tracking and incentivizing commuters' via their travel choices. Rideshare registrants may track daily commuting trips and log the miles and modes of transportation. Regional incentives are currently listed on most 511 RideMatch Service log-in pages, and featured in the incentives window when a 511 RideMatch Service user is logged in to his/her account.

Incentives

Incentives currently reward people for carpooling to work. Giveaways and incentives have included Ghirardelli Chocolate Festival tickets, Peet's Coffee & Tea gift cards / coupons / merchandise, Beach Blanket Babylon tickets, and other items from sponsors.

- **Eligibility and Prize Details** Eligibility and details will vary depending on promotion goals and objectives. All incentive programs will be designed to change transportation/commute behavior, increase the profile of 511 Rideshare services, and encourage sustainable transportation choices to residents of the 511 service area.
- **Participation Guidelines/Requirements** Eligibility and details will vary depending on promotion goals and objectives.
- **Promotion Duration** Eligibility and details will vary depending on promotion goals and objectives.
- **Fulfillment Schedule** Currently fulfillment is coordinated once per month for reward/incentive programs.
- **Customer Service Info** FAQs, contact information, phone and e-mail assistance/response.

Fulfillment Process

1. A report is generated from the 511 RMS administrative page under the "Promotions" report section. The report lists all active trip diaries and entries for a 14-day period prior to the fulfillment week. (AS/KP)¹ [Back-up reports may be secured from Media Beef if technical difficulties arise with 511 RideMatch Service reporting module.]
2. The Administrative Lead reviews the report and verifies eligible recipients for the incentive period. Eligibility is based on promotional guidelines listed above. (AS/KP)
 3. Incentives are locked in the Marketing Graphic Designer's cabinet and documented in the incentive inventory.
4. Winners of prizes with date restrictions are informed via email or a phone call as well as in writing. Letters/incentives are mailed via US Postal Service. (AS)
5. All winners of substantial prizes (\$100+) are provided a prize acknowledgement form verifying name, address and prize amount. The form also gives permission to 511 and its agents to use winners' names in promotional announcements online, in print or in broadcast media. Winners must sign and return the form before gift cards/rewards are mailed from the 511 RRP.

¹ (Amy Saeyeng/Kit Powis)
(Marketing Communications Associate/Communications & Public Relations Manager)



6. Summary of incentive period/promotion and a 12-month activity graph is included in monthly renewable services report. (ND)
7. Reward numbers are sent monthly to Helise Cohn and Gina Arias for inclusion in the monthly 511 RRP Report Card to the client. (ND)
8. Delegated county representatives will be informed of 511 RRP incentive/reward winners in Contra Costa, Napa, San Francisco and Solano Counties via an e-mail summary. (ND)
9. Online incentives/rewards information is updated monthly using the 511 RideMatch Service Administration. (JV)

Mass Email

Template Development

- 70 Washington Street address is allowed.
- Only allowable phone number is (510) 273-3600.
- Use only the standard logo(s) and call to action.
- Remove any Pinterest symbols and link the Facebook, Instagram and Twitter symbols to proper addresses.

Email Development

- When RMS is involved, get current distribution list from the IT Manager.
- Set reply address to a forwarding email on this [list](#) that is connected to Communications staff only, e.g. ridesharepromo@511.org. Replies should not go to the CSD.
- Marketing has authority regarding word choice and content.
- Send test email to all managers.
- Add CSD to all distribution lists as well as Jon Eastlund and Daniel Robins.
- Do not save RMS lists on your hard drive.

Email Operations

- Alert the CSD one week prior to sending when possible.
- Get current distribution list from Jon Eastlund & Gina Arias. Provide a due date on Jon Eastlund's calendar.
- Establish a send date as an event in the calendar and invite Jon Eastlund and Daniel Robins.
- Set reply address to a forwarding email on this [list](#) that is connected to Communications staff only, e.g. ridesharepromo@511.org. Replies should not go to the CSD.
- Communications will draft and approve content for all promotional e-mails.
- Do not store RMS lists on your hard drive.



Personally Identifiable Information (PII) Guidelines Communications Materials and Other Documents

Scenarios

Personally Identifiable Information (PII) requires “special handling” when entities outside of the RRP program request it for their own ridesharing/transportation purposes. RRP often collects contact information and some travel pattern data as part of marketing campaigns and promotions, particularly if prizes are awarded. In some cases, prize sponsors and other entities may request this information for prize fulfillment.

MTC has provided direction on steps to take **when non-RRP entities request access to PII from marketing campaigns:**

- **Disclosure** - if the information collected during the marketing campaign might be provided to a third-party, disclosure to the public is required. MTC has provided language for these disclosures which should appear in campaign Terms & Conditions:
 - Marketing Campaign or Promotion
Please complete this <registration form, etc.> with your <contact info, trip info, etc.>. This <registration form> will be collected by a consultant(s) under contract with the Metropolitan Transportation Commission (MTC) to collect and analyze data for the purpose of providing ridesharing/transportation services and/or fulfilling this promotion. The consultant(s) may, in turn, share the data with other parties for ridesharing / transportation purposes and/or fulfilling this promotion. MTC disclaims any and all liability associated with providing information in this <registration form, etc.>.
- **Decision to Include Disclosure Language** - Prior to a marketing campaign or promotion, RRP Marketing staff should determine if PII data might be shared with other parties for ridesharing / transportation purposes and/or fulfilling the promotion. If so, the disclosure must be included with the promotion Terms & Conditions in order to distribute the PII to a third party. If the disclosure is not included, the PII cannot be distributed. Although it is not required for all campaigns, disclosure language can be included on any promotion Terms & Conditions so that distribution of data is not precluded. The decision of including the disclosure for any specific promotion will consider the recommendations of the marketing staff (the final decision will be at the discretion of the Evaluation Manager or Project Manager).

Required Logos and Phrases on 511 Materials and Communications

- All publicly viewed/targeted materials (advertising, reports, print, out-of-home and collateral) should follow the 511 Brand Guidelines. When a specific material or media is not listed in the Brand Guidelines, PB/511 staff will make recommendations to MTC and seek approval and/or modifications to meet branding standards.
- All 511 advertising should contain the 511 logo and call to action (Call 511-511.org-m.551.org). When room permits, the tag line should also be used.
- All advertising should use Pantone or PMS formula equivalents of the 511 greens (per the Brand Guidelines). Print: PMS 363C / 362U. Online: RGB: 82 / 117 / 53.



- 511 Rideshare-specific advertising - When collateral material has sufficient printing/display space, the following logos must appear: 511 and/or 511 Rideshare, MTC and BAAQMD. Whenever MTC and BAAQMD logos are used on collateral, a product proof must be approved by appropriate MTC staff.
- 511 Rideshare-specific materials – When space allows, the following phrase should be used on Rideshare-specific (3B.1) materials:
 - The preparation of this [document] has been financed in part by grants from the Federal Highway Administration and the U.S. Department of Transportation. The contents of this [document] do not necessarily reflect the official views or policy of the U.S. Department of Transportation.
- Samples of all advertising should be provided to Alysha Nachtigall with a summary of performance statistics and cost.