Wayfinding Program Development
Final recommendations report
November 2015

City of San Jose and Knight Foundation
Prepared by City ID

Introduction

Project aims

The Program Development Phase funded by Knight Foundation and commissioned by the City of San Jose (CoSJ) lays the foundation for a permanent wayfinding system in San Jose. Increasingly, transit modes and the systems that explain them, must be integrated to enable and encourage seamless journeys. This project seeks to develop a versatile and flexible 'information brand' to improve the quality and consistency of information – harmonizing the end-to-end journey experience.

The deliverables from this first phase provide a detailed program of projects and recommendations to deliver visible and meaningful changes within the next five years. The program will start with the implementation of pilot projects in the first year to create a more walkable downtown.

The wayfinding system will be developed, planned and executed in a way that responds to the unique characteristics, opportunities and challenges in San Jose. This includes the processes for commissioning, managing and maintaining the system, which must be tailored to the individual roles of CoSJ, VTA and MTC and other delivery partners.

This document

This document has been structured to focus on a pragmatic process for developing and delivering projects over the next few years.

The document sets out:
_A new family of wayfinding components for San Jose
_Key recommendations
_Immediate priorities
_Year 1, 2 and 3-5 program of projects
_Project commissioning considerations

Program development stages

The following three stage process has led to overwhelming support for the wayfinding program and provided valuable insight that has informed the recommendations in this document.

Stage 1

The workshops in July, hosted by SPUR, involved a wide range of stakeholders in a process of Walk Audits to understand the opportunities and challenges that exist for improving the walkability, connectivity and legibility of San Jose.

Walk Audits were designed to involve stakeholders in the first stages of the project and to inform the program development process. It became clear, the value of wayfinding in Downtown San Jose is well understood by many and a range of suggestions and initial ideas for how to develop a comprehensive wayfinding system were discussed.

For more information, see:
Walk Audit_capture.pdf

Stage 2

During Stage 2, City ID worked in downtown San Jose from September 21 to October 2. The team worked closely with the City of San Jose, the Knight Foundation and SPUR to evolve the concept for permanent wayfinding and presented ideas back to stakeholders through a series of workshops.

Attendees strongly agreed that there is a unique opportunity at this time to coordinate existing improvements and downtown projects to deliver a user-centered, world-class and innovative wayfinding system.

For more information, see:
Workshop 2_capture.pdf

Stage 3

This stage concluded early in November with a series of presentations outlining key recommendations and round table discussions on how the program will be delivered.

Key recommendations and major opportunities were discussed, providing direction for the continued and sustained development of a comprehensive wayfinding system for San Jose over a three to five year period.

Refined goals

A key output of the workshops was the agreement of the program goals that have guided the recommendations that follow.

1. Create a walkable downtown at the heart of a more sustainable movement network

2. Anticipate and prepare for a changing downtown and changing demographics

3. Communicate and enhance active, urban, and distinctly Californian lifestyle choices

4. Develop the city's place-values and unique sense of identity

5. Forge long-term partnerships for efficient and effective delivery

A new family of products for San Jose

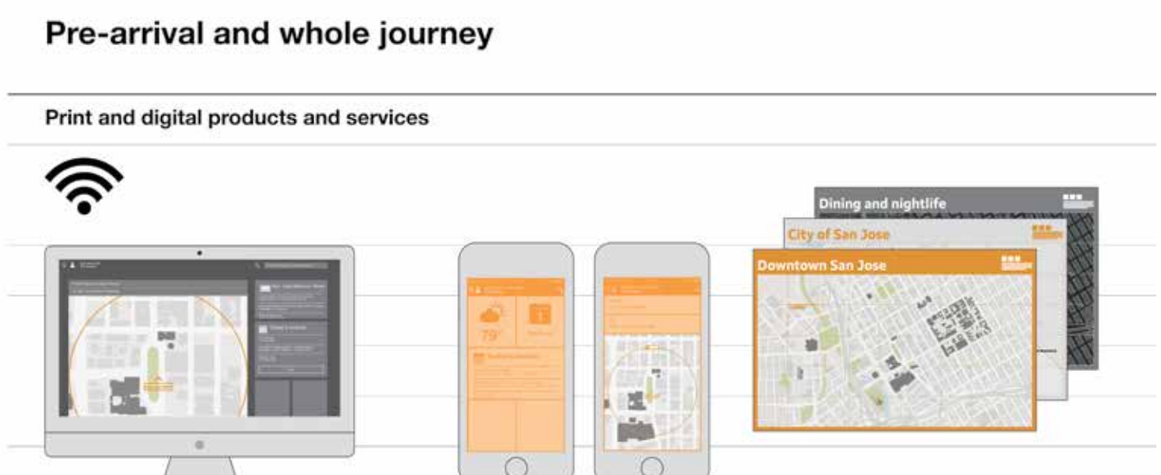
System components

A resident's or visitor's journey to and around downtown San Jose should be informed and enhanced by a range of different information types. A new suite of information components has emerged through stakeholder workshops that incorporates on-street, printed and digital formats, as well as information that applies to all transit modes. These components will be designed with a consistent visual identity to harmonize and seamlessly integrate transit services.

The full range of components is illustrated on the following pages, to provide a focus for program planning and delivery. These illustrations do not represent designed products, but provide an initial specification based on ergonomic and functional factors. These components provide the focus for a range of short, medium and long-term projects described on the following pages.

An extendible system

Whilst the initial focus for implementation will be Downtown San Jose, the range and application of components could be extended to harmonize journeys across the wider city, Santa Clara County and the Bay Area.

