



Best Workplaces for CommutersSM Phone Forum

Effective Surveying: Best Practices for Assessing Your Commuter Benefits

August 27, 2003

Best Workplaces for CommutersSM

Available exclusively to Best Workplaces for CommutersSM, phone forums provide cutting-edge information on a range of topics related to commuter benefits. Moderated by the U.S. Environmental Protection Agency (EPA), these forums feature experts on key topic areas.

On August 27, 2003, Best Workplaces for CommutersSM held a phone forum to inform employers about best practices for assessing their commuter benefits programs. Julia Rege, EPA forum moderator, provided opening remarks and introduced the featured participants.

Featured Participants

Phil Winters, Center for Urban Transportation Research (CUTR), University of South Florida

Phil Winters, the TDM Program Director for CUTR, focused his comments on the importance of surveying employees on their commuting habits and discussed the primary guidelines for conducting a survey. According to Mr. Winters, the primary reason for conducting a survey is to help employers determine if their commuter benefits program is successful. A survey should do the following:

- Examine the clarity of the program's objectives.
- Redirect efforts when a determination is made that current efforts have not been successful.
- Supply information for both internal and external use.
- Provide evidence for management about the diligence and sincerity of meeting goals.

- Act as a measure against which others can gauge success of commuter benefits programs.

To highlight the accomplishments of an employee benefits program, employers should determine what performance measures should be used when developing a survey. These performance measures can highlight a variety of things, including the number of employees taking advantage of a certain benefit or a change in employee turnover as a result of added benefits.

Two other important factors to consider when developing a survey are the audience for your survey and how the survey results will be used. Information needs can change over time, so it is important to constantly re-evaluate the objectives of the survey. The type of research method used also depends on budget issues, corporate culture, the type of workforce, and confidentiality concerns.

Mr. Winters reiterated that there are a variety of reasons for which you would conduct an employee survey, and, in doing so, it is important to consider all of the factors that might come into play.

Brad Minnis, Juniper Networks, Inc.

Brad Minnis, the transportation manager for Juniper Networks in Sunnyvale, California, discussed the company's process for surveying employees. Juniper Networks moved to Sunnyvale in 2000 and, in signing a lease, agreed to a variety of transportation goals set by the city. Initially, Juniper Networks was required to meet an 18 percent trip reduction rate. Currently, as Juniper Networks opens its third building in Sunnyvale, the company is now required to meet a 22 percent trip reduction rate. If Juniper Networks does not



meet these trip reduction requirements, the city enforces penalties.

Juniper conducted an initial survey to determine employee behaviors and to gauge the company's progress in meeting the initial trip reduction goal. According to Mr. Minnis, the biggest challenge in conducting this survey was getting people to fill out and return the surveys. To encourage employees to complete the survey, Juniper Networks conducted a marketing campaign that included emails, flyers, and an onsite transportation fair. Because Juniper Networks conducts a large amount of business on the Internet, it made perfect sense to provide the survey via the Internet for employees to complete. Juniper Networks used these initial survey results to determine where to focus resources and as an effective tool by which to market its commuter benefits program.

As part of its trip reduction program, the city of Sunnyvale requires its employers to submit an annual survey. Recently, Juniper Networks helped create a transportation association in Sunnyvale—the Moffett Park TMA—allowing the member companies to work together on a combined annual survey. This approach helped Juniper Networks reduce its individual costs for commuter benefits and surveying while also providing area-wide commuter benefits information.

Juniper Networks conducted its annual survey a bit differently than the baseline survey that was previously conducted. This survey was Internet-based, and a significant marketing effort was undertaken to advertise the survey, leading to nearly an 80 percent response rate. Over a week-long period, employees received, via email, a daily reminder of the survey and the progress was tracked daily for response rates. The company also provided employees with incentives to complete the survey, including free lunches and free food at onsite events.

Mr. Minnis also emphasized the importance of the questions that are included in

the survey. Juniper Networks' survey questions focused on how employees are commuting, what the company can do to encourage people to get out of their cars, and what, if any, additional information an employee would like to have. It is important to note in this situation, that if an employee requests additional information, it is crucial that the company follow through and provide the employee with that information. This is critical to provide employees with benefits information and to maintain the credibility of the company's program.

In conclusion, Mr. Minnis reiterated the importance of communicating with employers about a survey and structuring the survey to let employees know more about the company's commuter benefits program.

Sally Carlson-Bancroft, Best Buy Co., Inc.

Sally Carlson-Bancroft is the campus transportation coordinator for Best Buy's Minneapolis/St. Paul area campus. In January 2000, Best Buy made plans to build a new corporate campus that would consolidate nearly 4,000 employees who were dispersed in office buildings around the Minneapolis/St. Paul area. There were a number of traffic concerns associated with this consolidation, and, with the encouragement of the city, Best Buy decided to develop a transportation demand management (TDM) plan.

In August 2000, Best Buy emailed all employees a survey and received approximately 1,300 responses. The local transportation management organization (TMO), Metro Commuter Services, provided the wording for the survey, which included questions about current commute mode and distance, work hours, and whether or not the employee needs the use of a car during the day. The survey results showed that 25 percent of the respondents were very likely to adopt an alternative commute mode. As a result, Best Buy

developed initial targets and determined what types of commuter services could successfully be implemented.

