

UW TRANSPORTATION SERVICES

**Standard Operating Procedure**



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UNIVERSITY OF WASHINGTON TRANSPORTATION SERVICES

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# COMMUTE CONCIERGE EVALUATION SOP

3/27/2015 Revision

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# INTRODUCTION

## INTRODUCTION

The Commute Concierge is a personalized commute assistance program that provides UW commuters with personalized commute plans, an individualized suite of informational materials, and answers to all their commute questions. The program began in August 2014, and like all programs, requires evaluation to determine success and how to make improvements to achieve established goals.

### 1.1 STANDARD OPERATING PROCEDURE

This SOP is intended for the Commute Options Assistant Manager and other Commute Options staff to guide the evaluation of the program.

Please keep in mind that this is a living document and should be updated and amended as changes occur to the Commute Options team or its shared information.

## GOALS AND METRICS

### INTRODUCTION

The goals of the program are primarily rooted in the goals established by Facilities Services for 2015-16.

#### 2.1 BE EASY TO DO BUSINESS WITH

The Commute Concierge aims to provide excellent customer service by cutting through the complexity of transportation options. We work hard to provide a great context for lower-carbon commuting, but people still find it difficult to access these options due to a lack of confidence and poor perceptions of these modes. Commute Concierge staff work to make it easier to access these options, provide confidence in using these options, and increase positive perceptions of these options.

To evaluate this goal, a series of six questions on the customers' experience will be asked to survey participants.

#### 2.2 CHAMPION ENVIRONMENTAL STEWARDSHIP

To evaluate our progress towards achieving this goal, all customers should be sent a survey within three months of being helped. Champion Environmental Stewardship

The Climate Action Strategy for Transportation proposes incremental annual carbon reductions to help the department achieve carbon neutrality by 2050. The Commute Concierge program aims to foster commuter behavior change towards lower-carbon modes.

To evaluate our progress towards achieving this goal, all customers who complete an online or paper intake form (not those helped in person or over the phone) should be asked to complete a trip diary for the previous week as well as note how many miles they live from campus. They should then be asked these same questions within three months, but no sooner than two weeks, after being helped.

The goal is to reduce carbon for customers helped by 5%.

The goal will be measured by comparing a pre and post Commute Concierge trip diary.

## 2.3 DELIVER COST-EFFECTIVE SERVICES

The Commute Concierge program requires significant resources to maintain. It is important that the service be provided in a cost-effective manner in order to ensure the team continues to utilize its limited resources in an efficient manner.

To evaluate our progress towards achieving this goal, monthly costs should be divided by the number of customers helped that month.

As of March 2015, the Commute Concierge program is running at an estimated monthly cost of \$7033.6/month. This cost is almost entirely staffing – about 70% of the assistant manager’s time and five student staff members that are working a total of approximately 50 hours/week.

Since the launch of the program we have been helping an average of 149 customers per month (1192 customers helped in the first 8 months). Which puts us currently at \$47.2/per customer.

The goal is to keep costs to under \$45/customer.

## 2.4 RETAIN EMPLOYEES AND STUDENTS

The Commute Concierge program is here to help students and employees have any enjoyable commute to and from campus since most UW commuters see their commute as an extension of their overall job or school experience.

## BE EASY TO DO BUSINESS WITH

### INTRODUCTION

Our goal to provide excellent customer service will be measured by surveying customers helped within three months of their interaction with Commute Concierge. The survey will ask six question to measure if we are easy to do business with.

### 3.1 SURVEY IN CATALYST

The survey is hosted in Catalyst.

### 3.2 SURVEY CONTENT

Survey participants should be asked the following questions:

“How did you hear about the Commute Concierge service? Check all that apply and provide exact information if possible.”

- In person (even, orientation, our office, etc.)
- Word of mouth (friend, colleague, classmate, etc.)
- Promotional materials (advertisements, poster, flyer, etc.)
- Online (website, email, social media, blog, etc.)
- Exactly where: \_\_\_\_\_

Goal: This goal can change based on specific outreach projects throughout the year

“How well did the information provided by the Commute Concierge staff help with your commute?”

- Very helpful
- Moderately helpful
- Slightly helpful
- Not at all helpful
- Other: \_\_\_\_\_

Goal: Over 50% of all participants answer either slightly, moderately or very helpful.

“How often do you use the personalized commute plan or information that you were provided?”

- Always
- Often
- Sometimes
- Rarely
- Never

Goal: over 50% of all participants answer either sometimes, often or always.

“How likely are you to recommend Commute Concierge to your friends or colleagues?”

- Very likely
- Somewhat likely
- Somewhat unlikely
- Very unlikely
- No opinion

Goal: Over 75% of all participants answer either somewhat or very likely.

“Please tell us what you enjoyed about your Commute Concierge experience.”