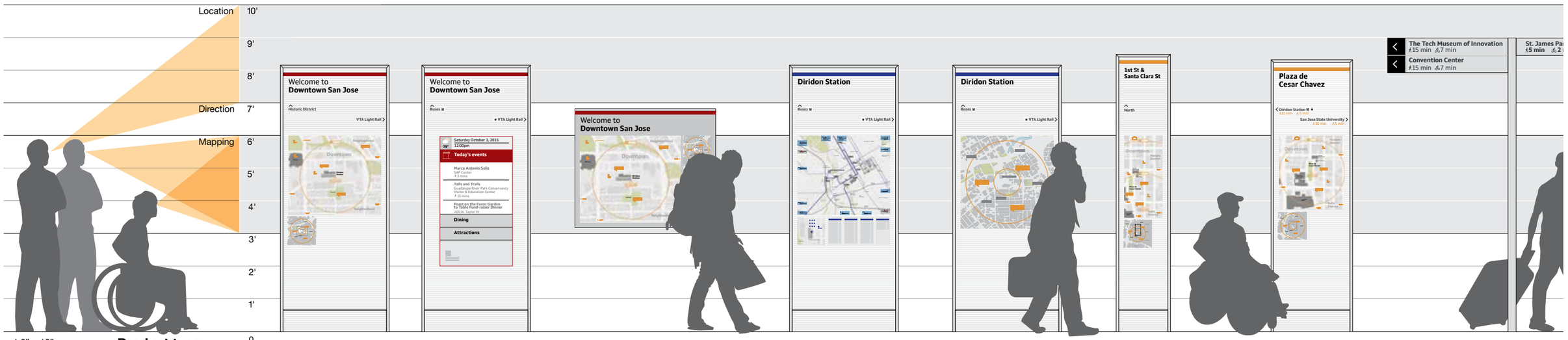


Components	Vistor websites	Mobile services	Print maps
Product reference	01 Official Visitor website and partner website improvements	02 Official Visitor app/mobile website	03 Official Visitor print maps and partner print map improvements
Format/platform	Website	Mobile devices	Various print formats Visitor information centers
Function	Visitor information Event information Journey planning	Visitor information Event information Journey planning	Visitor information Event information Overview of downtown Journey planning
Information types	Visitor guides Events calendar Journey planner Interactive map	Visitor guides Events calendar Journey planner Interactive map	City-wide map Downtown map Activity cluster maps

On-street products and services

On arrival

En route

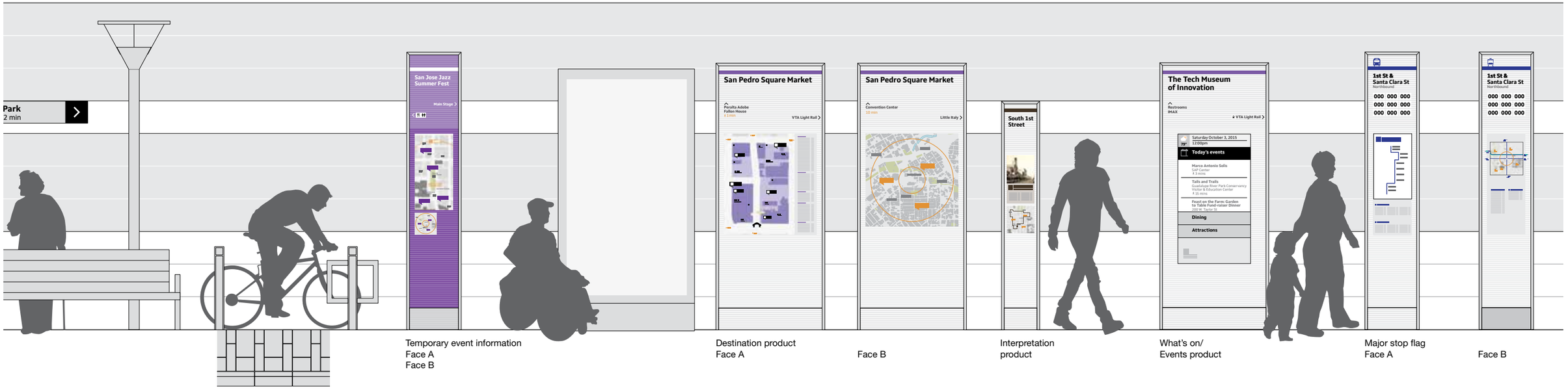


1.2" = 12"
10% scale

Product type	Arrival totems Face A	Arrival totems Face B	Arrival product (wall-mounted)	Interchange product Face A	Interchange product Face B	Route map product Face A	Route map product Face B	Area map product Face A	Area map product Face B	Directional product
Product reference	04 Arrival products – Freestanding (Static and Interactive)		05 Arrival products – Wallmounted (Static)	06 Transit hub products		07 Route products (Static)		08 Area products (Static)		09 Directional products – post and v (Static)
Position/Location	At airport Major rail and coach stations		Major parking lots	Major light rail/bus hubs		Primary pedestrain routes		Secondary pedestrain routes		Tertiary pedestrain routes
Function	Welcome Overview of downtown Detail of area		Welcome Overview of downtown Detail of area	Overview of transit network Overview of downtown Detail of near-by transit stops		Overview of route ahead Overview of downtown		Overview of local area Overview of downtown		Confirm direction where there are po or a distance between map based pr
Information types	Locator Welcome Directions/journey times Downtown map Area map		Locator Welcome Directions/journey times Downtown map Area map	Locator Downtown map Network diagram Area map		Locator Directions/journey times Route map Downtown map		Locator Directions/journey times Area map Downtown map		Directions/journey times

