

**Davenport Institute Case Story**  
**San Francisco Municipal Transit Agency**  
**Public Outreach and Engagement Team Strategy (POETS)**

**Sponsoring Agency:** The San Francisco Municipal Transportation Agency (SFMTA) oversees the public transit system (MUNI), bike and pedestrian programs, and taxis parking and traffic control operations in San Francisco. It is responsible for moving over one million people safely and efficiently each day and employs over 5,000 staff. It must deliver hundreds of capital projects to improve streets, public transit and safety each year.

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**The Problem:** High levels of stakeholder frustration at a lack of information and/or involvement. Too often outreach was conducted poorly, too late or not at all. Costly delays resulted from threatened lawsuits, negative press, protests and political pressure for failure to communicate properly.

Moreover, the public was angry that it was hard to learn from the SFMTA who was in charge of a given project; the projects were often delayed in completion; there were limited tools or means to communicate with the agency; and there was no standard approach to public engagement on projects. This caused a considerable number of “pain points.”

**Proposed Solution:** Development of a new strategy known as POETS – Public Outreach and Engagement Team Strategy. It would include standards, guidelines and resources that all project staff would use to effectively interface with the public. Community outreach and engagement activities would become integral to the planning and execution of all SFMTA projects. The POETS mission would be accomplished by:

- Defining public outreach standards
- Delivering assessment and planning templates
- Ensuring quality through relevant training, recognition and supporting resources

**Goals:** Its primary goals were to provide the public with comprehensive, well-communicated project information, build trust, and assure people that concerns were heard and considered

and that community feedback would help shape the projects. Better relations with key stakeholders, less “pain points,” more effective project delivery and better overall public image were all expected outcomes.

**The Process:** The POET Peer Group was formed in August 2014, comprised of 40 hand-picked Project Managers and Project Leads chosen for their leadership skills from multiple divisions across the agency. It succeeded in winning buy-in from all of the departments. Over a year, the Poet Peer Group conducted research on best practices, solicited feedback on drafts and vetted standards and guidelines. Ideas were sought from Portland, Boston, Los Angeles and New York. No one on staff could claim to be uninformed of the work.

That led to the launch of the Public Outreach Notification Standards. The next year was spent developing a feedback mechanism for external stakeholders on POETS process and progress, training classes, a recognition program, reporting mechanisms and a POET website.

**Outputs:** The new Standards require all Project Managers and Project Leads to develop a Project Needs Assessment and Communication Plan for each SFMTA project: small to very big - whether it is a route change, bulb-out, or tunnel or rail line extension. Even the smallest project will include Stakeholder Briefings, Multi-Channel Notification and Public Meetings as needed. Varying audiences require varying tactics. This involves providing all Project Managers and Project Leads with the training, tools and resources to do so properly. The aim is to force Project Mangers/Leads to think about their projects more thoroughly and be accountable for their Communication Plans.

**Outcomes:** After one year, SFMTA has generated many quality Needs Assessments and Communications Plans, has been more inclusive and has received far more public input than previously. The agency has a better understanding of the totality of projects underway Citywide. New techniques and technologies have been employed for outreach and public engagement, and there is a better understanding of many of the key players in the community.

Metrics have been developed to evaluate POETS, including both quantitative and qualitative measures. Annual community attitude surveys, focus groups of stakeholders and internal surveys are used to gather information and measure compliance. Early indicators are positive. More time is needed to be definitive.

**Lessons Learned:** Don't underestimate the power of the community to stop a project due to poor outreach. A potential lawsuit or a delay of a year or more is quite possible with impacts on other projects as well. Troubleshooting a project after the fact is very costly.

Hearing authentic feedback for the community served can be tough to take.

It can be surprising how many staff see no need to alter the way things always have been done in outreach and engagement. The learning curve is steeper and longer than imagined. Getting department head support at the outset is crucial.

More of the engagement efforts involve consulting rather than simply informing.

Give staff some freedom to design their own plans rather than sticking to a rigid template.

Sometimes community meetings are not the answer. The attendees are much more sophisticated, demanding and often tougher on public servants than a decade ago. Must prepare staff to effectively cope with what can be volatile situations. Other techniques and technologies may actually be better.

Success requires lots of patience, determination and time to achieve, but is worth it. Being open, up-front and genuine with community is rewarding. Such public projects will cause inconveniences and even hardships while under construction. Be willing to work with people to understand their concerns and mitigate as many as possible. Only good comes of it.

***What Can Be Replicated?*** All of it. Ms. Desedas hopes that the POETS approach will become the standard throughout the City and County of San Francisco. She thinks other agencies may find aspects of this strategy to be worth emulating. To those struggling with an angry public over the impacts of capital projects, she reminds them “You are not alone.”

***Resources:***