ACT! DATABASE REFRESHER

Context and tips on how to use the Regional Employer Outreach Database

Mark Hersey
Commute Programs Specialist

Commuter Connections Employer Outreach Committee
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COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Presentation Overview

Part 1: ACT's Role in Calculating Program Impact

Part 2: ACT Database Management Tips

Part 3: Question & Response

Part 1:
ACT's Role in Calculating Program Impact

Commuter Connections TDM Evaluation

- Context: Triennial impact analysis of Commuter Connections' TDM activities to **estimate impacts** and **communicate program value** to funders and regional policy-makers
- Impact Calculation Approach for Employer Outreach (EO):
  - Impractical to survey every employee…
  - As an alternative, a **predictive model** is used for the specific services offered by each EO client
    - Requires understanding of how TDM services influence travel behavior change and the extent of change that is likely for each respective service

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Impact Factors

- Consider primary travel mode choice factors when interpreting employers' TDM programs. Use these factors to help evaluate/classify each employer program:
- **Travel Time:** *How long will the trip take*?
  - Door-to-door travel time; access/walking/waiting time
  - Reliability/certainty of time – will bus or carpool partners arrive on time? Are traffic conditions consistent?
- **Cost:** *What is the cost to commute?*
  - Actual out-of-pocket cost
  - Fixed costs (e.g., car ownership)
  - Distributed cost (e.g., monthly parking pass, toll debit account)

Impact Factors (cont.)

- **Availability**: *Is the mode available and feasible for commuters to use?*
  - Transit/vanpool service exists where and when commuter needs to travel
  - Other travel needs that require personal car (e.g., work travel, childcare, etc.)
- **Safety:** *Does the commuter feel safe/secure using the mode?*
  - Waiting for bus/train to arrive
  - Riding in vehicle/riding with strangers (e.g., transit, car/vanpool)
  - Travel on busy streets (e.g., bicycling, driving in traffic)
  - Confidence of not being stranded without transportation
- *EO context reminder: How does the employer address these factors?*

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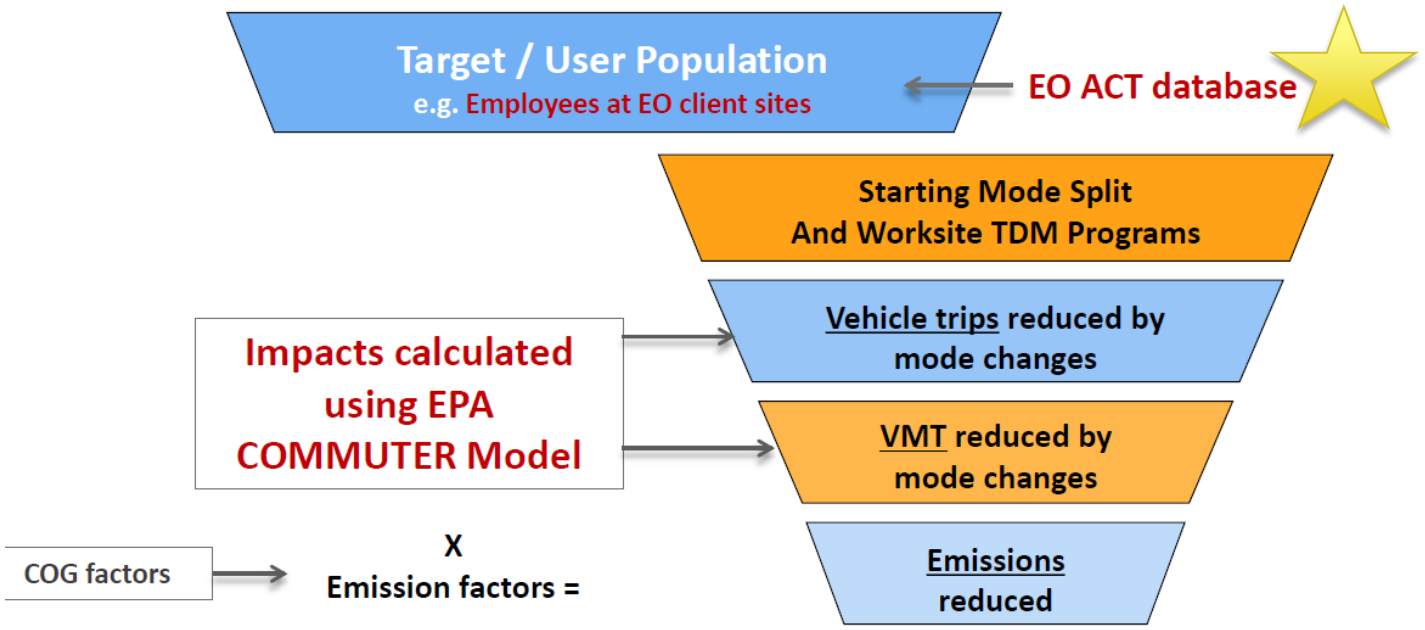
ACT & Calculating Program Impact