“Please tell us what would have made your Commute Concierge service experience better.”

### 3.3 CONDUCTING THE SURVEY

All customers will receive an email asking them to participate in the survey 90 days after their case has closed in Salesforce. The following email has been approved and is set up to send out in Salesforce:

Subject: Commute Concierge: Tell us what you think

Hi [First\_Name],

Thank you for using UW’s Commute Concierge service. We hope you’ve found a great commute! We want to hear how your commuting experience has been going and get your feedback on how we can better improve our services for you and other UW commuters moving forward.

Please take a few minutes to fill out our survey. As a thank you, we’ll enter you into our quarterly drawing for a \$25 Amazon gift card!

As always, we are more than happy to help with all of your commuting needs. Our staff are available online and in person at the University Transportation Center or over the phone at 206-221-7807 Monday through Friday 9 a.m. to 5 p.m.

Happy commuting,

Commute Concierge Team

<http://transportation.uw.edu/commute-concierge>

ucommute@uw.edu  
206-221-7807

### 3.4 ANALYZING RESULTS

Download results from Catalyst and open in Excel. In the cell below the data in the column with the responses to the question “How likely are you to recommend Commute Concierge to your friends or colleagues?” type in =AVERAGE() with the data highlighted in between the (). Record the results in the spreadsheet: I:\groups\fac\trans\upass\A New File System\Campaigns\Commute Concierge\Evaluation\Commute Concierge Evaluation Tracking

### 3.5 FOLLOWING-UP WITH DISSATISFIED CUSTOMERS

Customers who rated their likelihood to recommend Commute Concierge at 0-5 should receive the following email from the Commute Options Assistant Manager’s account:

Hi <First Name>,

Thank you so much for completing the survey regarding your experience using Commute Concierge. I’m sorry to see that you are unlikely to recommend us to a friend or colleague, and I am emailing you today to learn more about how we could have better served you.

<If they included comments in the survey as to how their experience was good/could have been better, mention these and inquire further as appropriate.>

I would really appreciate any feedback you can provide me, in whatever way is easiest for you—feel free to reply to this email, give me a call at XXX-XXX-XXXX or stop by our office at the [University Transportation Center](#), Monday-Friday, 9am-5pm.

Thank you in advance for helping us make commuting easier for UW students and employees. I hope we can better serve you in the future.

Sincerely,  
Emily Kathrein  
Commute Options Assistant Manager



# CHAMPION ENVIRONMENTAL STEWARDSHIP

## INTRODUCTION

Our goal is to reduce carbon emissions by 5% for Commute Concierge customers.

### 4.1 INTAKE FORM

On the electronic intake form users are required to complete a trip diary as well as record the distance they live from campus. People completing the paper intake form are asked the same questions, and their answers are put into the electronic intake form by Commute Concierge staff.

The trip diary asks: Please tell us how you got to campus last week:

	Day off	Walk	Bike	Transit	Carpool	Vanpool	Drive alone	Telework	Other
Monday									
Tuesday									
Wednesday									
Thursday									
Friday									
Saturday									
Sunday									

This data should be obtained from Business Systems (as on February 2015, Chris Browder was the contact for this).

## 4.2 SURVEY IN CATALYST

The post-assistance survey is hosted in Catalyst.

## 4.3 CONDUCTING THE SURVEY

See section 3.3.

## 4.4 CLEANING UP THE DATA

The operations that you will do in this analysis are to find the average difference in carbon for customers before and after the Commute Concierge. For a more general audience understanding of results, it is also good to capture mode splits for before and after.

You will only be comparing the results for people who completed both surveys. You'll need to clean up the data by removing duplicates and selecting only those who responded to both surveys.

Download results from Catalyst and open in Excel.

Combine the intake form data and the survey data into one workbook.

Go to the intake (before) spreadsheet and insert a column to the right of email address. In the first cell enter “=LEFT(A1,FIND("@",A1&"@")-1)” and replace A1 with the first cell with an email address. Drag and drop this formula down the column. This will leave you with NetIDs.

To remove duplicate responses highlight all of the data and click the tab “Data” and then the button “Remove Duplicates”. Unselect all of the columns except for the one with the NetIDs. Do this to both spreadsheets.

On both spreadsheets insert a column to the right of the columns with the NetIDs (Username on the survey spreadsheet) and enter “=VLOOKUP(A1,Responses!E:E,1,FALSE)” where A1 is the first cell with the NetID (the cell left of the cell you're typing in) and Responses!E:E is the column of the NetIDs on the other spreadsheet. This formula will return “#N/A” for instances in which a customer did not complete a follow-up survey. Highlight this column and select “Sort & Filter” A-Z, and make sure to check the box that says “Expand selection”. You can then delete all the rows with “#N/A”.

