

**STAFF REPORT FOR CALENDAR ITEM NO.: 10
FOR THE MEETING OF: September 8, 2022**

TRANSBAY JOINT POWERS AUTHORITY

BRIEF DESCRIPTION:

Approve the Downtown Rail Extension (DTX) Rebranding Plan consisting of a new name, marks, and tagline as supported by the Executive Steering Committee (ESC) under the terms of the San Francisco Peninsula Rail Program Memorandum of Understanding (MOU).

EXPLANATION:

Background

The TJPA, with the support and engagement of its partners, is actively developing Phase 2 of the Transbay Program, which includes design and construction of DTX. The San Francisco Peninsula Rail Program Memorandum of Understanding (MOU), effective June 5, 2020, described, in part, an organizational structure to support the efforts of the TJPA to develop the DTX project to ready for procurement status.

Among the elements of the MOU was the creation of a detailed Comprehensive Work Plan for the development of DTX, which was adopted by the Board in December 2020. In April 2021, the Board adopted an acceleration modification to the Work Plan. The MOU and Work Plan describe various tasks to be conducted in the project development process.

One of the MOU tasks is development of a recommended rebranding for the DTX project to reposition it to strategically engage diverse audiences and raise awareness and public support. The MOU specified that this work was to be led by TJPA with concurrence from SFCTA and contributions from the other MOU partners. The MOU contemplates that the TJPA Board will exercise approval authority over the recommended rebranding.

Rebranding Plan

Under the Work Plan, the objective of the rebranding is to reflect the DTX importance to the mega-region and the State of California. The Rebranding Plan was expected to identify strategies and required resources to demonstrate the broad benefits of the DTX project from a transportation, economic impact, environmental, and community perspective. The implementation of the Rebranding Plan is intended to result in durable and long-term support of key stakeholders and the broader public.

A Rebranding Plan for the DTX should:

- Rebrand the project name so it resonates its regional, and national significance;
- Reposition the DTX project to strategically engage diverse audiences;
- Raise awareness and public support for the Project, reframing its benefits to having local, regional and national impact; and
- Highlight DTX as a critical component of the larger integrated transportation plan for the entire region and megaregion.

Development of Recommended Name, Marks, and Tagline

The Rebranding Plan process began in Spring 2021, was presented to the Board in October 2021, and used an insights-based design and discovery process to obtain information of the public's familiarity with the project and current DTX name. This first phase of the effort consisted of an online survey distributed to 400 voters along the major transit corridors of the Bay Area (including five counties: Santa Clara, San Mateo, San Francisco, Alameda and Contra Costa) and three 1-hour listening sessions with key interest groups and organizations. The survey revealed project awareness was low, but familiarity was highest in San Francisco, San Mateo, and Santa Clara counties even though this is a project impacting the entire Bay area. Once voters were informed about the project, nearly 4 in 10 said that it feels very or extremely important to them personally, with importance highest for Black, Hispanic, Asian Pacific Islander, and San Francisco voters.

The survey and listening sessions confirmed that the project's current names ("Downtown Rail Extension" or "DTX") do not resonate strongly with the public. The three listening sessions also confirmed project awareness was low and a public desire to know more about the project and build more excitement for the project's scope and impact to the entire Bay Area.

The second phase of the Rebranding Plan process, which commenced in Spring 2022, was design of a new name with mark and tagline for the project. The team focused on the project's benefits as conveyed by the Benefits Case analysis led by the San Francisco County Transportation Authority (SFCTA). The Benefits Case analysis served as both inspiration and criteria for the new name. The project name along with mark and tagline should embody the core benefits of the project in terms of:

- **Mobility:** The project will make travelling throughout the Bay Area and California faster, more reliable, and more connected.
- **Economic:** The project will support economic competitiveness and improve access to jobs.
- **Community:** The project will support climate and equity goals for the Bay Area and California.
- **Future-Forward:** The project is a foundational step in the next generation of rail expansion for the Bay Area, Northern California, and the State.