- In calculating program impact, the ACT Regional Employer Database serves as a **primary input** for the model.
  - In other words: Quality data from ACT is necessary to calculate the program impacts that justify the Employer Outreach program



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Inputs for EPA Commuter Model

- Number of employees at worksite
- “Office”/”non-office” employer type – proxy for job types, schedules, employee incomes
- Level of transit service (low, moderate, high)
  - Reflect likely influence of transit incentives
  - Proxy for “urban-ness” – urban settings provide greater SOV disincentives and greater alternative mode motivations
- Starting Mode Split
  - Actual mode split – if employer has conducted baseline survey
  - Average for employer/transit combo if no survey available

Inputs for EPA Commuter Model (cont.)

- Travel distance for each mode
- Specific package of TDM strategies offered at the worksite
    - Tip: Familiarize yourself with the various classifications of Employer Levels (e.g., Level 1, 2, 3, and 4) to better understand the wide array of TDM strategies that may be deployed by employers

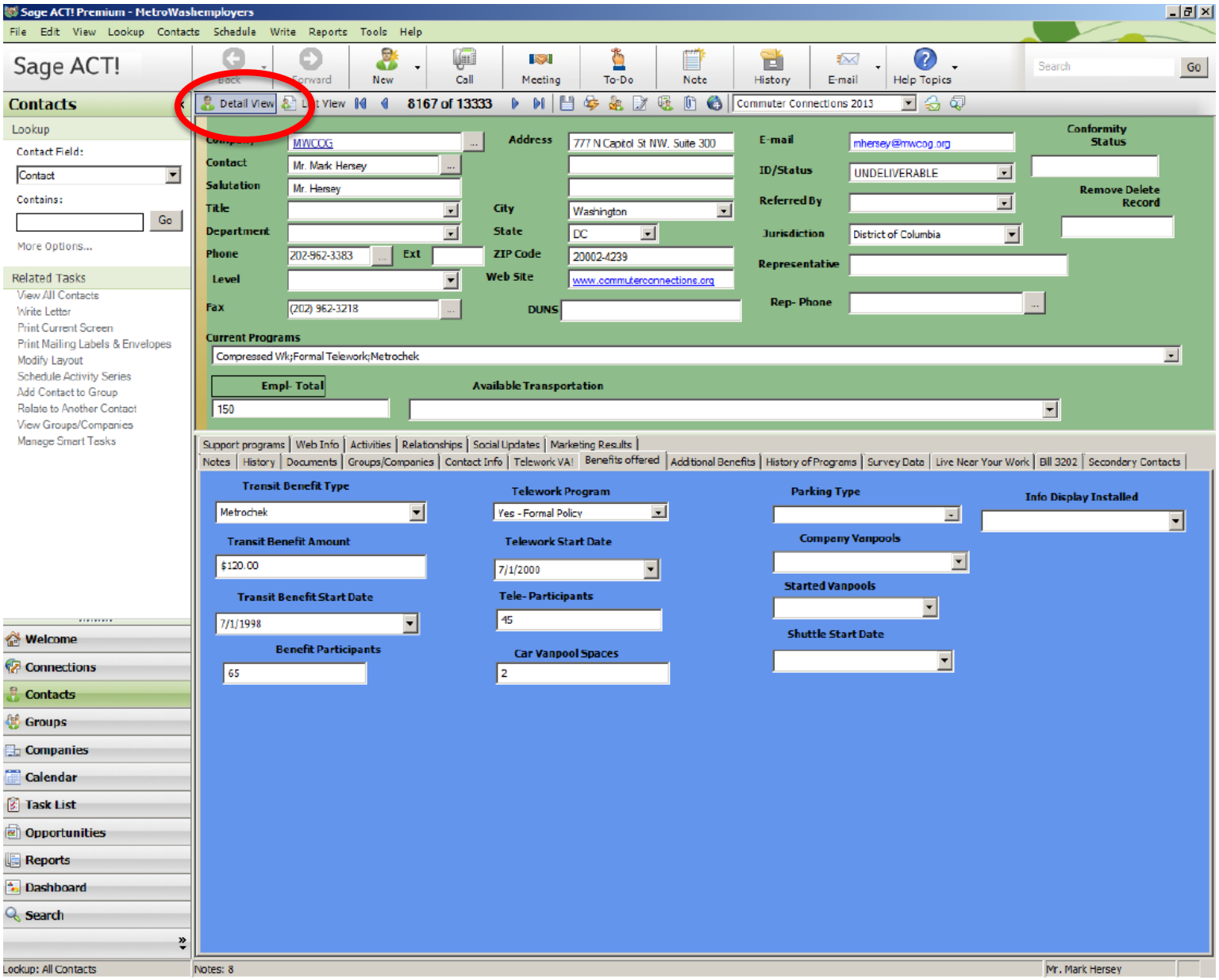
Part 2:
ACT Database Management Tips

Employer Data: Foundations

- As detailed in previous section: High levels of data integrity are instrumental to calculating accurate program impacts.
- To build and maintain a high-quality record, start by including the below foundational information:
  - Worksite Address (including zip)
  - Worksite Jurisdiction (as it relates to the EO Program)
    - *This is helpful when searching/classifying employers*