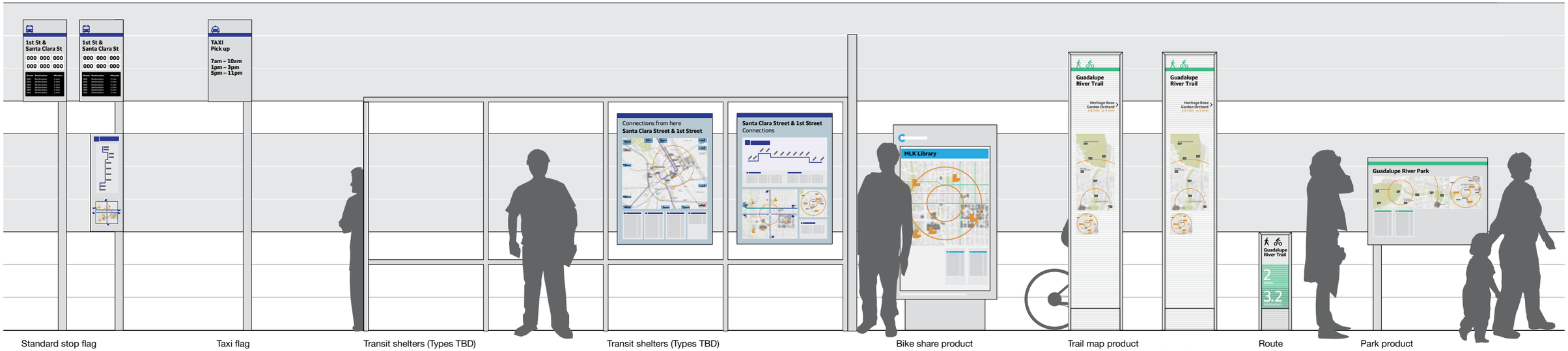
System components

	At destination			At transit stop	



	Temporary event information Face A Face B	Destination product Face A	Face B	Interpretation product	What's on/ Events product	Major stop flag Face A	Face B
10 Unified street furniture and pallette (Types TBD) Seating, lighting, barriers, planting, surfaces etc.	07 Event (Static)	11 Unified advertising displays (Static and active)	12 Destination products (Static and Interactive)		13 Interpretation products (Static)	14 What's on display (Active)	15 Major stop product (Static/Active)
Primary pedestrain routes	Primary pedestrain routes	Primary pedestrain routes	Selected activity areas		Selected points of interest	Selected locations	All light rail stops BRT stops
Give status to primary routes Provide improved walking facities Encourage dwell time Improve coherence of route	Event specific info Overview of route ahead Overview of downtown	Give status to primary routes Create revenue for project	Detail of activity areas Finding specific destinations		Historical information	Event's information	Route information Next bus information Transfer information
Directions/journey times	Locator Directions/journey times Route/event map Downtown map	Advertising Event promotion	Locator Directions/journey times Destination map Downtown map Directory		Locator Trail reference Map/image Description	What's on headlines Events Calendar	Locator/services Route map RTI display Transfer map Fare information

	At bike share	On/accessing trails	At Park
			



Standard stop flag Face A	Taxi flag Face A/B	Transit shelters (Types TBD)	Transit shelters (Types TBD)	Bike share product	Trail map product Face A	Face B	Route marker	Park product
16 Standard stop product (Static/Active)	17 Taxi product (Static/Active)	18 Transit shelters (Optional integratedactive RTI display)	19 Shelter poster cases and posters	20 Bike share kiosks	21 Trail product		22 Trail marker	23 Park product
All standard stops	All taxi standards	Selected transit stops	Selected transit stops	All nike share kiosks	Trail access points		Periodically on trail	All major parks
Route information Next bus information Transfer information	Locator/services Fare information	Locator/services	Route information Next bus information Transfer information	Overview of bike routes and facilities Summary of payment details	Overview of trail Points of interest		Trail information	Overview of park, facilities and activities
Locator/services Route map RTI display Transfer map Fare information	Fare information	Fare information	Locator/services Route map Transfer map Fare information	Downtown bike map Regional bike map Payment/pricing details	Route map City map		Trail name Distance	Park map Area map Park information

Key recommendations

1. Design and build a modular and extendible system

To create a more seamless experience for visitors and residents in San Jose, it is recommended that a modular and extendible wayfinding system is developed.

This is an ambitious goal requiring a significant amount of planning and partnership working. It is recommended that the City of San Jose and its partners focus on delivering priority components in the short term, whilst ensuring extendibility for the long term. By carefully planning with partners and agreement upon roles, responsibilities and future opportunities, it is possible to create a sustainable long-term program for all involved. System components can be organized as follows:

Core component – wayfinding for pedestrian navigation within downtown

Extended range – arrival, destination and trail based wayfinding. Includes street name plates and visitor interpretation

Transit range – Includes all public transit information products and services

Complimentary range – Other street furniture and amenities.