The TJPA coordinated with our communications design team, D&A Communications, Inc, to develop the following three themed categories to inform the recommended new name and mark:

1. Gateway builds and future-forward transportation
2. Accelerator of transportation service focusing on rail
3. Combination of Bay Area's geographic location and the benefits of accelerating transportation and the economy

The design team also identified certain factors critical to the success in any new name and mark, including understanding by diverse audiences; relevance and application to the Bay Area's diverse communities; and clarity, adaptability, and simplicity.

We used an iterative engagement process to obtain internal and external feedback and support for the new name, marks, and tagline. The design team presented names and marks to

communication professionals from SFCTA, Caltrain, California High Speed Rail Authority, and the City and County of San Francisco. The design team presented names and marks to two focus groups, consisting of participants from diverse backgrounds. Additional feedback was received from our state and federal delegations. The TJPA presented the recommended name, marks, and proposed taglines to the Integrated Program Management Team on July 12, 2022 and the ESC on July 22, 2022; the ESC supports the recommendation.

Recommended Rebranding - The Portal

With the support of the ESC, the TJPA design team recommends rebranding the project with the new name “The Portal” and using the marks illustrated below. This will be accompanied with the tagline “Unlocking Bay Area and State Rail Connections.”



The design team recommends using both of the above-illustrated marks. The marks depict rail, with some seeing a train arriving to take them to their next destination and some seeing a train departing through a tunnel. The circle mark provides continuity with the TJPA agency logo's circle found in the P, which was created to show the Center as a placemaker for transit and community. The marks can be used in black and white, or with orange coloration. The orange palette builds on and provides color continuity with the TJPA's agency logo.

Through The Portal, we look to generate excitement and support from the public not familiar with the project and convey the project's magnitude for the region and the state. As we secure funding to complete the project, we will use The Portal to pique people's interest about the future of the region and State's rail connections while creating press coverage and social media buzz about the project. As the project is in a good position to advance through the state and federal funding process, rebranding the DTX with The Portal helps raise awareness about the project and emphasize its importance of unlocking the Bay Area and State's rail connections.

The recommended rebranding is a unique way to demonstrate how this important transportation project is a gateway to unlocking and accelerating our region's mobility, economy, and community to transport us into the future. The marks play off the tunnel's shape while also conveying rail. The marks look modern and future-forward and adapt well to collateral and signage. The new name and marks can stand out in the sea of transit agency logos and names currently found in the Bay Area. The new name's sci-fi connection helps convey that this project

is future forward. The Portal conjures up the idea of a rider porting from the Center to their next destination in the Bay Area and/or throughout the State.

The tagline “Unlocking Bay Area and State Rail Connections” speaks to the importance of creating an integrated transportation system that transcends downtown San Francisco and connects the region and many of the largest cities in California. This tagline would accompany the new marks so that it grounds the important role, service and benefits this project will have on the Bay Area and the State, as a whole.

Although some have expressed interest in keeping the DTX name, as explained in the MOU and as borne out by surveys and focus groups, there is a broad recognition of the need to rebrand the project to speak to its regional connectivity and its importance of bringing rail connections to the entire Bay Area and State of California. However, the DTX name will remain in formal and/or technical documents as previously submitted or required, but will be accompanied with an explanation of the use of the new name and corresponding elements.

In the presentation deck are mockups of what the new name, mark and taglines would look like with TJPA and our MOU partners’ logos. Upon approval by the Board of Directors, this new name and the corresponding elements will be finalized to be utilized in a mini awareness campaign by TJPA, in coordination with its MOU partners, consisting of social media and earned media starting in Fall 2022. Collateral will include an updated project factsheet, key messaging plan, frequently asked questions document, and an updated public presentation.

RECOMMENDATION:

Approve the Rebranding Plan which consists of a new name, marks and tagline for the DTX project, as supported by the ESC under the terms of the MOU.