  - Contact Name (i.e., ETC Name)
    - *A title is not a person! But is also helpful info to note*
  - Contact Phone Number & Email
  - Number of Employees at the Worksite

Employer Data: Other Helpful Info

- Employer Website URL
  - *Helpful for updates (such as when there is an address change)*
- Snapshot(s) of Current TDM Programs/Benefits
  - *Detail any/all programs that exist upon initial contact and how the programs evolve over time*
- Contact Log
  - *Enter notes that detail outreach attempts, presentations given, services rendered, events attended, etc. to maintain a high level of customer relationship management*
- ID/Status
  - *If "undeliverable", check with contact to verify address*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Write Letter
Print Current Screen
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Modify Layout
Schedule Activity Series
Add Contact to Group
Relate to Another Contact
View Groups/Companies
Manage Smart Tasks
MWCOG
Address 777 N Capitol St NW, Suite 300
Contact Mr. Mark Hersey
Salutation Mr. Hersey
Title
Department
Phone 202-962-3383 Ext
Level
Fax (202) 962-3218
City Washington
State DC
ZIP Code 20002-4239
Web Site www.commuterconnections.org
DUNS
E-mail mhersey@mwcog.org
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Transit Benefit Amount $120.00
Transit Benefit Start Date 7/1/1998
Benefit Participants 65
Telework Program Yes - Formal Policy
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Lookup: All Contacts
Notes: 8
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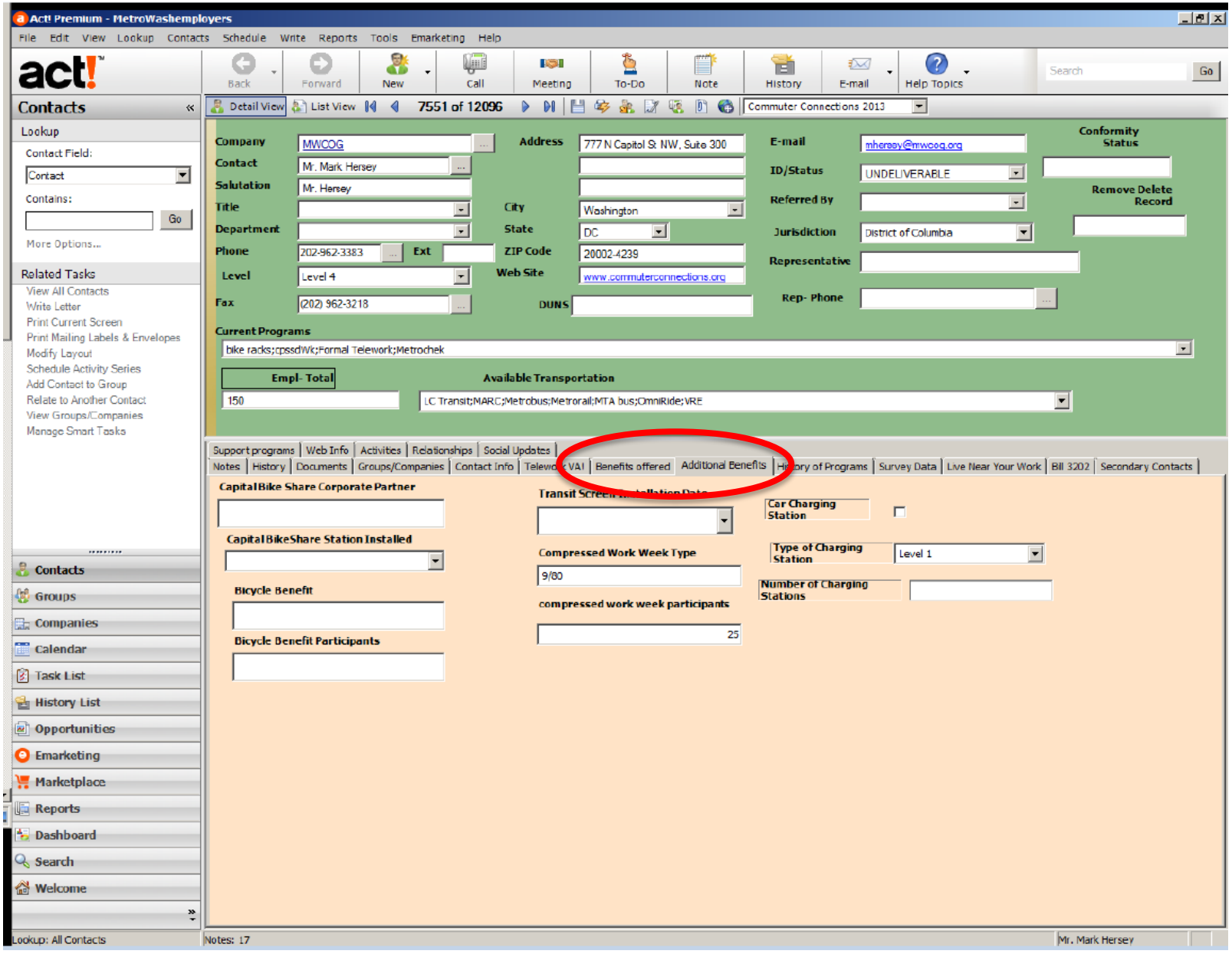
Employer TDM Programs & Benefits