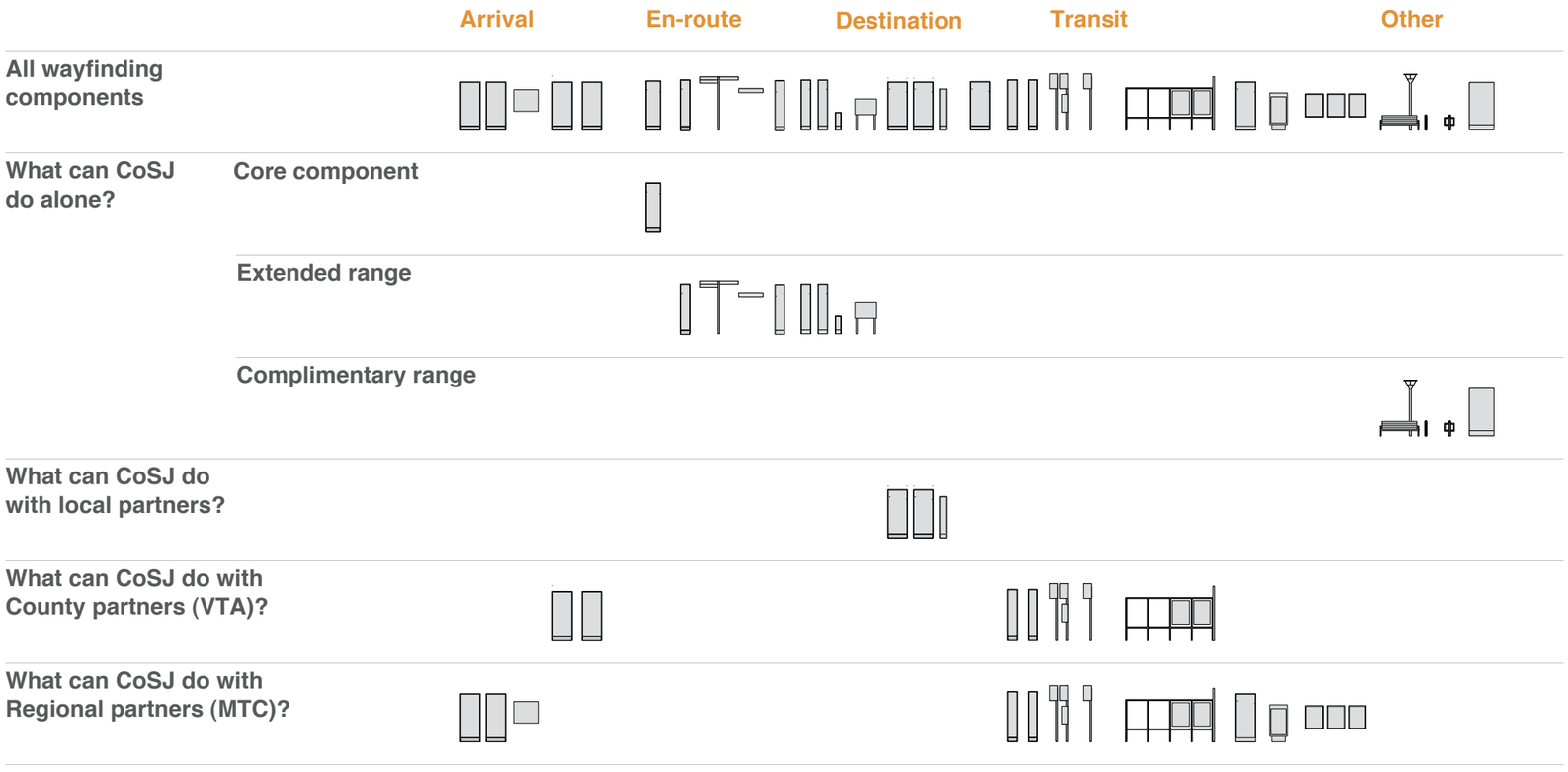


Diagram shows how a comprehensive, unified system of products could be delivered by identifying lead partners, roles and priorities.

2. Implement with your partners

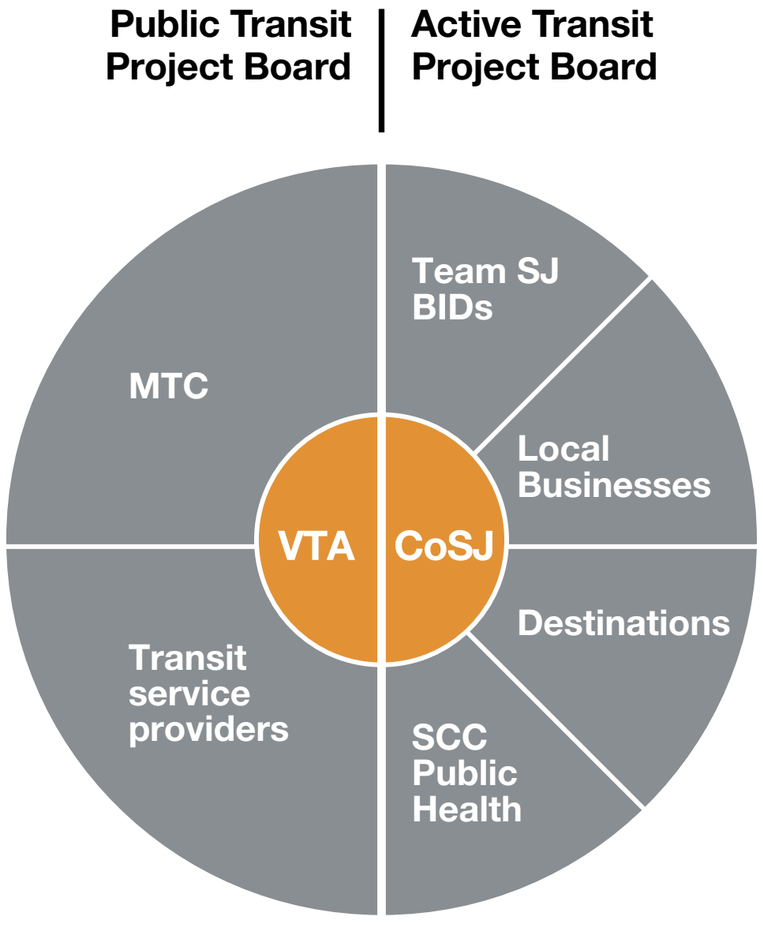
It is recommended that two Way2SJ Project Boards are established to support a partnership approach to delivery and to guide the long-term delivery of the project.

City of San Jose (CoSJ)
It is recommended that the CoSJ should be a lead partner focusing on the delivery of wayfinding within downtown.

The CoSJ will work collaboratively with VTA, Team San Jose, San Jose State University and other local partners in evolving a core range of wayfinding products.

Valley Transportation Authority (VTA)
It is suggested that the VTA should be a lead partner focussing on the delivery of improved transportation information as part of the system upgrade and re-configuration.

VTA will work collaboratively with CoSJ and MTC. Where necessary, VTA will involve other regional authorities and service providers to integrate all transit modes.



Active Transit wayfinding project board

Led by the CoSJ, a Active Transit wayfinding project board to include VTA and other key partners should be established immediately and meet monthly.