In 2002, Best Buy conducted a second survey to gauge employee interest in bus service and to determine what type of bus services would convince employees to stop commuting in a single occupant vehicle (SOV). Best Buy emailed employees a link to this Internet-based survey, and employees were given 3 and a half months to respond. Best Buy received 250 responses to the survey, and nearly 93 percent of the respondents were interested in trying out the bus service.

In addition to these two surveys, Best Buy has also conducted surveys aimed specifically at certain groups of employees. In May 2002, the company conducted a survey of employees who lived close to the previous worksites. The purpose of this survey was to gauge the interest level in the addition of bus service to the corporate campus. The survey was emailed to 500 employees at a time when anxiety over the campus move was highest, and Best Buy received 283 responses (over a 50 percent response rate). Metro Commuter Services compiled the responses, and based on employee interest, the transit agency added direct bus service to campus. Results from another survey expanded the park-and-ride services that are available to Best Buy employees.

As of May 15, 2003, Best Buy's relocation was complete and 5,300 employees are located at the new campus with nearly 14 percent of those employees using an alternative form of transportation. The surveys that Best Buy has completed were primarily focused on planning commuter services and the next step is to survey employees to evaluate the effectiveness of the commuter benefits program.

According to Ms. Carlson-Bancroft, Best Buy has learned several lessons through its surveying experiences. Best Buy's experience has been that emailed surveys and surveys targeted at specific groups yield higher

response rates. Best Buy also encourages employers to use both internal and external resources to conduct surveys as they had a very positive experience working with their local TMO.

Open Discussion

Following the featured speakers' presentations, other forum participants asked questions and provided additional information on some of the points discussed.

- Crystal Bunch from Research Triangle Foundation asked the speakers if they have any concerns with confidentiality issues. Mr. Minnis responded that employees have the option of not disclosing their name on the survey and emphasized that any survey results are only used internally. Mr. Minnis also indicated that he has not had any employees raise confidentiality concerns to him. Ms. Carlson-Bancroft added that Best Buy's surveys include a disclaimer explaining that survey results are only used to develop additional commuter services.
- Eleonore Price from the Washington State Department of Social and Health Services asked if other employers are dealing with state-mandated commute trip reduction laws as are in place in the state of Washington. Ms. Price explained that, in Washington, employers are required, by 2005, to reduce SOV rates by 35 percent. Mr. Minnis answered by explaining that a former California state law required similar commute trip reductions; however, the law is no longer in place. Juniper Networks is, however, required by the city of Sunnyvale to reach a 22 percent trip reduction rate. Mr. Winters added that Phoenix; Tucson; Los Angeles; Ventura County, California; and Portland, Oregon, all have similar trip reduction requirements. Ms. Carlson-Bancroft indicated that the TDM measures implemented by Best Buy have all been voluntary, and they are interested in expanding their efforts

to Best Buy employees nationwide, including retail employees.

- Ms. Carlson-Bancroft commented that she liked Mr. Minnis' idea to use a survey as a tool to market a commuter benefits program. Mr. Minnis added that survey questions can be tailored to highlight what the commuter benefits program offers in case employees are unaware of the services available to them. Mr. Winters explained that it is not unusual for employees to not know about commuter benefits programs, which clearly illustrates the importance of a high level of awareness and the inclusion of such information in a survey.
- Mr. Minnis commented that it is important to understand the individuals you are surveying to get better responses.
- Patty Klavon from EPA asked the number of people employed by Juniper Networks. Mr. Minnis answered that Juniper Networks has 2,000 employees nationwide, with 900 in Sunnyvale and others around the country, including the Boston and Washington, DC, areas. He also indicated that he coordinates commuter benefits for the company nationwide.
- Mr. Minnis also emphasized the importance of TDM programs in the global marketplace as worldwide customers often ask what types of activities the company participates in to protect the environment.
- Julia Rege from EPA asked Mr. Winters what might be a typical response rate that a company could expect to receive. Mr. Winters indicated that EPA's suggested response rate of 70 percent is often very difficult to meet because it is challenging to get people to respond, especially if employees have confidentiality concerns. He emphasized that his typical response rate ranges from 25 to 40 percent.
- Patrice Thornton from EPA asked all of the employers on the call how EPA can better assist them with the surveying

requirement. Mr. Minnis indicated that the samples provided by EPA are helpful. Eleanor Price from the Washington State Department of Social and Health Services indicated that the state of Washington uses a standardized form for all employers that, when completed, is sent to University of Washington statisticians for evaluation. Mr. Minnis indicated that the city of Sunnyvale asks employers only for summary information rather than the completed survey forms. Mr. Winters indicated that, especially with smaller employers, it is very difficult to meet the response rates set by EPA. He commented that it might be useful to consider treating non-respondents as drive-alone employees if the expected response rate is not met. Mr. Minnis added that California treats non-respondents as drive-alone employees.

Closing

Julia Rege closed by thanking the featured participants for their presentations and thanking the employers for participating in the forum. Ms. Rege indicated that EPA will send out a summary of the forum to employers and post it on the Best Workplaces for CommutersSM Web site. An audio recording of the phone forum will also be posted on the Web site at <www.bwc.gov>. Employers who have additional questions and feedback, including ideas for upcoming phone forums, can contact EPA at <bwc@epa.gov>.