- Consider the following details when populating snapshots of an employer's offering of TDM Programs & Benefits:
  - **Transit benefits**: Include start date, type of benefit, number of participants, and dollar amount
  - **Bike Benefit**: Detail dollar amount and number of participants
  - **Telework:** Indicate whether formal or informal; include start date and number of participants
  - **Compressed/Flexible Workweek:** Note the type (9/80 or 4/40) and number of participants
  - **Shuttles**: List start date and which (if any) transit connections are included in the service
  - **Company Vanpool**: Note start date and number of participants

Employer TDM Programs & Benefits (cont.)

- Consider the following details when populating snapshots of an employer's offering of TDM Programs & Benefits:
  - **Capital Bikeshare Partnership**: Number of participants
  - **Info Display**: Note installation data and materials provided
  - **Electric Vehicle Charging Stations**: Number and type of stations
- This list is not meant to be limiting! Please list/detail any other TDM strategies that may be utilized by the employer.



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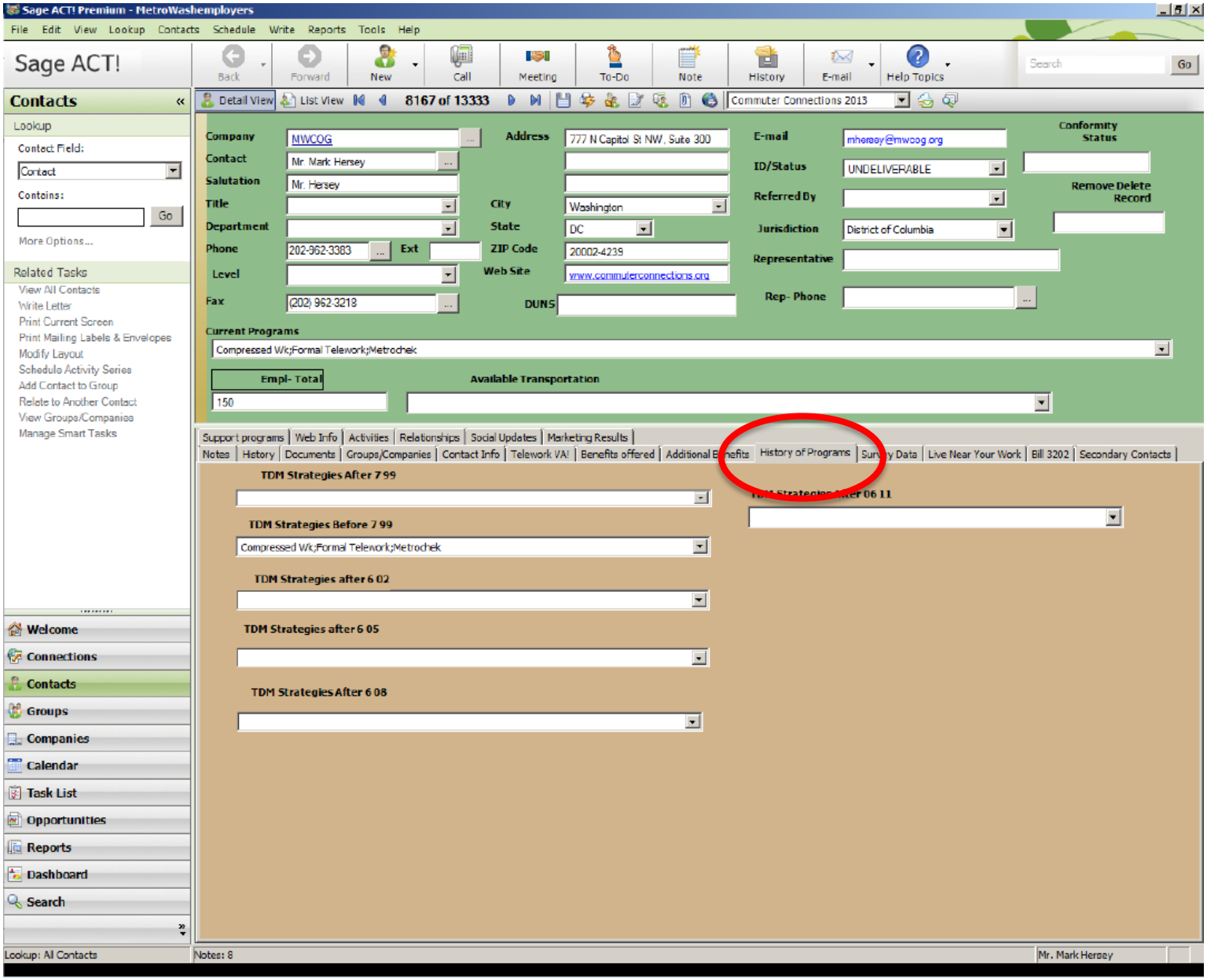
History of Programs