The Project Board will report on progress, identify opportunities and make strategic recommendations to the Mayor and gain Mayoral approval or direction on key project decisions.

Public Transit wayfinding project board

Led by the VTA, a transit wayfinding project board to include the CoSJ should be established immediately and meet monthly.

The Project Board will report on progress, identify opportunities and share information across various transport agencies.

Key recommendations

3. Work smarter by sharing resources

When reviewing all the different types of information that are available in and around San Jose, it is clear that there is much duplication of effort and spending due to the number of information providers and the lack of shared design resources.

A key recommendation is that project partners should identify common design resources that can be shared and those which should be unique to their individual needs and purposes.

All partners will then benefit from the ongoing investment and growth of the system.

The diagram opposite describes a model for sharing common elements between partners in order to improve the consistency, coherence and quality of information.

Shared by all
_Mapping resources
_Content and nomenclature
_Planning guidance
_Product specifications (minimum requirements)

Regional Transit (MTC)
_Transit data
_Transit identities
_Transit color function

County Transit (VTA)
_Transit data
_Transit identities
_Transit color function
_Transit identity elements
_Transit product formats and templates

City Wayfinding (CoSJ, other Municipalities)
_Detailed city data
_City identities
_City identity elements
_City product formats and templates

The key: unlocking potential
This diagram demonstrates how resources will be shared by multiple project partners where possible and will be developed for individual existing and future partners where appropriate.

4. Achieve economies of scale

With a comprehensive system of wayfinding components that share common design features, materials and build structures, it will be possible to achieve economies of scale.

Partnerships between CoSJ, VTA and MTC on various projects will provide opportunities to improve the journey experience of the city and wider region in a more cost effective manor.

Key opportunities include:

_The arrival of BART at the heart of the VTA network in San Jose, which is expecting to trigger a major review of local transit networks, bus infrastructure and information.

_The planned upgrade of 800 bus stops, 5 light rail stops, and all advertising products across the Santa Clara County.

These significant opportunities will ensure that partners can deliver cost effective incremental improvements over a phased development and implementation period.

Optimized solutions

As well as cost benefits, a shared design language will allow for designs that are:

_Fit for purpose – designed for optimal functionality including the primary information functions as well as inclusivity and ergonomics

_High quality – produced to a higher standard than off the shelf options

_Unique – a look and feel that reflects place

5. Deliver in phases

In order to achieve impactful solutions in the short to medium term, it is recommended that each phase focuses on the activities required to deliver a defined product or service – whilst contributing towards, and benefiting from, an ever-growing system of parts and resources.

This approach deliberately places a greater onus on initial priority projects that have been selected to develop and test design principles, standards and resources, that future projects will draw upon.

This means that for each component, there will be a process of:

1. Project development
2. System planning
3. System design
4. Project delivery
5. Project management

A higher level of investment will be required in the first few years, but as the project evolves and extends, more resources will be available and so the level of investment in design development will decline.

Priorities

Project planning

As a first step, CoSJ and VTA must review this document and develop a detailed priority program and cost plan.

An appointed Project Manager for both CoSJ and VTA should identify and define potential incomes and expenditures by project stage covering the first year period in detail and the next four years in summary.

This should include a review of existing funding budgets and identification of other potential sources for longer term delivery as defined in more detail on the following pages.

Key to this will be agreeing on procurement routes for design services and brief development for project phases.

Super Bowl

In advance of the Super Bowl weekend in February 2016, a pilot project is planned to attract people downtown while visiting the city. Volunteers are planned to be on site to hand out maps of downtown San Jose and assist with directions and event information.

A special print map of downtown San Jose with selected attractions and Super Bowl related areas and events will be produced. Additionally, this can be accompanied by several large-scale temporary exhibition maps for orientation purposes at major destinations.

The outputs of this project should be evaluated to understand the benefits of this project and to capture user feedback that will inform the permanent wayfinding program.

Outputs:
_100,000 tear-off maps

Budget costs:
_Design development: $40K
_Print production: $10K – 20K

Scoping City User Interface

A key part of the system will be the 'City User Interface' – a city information resource and brand – to seamlessly integrate city transportation, destinations and associated information services. The city user interface would help harmonize the user experience across journey stages (end-to-end), journey modes (with the walking experience being the link between all modes), communication channels (analogue and digital) and media (signs to print to mobile).

This stage of work is fundamental to the delivery of the program. It will define, plan and prototype the overall system architecture as well as the component parts of the interface including: a unique visual identity, data and mapping resources (mapping suite, engine, and portal), design tools and standards. This work would help transition the ideas and concepts to a fully prototyped 'proof of concept' stage.

Possible funding partners:
_Knight Foundation, CoSJ, MTC
_Private sector partners

Budget costs:
_Scoping and system architecture: $155K

Priorities

Wayfinding priorities

Downtown San Jose comprises of a dense grid of walkable streets. The quality of sidewalks is high and public transportation intersects many of the major pedestrian corridors. Secondary corridors, like the various Paseos, add to this network and link pedestrians to the major destinations downtown.