ATTACHMENTS:

1. Resolution

**TRANSBAY JOINT POWERS AUTHORITY
BOARD OF DIRECTORS**

Resolution No. _____

WHEREAS, The Transbay Joint Powers Authority (TJPA) is a joint powers agency organized and existing under the laws of the State of California; and

WHEREAS, Pursuant to state law and the Joint Powers Agreement creating the TJPA, dated April 4, 2001, the TJPA has primary jurisdiction over and will implement all aspects of the Transbay Program, including the portion of the Transbay Terminal/Caltrain Downtown Extension/Redevelopment Project commonly referred to as Phase 2/Downtown Rail Extension (DTX); and

WHEREAS, The TJPA is actively engaged in developing the DTX; and

WHEREAS, On April 9, 2020, the TJPA Board of Directors authorized the TJPA Board Chair to execute the San Francisco Peninsula Rail Program Memorandum of Understanding (MOU) with the Metropolitan Transportation Commission, the San Francisco County Transportation Authority, the Peninsula Corridor Joint Powers Board (Caltrain), the California High-Speed Rail Authority, and the City and County of San Francisco (Mayor's Office); and

WHEREAS, The MOU described, in part, an organizational structure to support the efforts of the TJPA to develop the DTX project to ready for procurement status, including the formation of an Executive Steering Committee (ESC) to make recommendations to the TJPA Board; and

WHEREAS, The MOU and the associated comprehensive work plan contemplate that the DTX project will be rebranded to reflect its importance to the mega-region and State of California; and

WHEREAS, On July 22, 2022, the ESC expressed support for the DTX project Rebranding Plan, as recommended by the Integrated Program Management Team; now, therefore, be it

RESOLVED, That the TJPA Board of Directors approves the Rebranding Plan for the DTX, which includes a new name, marks and tagline for the project, as supported by the ESC and as described in the accompanying Board Report presented herewith.

I hereby certify that the foregoing resolution was adopted by the Transbay Joint Powers Authority Board of Directors at its meeting of September 8, 2022.

Secretary, Transbay Joint Powers Authority

Transbay Program Downtown Rail Extension Rebranding

TJPA Board
September 8, 2022



San Francisco
County Transportation
Authority

DTX Rebranding Plan

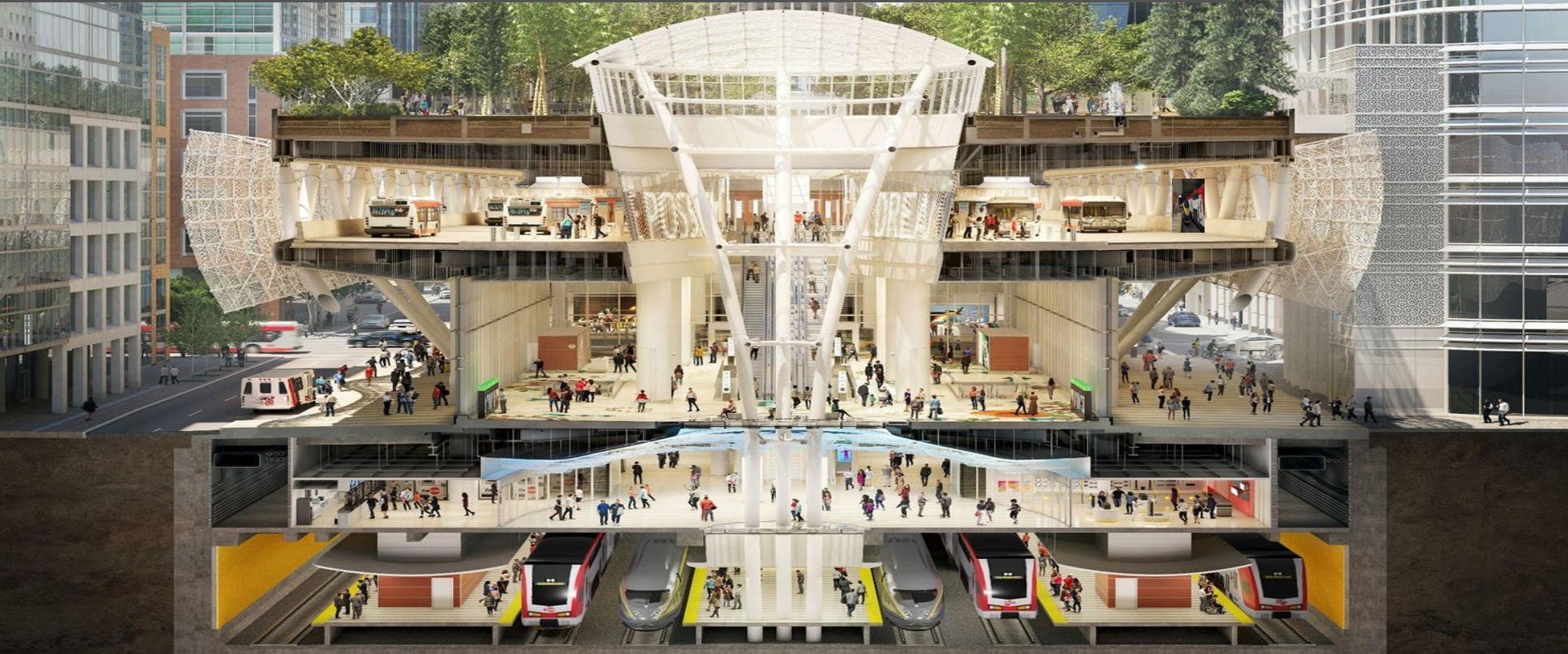
Task 7 of the SF Peninsula Rail Program MOU identified the need to “Develop a rebranding strategy to reposition the DTX program... with updated graphics and messaging based on economic benefits for the region, state, and nation.”