- This tab is available to see when the programs were counted in past TERM/TDM evaluations
- It's a valuable piece of information on employers who may have discontinued programs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Phone 202-962-3383 Ext
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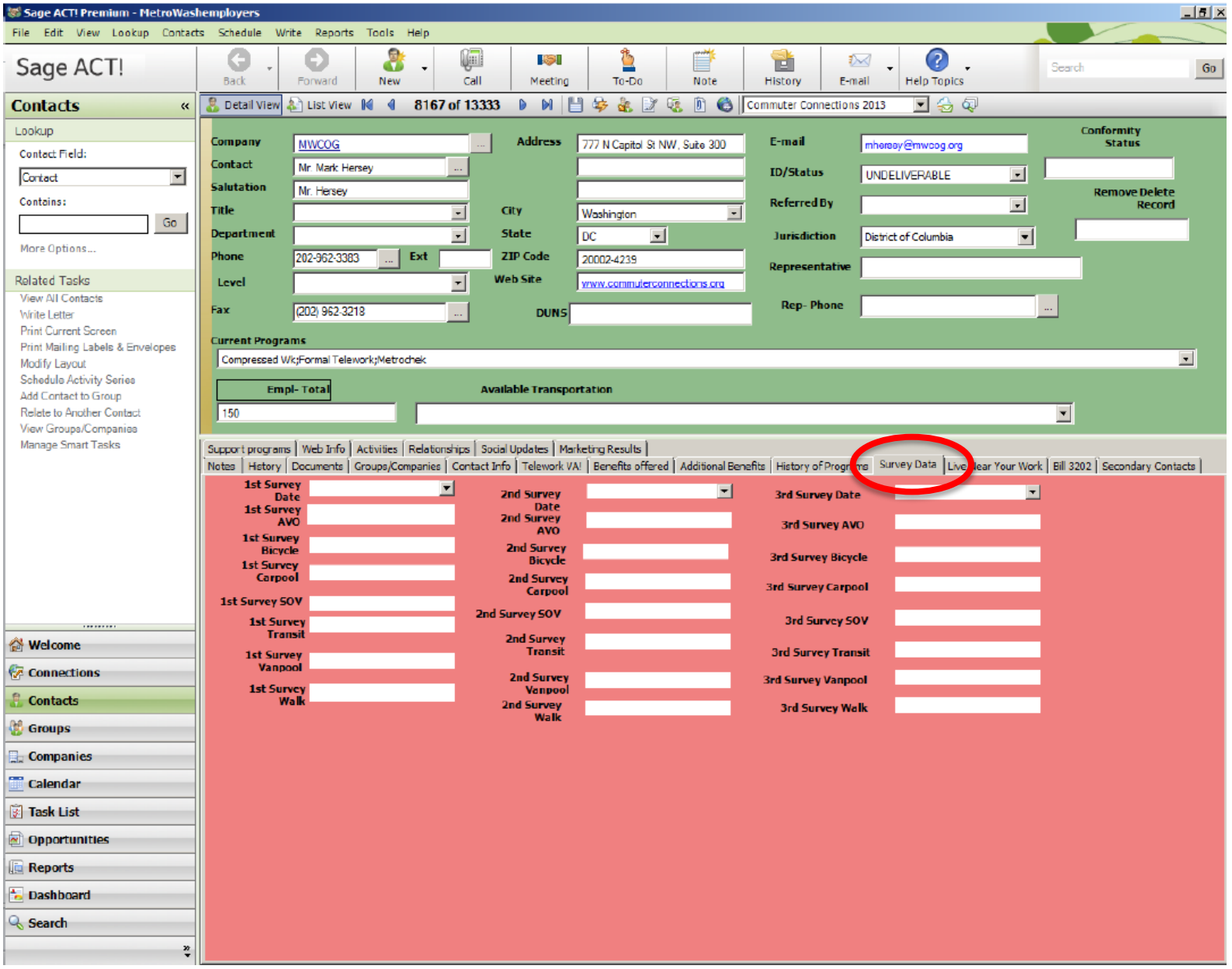
Survey Information

- This tab offers a repository of survey results when an **Employer Commuter Survey** is offered at a worksite
  - Complete database archive: ccs.mwcog.org
- Employer Commuter Surveys help calculate Single-Occupant Vehicles (SOV) and Average Vehicle Occupancy (AVO)
  - This is valuable information for measuring impacts of alternative commutes to the worksite
  - Another crucial input for evaluating program effectiveness (see slide 7)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Part 3:
Question & Response

Questions will be addressed via live demonstration

Questions?

1. Why do accounts appear to “go missing” in the ACT Database? Are they being deleted?
    a) Why do the conformity reports not match locality’s records on occasion?
2. What is the relationship between a company contact and the employer? How does contact’s info affect the status of an employer record? (For example, when mail bounces back.)
3. What is the reason for not having direct control over accounts? This creates challenges because things seem to be deleted that shouldn’t be (and vice-versa). It takes a considerable amount of time to do a comparison in order to determine where the differences lie and how they occurred.

Questions? (cont.)

4. Is it possible to run a report to see when contacts were added to/deleted from the database?
5. Is it possible to batch notes across multiple contacts? For example, is it possible to make a note across all 40 contacts noting that they responded to a newsletter posting or attended an event?
6. Is it possible to run a report on edited contacts by date or time frame? Last edited?
7. Is it possible to run a report on contacts per benefit offered? For example, all contacts who offer SmartBenefits Pretax vs. SmartBenefits Subsidy vs. SmartBenefits Pretax AND Subsidy, contacts who offer telework vs co-working, etc?

Questions? (cont.)

8. How can we update/manage the record manager as staff turnover? For example, Alexandria's login is under Brooke Waller who has not worked there for several years.
9. Are there opportunities for credits for "reincorporated employers" - those who had outdated records or who just want to update their commuter program?

Any other questions?

- Questions about ACT are always welcome! Please submit to mhersey@mwcog.org and nramfos@mwcog.org.

Mark Hersey

Commute Programs Specialist
(202) 962-3383
mhersey@mwcog.org

commuterconnections.org

Metropolitan Washington Council of Governments
777 North Capitol Street NE, Suite 300
Washington, DC 20002

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