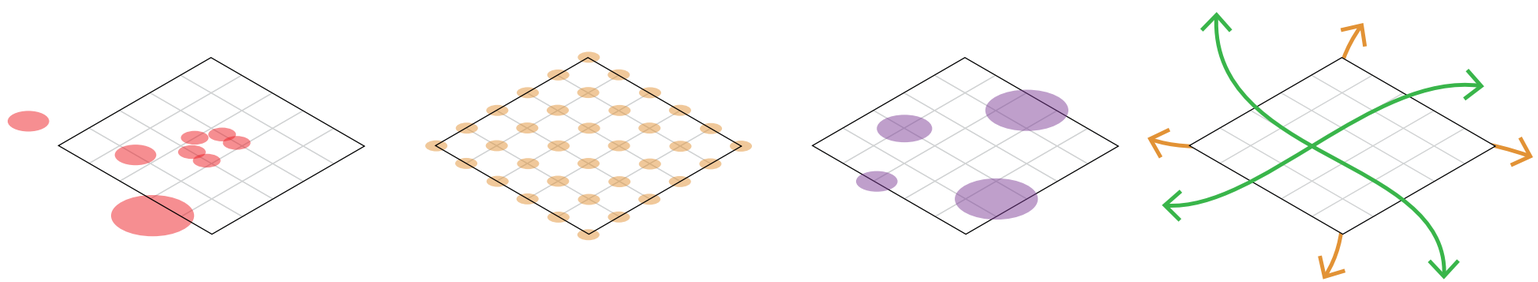
However, pedestrian flow in downtown San Jose is relatively low, and current wayfinding systems are either confusing or have significant gaps. A priority of this program will be to create a “mesh” network of core wayfinding products at key intersections . Alongside this, opportunities to improve transit systems will be developed within the first phase of the project.

Future phases will then have a strong foundation for expansion - beyond the downtown area as well as into other environments such as the trail networks and public transportation systems.

On-street core system concept

Walk
Ride
Play

Welcoming and engaging
Reliable and predictable
Pushes and pulls to activity



Arrival and transfer	At intersections	At and within hotspots	Trails and corridors
Orientate and plan _Overview map _Transfer maps	**Navigate and connect** _Directions _Area map _Overview map	**Find and discover** _Destination map _Directory _Interpretation	**Follow and play** _Route map _Overview map _Activity information

Priorities

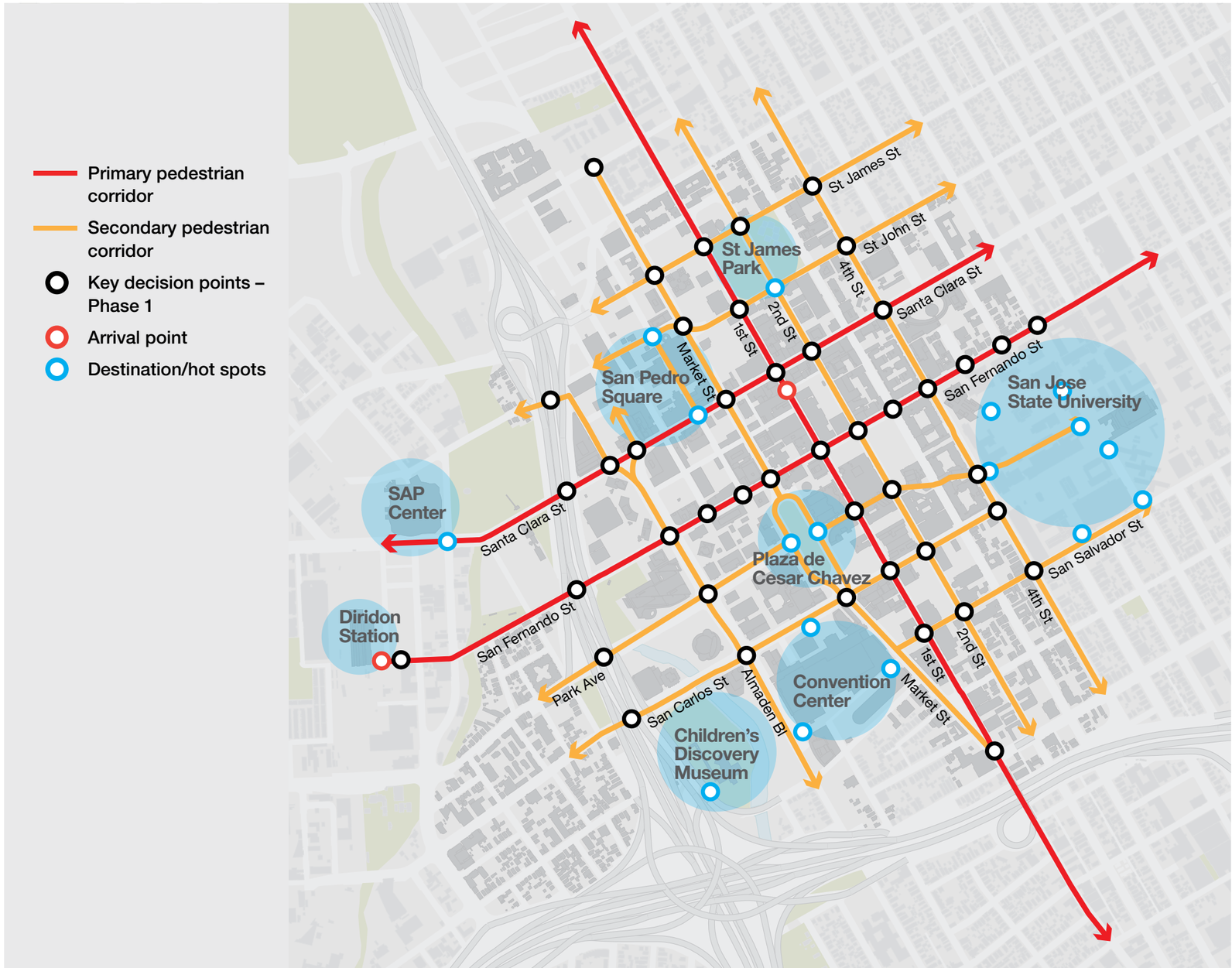
Pedestrian wayfinding priorities

In order to encourage pedestrian movement and highlight the existing network, a “mesh”-like system of wayfinding is proposed for each major node in downtown San Jose. Additionally, a series of products at select destination and arrival points will be layered on top to provide more detailed wayfinding at these key gathering areas.

Future expansions may include finger posts at minor decision points, connectors in between nodes and towards other neighborhoods, and other wayfinding structures beyond the downtown region. Future phases may also develop the wayfinding system specifically for unique environments and special features of San Jose such as the trail network or parks.