In collaboration with our ESC partner agencies (Caltrain, California High-Speed Rail Authority, SF County Transportation Authority, City and County of SF Mayor’s Office, and Metropolitan Transportation Commission), we developed a new name, mark and tagline to rebrand the DTX project.

Our Process

1. Phase 1 Discovery (Spring 2021) research to inform design
2. Phase 2 (Spring 2022)
 1. Design sprint workshop and refinement
 2. Presented name/mark options to ESC communication members
 3. Conducted stakeholder workshops on rebranded name, mark and developed taglines
 4. Presented to MOU Integrated Program Management Team, ESC, TJPA Citizens Advisory Committee

Phased 1 Discovery Process



Low Awareness and Familiarity with Project

1. Distributed online survey to 400 voters along the major transit corridors of the Bay Area

Findings

- Only a small proportion of voters (12%) across all five counties report being very familiar with DTX, although another 28% say they are somewhat familiar with DTX. *Familiarity is highest in San Francisco, San Mateo, and Santa Clara counties.*
- Once voters learn more about the project, nearly 4 in 10 (38%) say the project feels very (23%) or extremely (15%) important for them personally. *DTX's importance is highest for Black, Hispanic, Asian Pacific Islander, and SF voters.*
- The project's current name (Downtown Rail Extension/DTX) does not resonate strongly with survey voters.

2. Conducted 3, 1-hour listening sessions with key interest groups and organizations related to the project

Findings

- Awareness: Non-transportation advocates really don't know much about the project and people want more information.
- Project name: A new name for the project would help to build more excitement. The current name gives the impression that the project's scope is relegated to downtown SF. Transportation advocates feel that having a new name would help them better communicate the project's importance.

Phase 2: Rebranding the DTX



Rebranded New Name & Mark Objectives

- Generate excitement and support from community members who are unfamiliar with the project
- Convey the project's magnitude for the region and the state
- Pique people's interest about the future of transportation for the region and the state
- Create press coverage and social media buzz about the project
- Secure funding to bring the project to fruition
- New name and mark used only for the duration of the project

Benefits Case Study Informs Rebranding

When developing name options, the project's core benefits as outlined in the Benefits Case study served as an inspiration and criteria:



Mobility: DTX will make traveling throughout the Bay Area and California faster, more reliable, and more connected.



Economy: DTX will support economic competitiveness and improve access to jobs.