## 4.5 MODE SPLITS

To determine mode splits use the COUNTIF function. Create a third spreadsheet and create a table that looks like:

Mode	Before Count	Before Percentage	After Count	After Percentage

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Walk	=COUNTIF(before!G2:M38, before!G6)	=cell to the left/total		
Bike				
Transit				
Carpool				
Vanpool				
Drive Alone				
Total	=SUM(this column)			

Where before!G2:M38 is a highlight of the trip diary and before!G6 is the mode in question (in this example, walk).

Record the results in the spreadsheet: I:\groups\fac\trans\upass\A New File System\Campaigns\Commuter Concierge\Evaluation\Commuter Concierge Evaluation Tracking

**4.6 CARBON**

We only want to count days in which a person worked, not days off. To calculate the number of workdays for each person, in the column after the trip diary, add the formula =COUNTIF(G2:M2, "<>"&\$H\$5) where G2:M2 are the trip diary columns and H5 is a cell that has a "Day off". Drag this formula down to apply to all rows.

Next, you'll want to use Find and Replace to replace all of the modes with their equivalent in grams of carbon per person mile, which are as follows:

- Drive alone: 373
- Carpool: 172
- Vanpool: 62
- Transit: 225
- Walk: 0
- Bike: 0
- Telework: 0
- Day off: 0
- Other (an average of the modes which we have carbon data for): 139

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Then, in the column to the right of the number of workdays, enter the formula  $=(SUM(B4:H4)*A4)/I4$  where B4:H4 are the trip diary, A4 is the miles from home to campus, and I4 is the workdays. Drag this formula to apply to all rows.

On the cell below the last response for this column of carbon, enter the formula  $=AVERAGE(J4:J41)$  where J4:J41 are the carbon cells.

Complete the above work for each of the spreadsheets and then compute the difference between the averages in the third spreadsheet.

Record the results in the spreadsheet: I:\groups\fac\trans\upass\A New File System\Campaigns\Commute Concierge\Evaluation\Commute Concierge Evaluation Tracking

## DELIVER COST EFFECTIVE SERVICES

### INTRODUCTION

Our goal is to keep costs to under \$45/customer.

### 5.1 CALCULATING COSTS

To calculate monthly costs, The Commute Concierge program requires significant resources to maintain. It is important that the service be provided in a cost-effective manner in order to ensure the team continues to utilize its limited resources in an efficient manner.

To evaluate our progress towards achieving this goal, monthly costs should be divided by the number of customers helped that month.

As of March 2015, the Commute Concierge program is running at an estimated monthly cost of \$7,033.6/month. This cost is almost entirely staffing – approximately 70% of the assistant manager’s time and five student staff members that are working a total average of 50 hours/week with an average of four weeks each month.

As of March 2015, monthly costs are as follows:

- Assistant manager (70% of total monthly cost): \$ 4338.6
- Student staff time (hourly rate + \$2.475 overhead X 50hrs X 4 weeks): \$2695
- Total monthly costs: \$7033.6

Since the launch of the program in August 2014 we have been helping an average of 149 customers per month (1192 customers helped in the first 8 months – Aug. 2014 – March 2015).

A customer is defined by the following (additional details in 5.2):

- Someone who submits a case on Salesforce
- Someone who we provide commute concierge services to in person
- Someone who we provide commute concierge services to over the phone

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\*Total number of customers can be found here >

file:///I:\groups\fac\trans\upass\A%20New%20File%20System\Campaigns\Commute%20Concierge\Evaluation\Commute%20Concierge%20Tally%20Tracker.xlsx

Final calculations:

Total monthly program costs:	\$7033.6
Average number of customers helped/month:	<u>149</u>
	\$47.2

As of March 2015 we are spending approximately \$47/per customer.

The goal is to keep costs under \$45/customer.

## 5.2 TRACKING NUMBER OF CUSTOMERS

The number of customers are tracked in the following three ways:

1. Customers who have submitted a request online or filled out a paper intake form. The number of customers helped can be found in the Commute Concierge Salesforce account.
2. The number of customers who walk into or call the Commute Concierge office. This information is being tracked in the following document: I:\groups\fac\trans\upass\A New File System\Campaigns\Commute Concierge\Staff folder\Commute Concierge Phone & In-Person
3. The number of customers who are helped in-person outside the Commute Concierge office. This information is being tracked in the following document (same document as #2): I:\groups\fac\trans\upass\A New File System\Campaigns\Commute Concierge\Staff folder\Commute Concierge Phone & In-Person

Each month the information from the three intake sources is compiled and entered into the following document: I:\groups\fac\trans\upass\A New File System\Campaigns\Commute Concierge\Evaluation\Commute Concierge Tally Tracker

# RETAIN EMPLOYEES AND STUDENTS - TBD

## INTRODUCTION

### 6.1

### 6.2