Estimated quantities in downtown area

_60 Navigation products for the ‘Mesh’ network
_5 Orientation products at arrival points
_15 Finder products at destinations/ hotspots



Priorities

Transit wayfinding priorities

Upcoming transit improvements led by MTC and VTA present a unique opportunity to incorporate improved wayfinding into the larger public transportation network. Currently, this includes plans for updated bus shelters in downtown San Jose.

The future BART expansion will also be considered in future phases and may present another significant opportunity for greater transit integration and improved wayfinding.

By linking these networks with a consistent and comprehensive wayfinding system in the downtown region, pedestrians will have greater confidence in transferring from one system to the other.

Estimated quantities in downtown area

Within downtown core area:
_70–80 bus stops total
_50 bus flags
_30 bus totems
_30 bus shelters
_10 light rail stops (future phase)

Program development

Program of projects

Based on the recommendations and priorities described in this document, this section identifies 20 projects. Priority projects can be started immediately and delivered within the first two years. The overall program of projects may span a five year period. The project descriptions and schedule opposite are provided as a guide in response to discussions with the client team during this phase of work and should be reviewed and adjusted periodically as the system develops.

The costs identified in this section are based on the consultant team's experience of developing and delivering projects of this kind both in the US and internationally. These costs are provided as a budgetary guide and should be refined through the development process.

Year 1 program:

Year 2 program

Year 1 & 2 summary

Year 3-5 summary

Indicative program schedule

	Projects	2015		2016												2017												2018												2019											
		N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
	Client tasks																																																		
0.1	Program Management																																																	
0.1	Program Planning																																																	
	Immediate tasks																																																	
0.1	Program planning																																																	
0.2	Super Bowl Print Map																																																
0.3	Scoping City User Interface																																																
	Year 1 start tasks																																																
1	Core Downtown Wayfinding Phase 1 (The Mesh)																																																
2	Downtown Transit Phase 1																																																
3	Arrival/departure Points																																																
4	Destination/hotspot Points																																																
5	Downtown and City Region Print Maps																																																
	Year 2 start tasks																																																
6	Core Wayfinding Phase 2																																																
7	Wider Downtown Transit Phase 2																																																
8	BART Station Prototyping																																																
9	Digital Strategy																																																
10	Extended Wayfinding Phase 3																																																
11	Bike Share Integration																																																
	Year 3– 5 start tasks																																																
12	Visitor Website and App Development																																																
13	Wi-fi Interface																																																
14	Transit Phase 3 (Including light rail)																																																
15	Unified Street Furniture																																																
16	Advertising																																																
17	Parking Lot Arrival Information																																																
18	Temporary Information Toolkit																																																
19	Digital Toolkit for Third Parties (Portal)																																																
20	Interactive On-Street Wayfinding Products																																																

Year 1 program | Project 01

TITLE
Core Downtown Wayfinding Phase 1
Mesh network

PRODUCT TYPE
Navigation product

OUTPUT
Design and delivery

CLIENT LEAD
City of San Jose

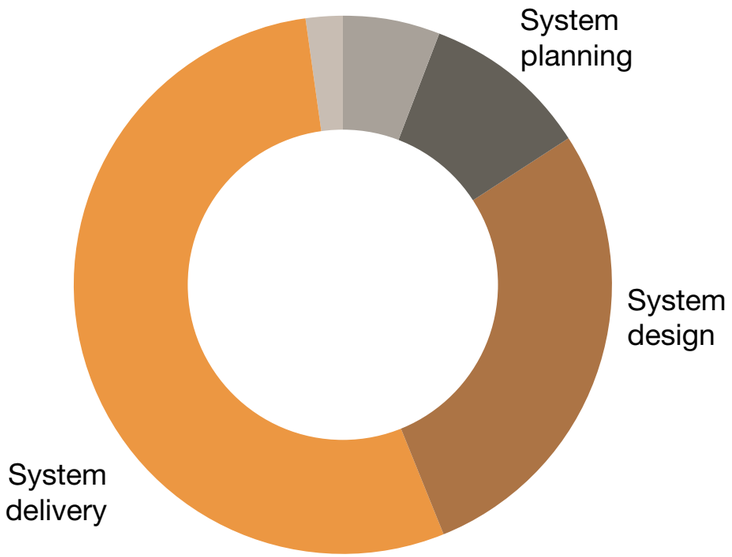
PROJECT PARTNERS
Partnership group

DURATION
12 months

QUANTITIES
20 products for the ‘Mesh’ network (estimated)

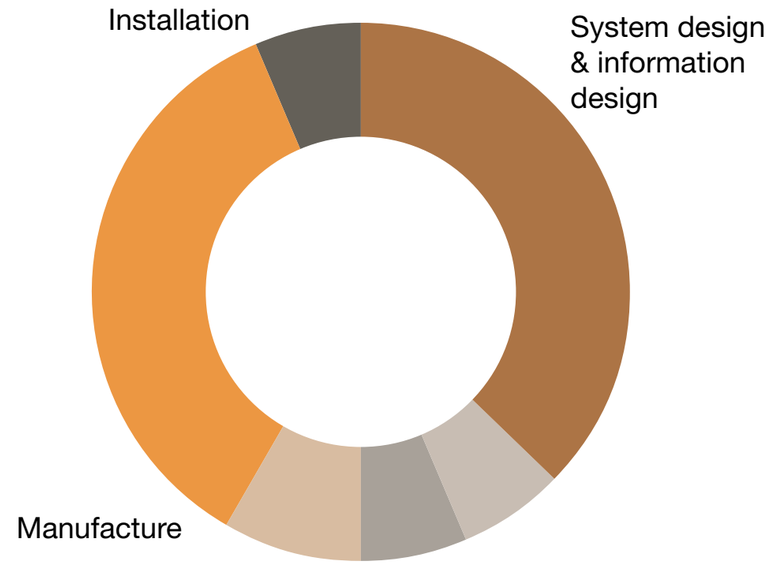
Task	Description	Roles	Total
1.1	**Project management** _Meetings, presentations and client support _Reports and outputs _Procurement support	CoSJ System Designer	**$60K**
1.2	**System planning** _Conceptual system development _Detailed Information and product type specifications _Information planning and system architecture _Network and location planning _Nomenclature and content planning	System Designer Information Designer	**$105K**
1.3	**System design** _Detailed information design _Visual identity development _Development of identity resource _Map base design _Product design	System Designer Information Designer Specialist Designers Cartography Designer Industrial Designer	**$290K**
1.4	**System delivery** _Production artworking _Detailed product design _Prototyping _Manufacture _Installation	System Designer Information Designer Industrial Designer Manufacturer Installation Engineer	**$547K**
1.5	**System management** _Design standards and guidance _Engagement and communication _Monitoring and support	CoSJ System Designer	**$18K**
		TOTAL	**$1,020K**
		Plus 20% contingency	**$1,224K**