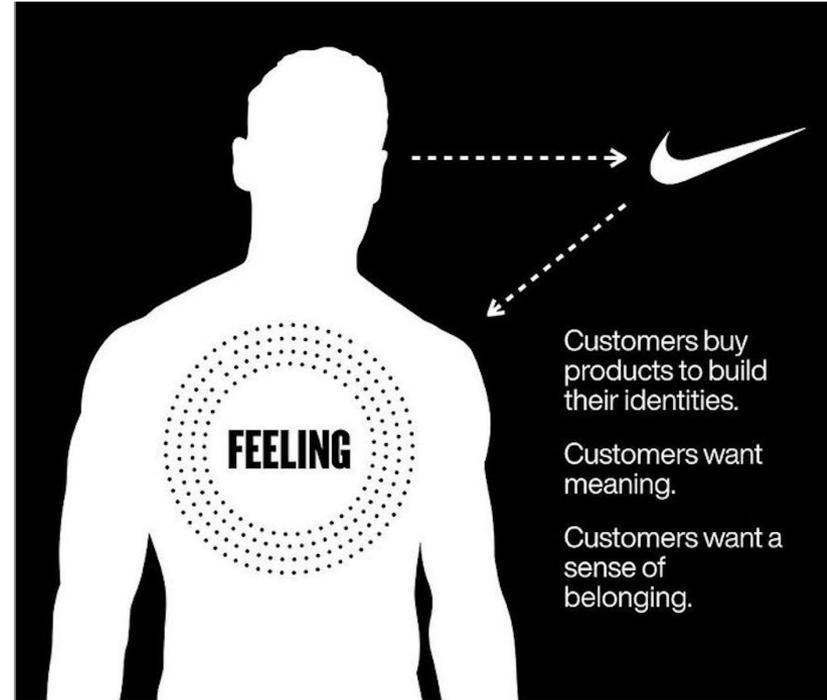
Community: DTX will support climate and equity goals for the Bay Area and California.



Future-Forward: DTX is a foundational step in the next generation of rail expansion for the Bay Area, Northern California, and the State.

Factors for Name & Mark Success

- Audience-focus
- Relevancy
- Credibility
- Distinctiveness
- Simplicity
- Adaptability







The Portal Name and Mark



THE **PORTAL**



THE **PORTAL**

THE **PORTAL**

THE **PORTAL**

The Portal + TJPA Mark Lockup



THE **PORTAL**



TRANSBAY JOINT POWERS AUTHORITY



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THE **PORTAL**

Why “The Portal” Works

- It is a unique way to demonstrate how the Project is a gateway to accelerating our region’s mobility, economy, and community to transport us into the future
- Builds off the building’s shape while also conveying rail
- Feels modern and future-forward
- Adapts well to collateral and signage

Audience-focused | Relevancy | Credibility | Distinctiveness | Simplicity | Adaptability

2022 Focus Groups Key Findings

Common themes, phrases and sentiments expressed in the name & mark focus groups:

- **Tagline Needed:** While participants agreed the new name and mark would spark interest in the project, most participants agreed that having a tagline to accompany it would help tell the overall story of the project.
- **Sci-Fi:** People understood the sci-fi connection to the name and mark and felt it would help convey that this project is future forward.
- **Rail Connection:** Most participants recognized the rail connection of the mark. Some saw it as a train coming to take them to their next destination and some saw it traveling through a tunnel.
- **More Info Needed:** Participants expressed interest in learning more about the project.

The Portal with Tagline



THE PORTAL

**UNLOCKING BAY AREA
AND STATE RAIL CONNECTIONS**

THE PORTAL

UNLOCKING BAY AREA AND STATE RAIL CONNECTIONS

Example: The Portal + Partner Mark Lockups



THE **PORTAL**



THE **PORTAL**



CALIFORNIA
High-Speed Rail Authority



THE **PORTAL**



THE **PORTAL**

UNLOCKING BAY AREA AND STATE RAIL CONNECTIONS

The Portal in Action



Next Steps

Staff recommends approval of new name, mark and tagline. Upon approval, we would take the following steps:

- Update DTX project factsheet and develop Frequently Asked Questions to reflect The Portal using new Key Messaging Plan
- Develop Community Presentation with new brand and key messaging that can be tailored to diverse audiences
- Coordinate with ESC MOU partners on key messaging and timing of outreach to leverage existing partner channels
- Develop integrated “Mini-Awareness” campaign featuring new brand and project benefits

Questions?