Summary of spend by task



Project development	6%
System planning	10%
System design	28%
System delivery	54%
System management	2%

Summary of spend by role

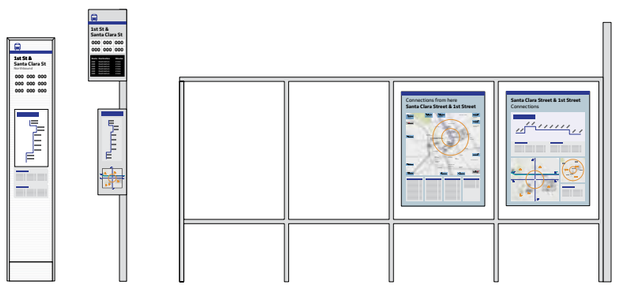


System Designer & Information Designer	35%
Specialist Designers	6%
Cartography Designer	6%
Industrial Designer	8%
Manufacturer	33%
Installation Engineer	6%

Year 1 program | Project 02

TITLE
Core Downtown Transit – Phase 1

PRODUCT TYPE
Priority bus transit products



OUTPUT
Design and delivery

CLIENT LEAD
City of San Jose and VTA

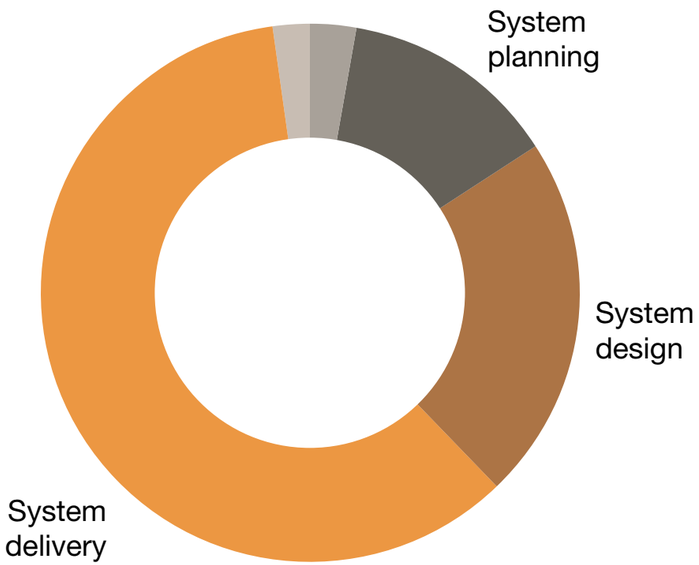
PROJECT PARTNERS
Partnership group

DURATION
12 months

QUANTITIES
Within downtown core area:
_10 bus flags (product/info)
_10 bus totems (product/info)
_10 bus shelters (product/info)
_Active/interactive TBC

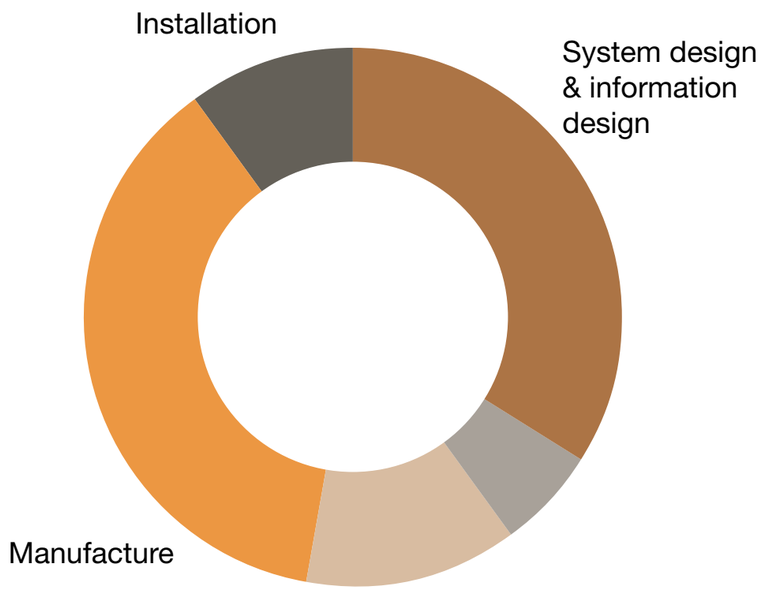
Task	Description	Roles	Total
2.1	**Project development** _Meetings, presentations and client support _Reports and outputs _Procurement support	VTA System Designer	**$45K**
2.2	**System planning** _Conceptual system development _Detailed Information and product type specifications _Information planning and system architecture _Network and location planning _Nomenclature and content planning	System Designer Information Designer	**$190K**
2.3	**System design** _Detailed information design _Visual identity development _Development of identity resource _Map base and transit diagram design _Product design	System Designer Information Designer Cartography Designer Industrial Designer	**$320K**
2.4	**System delivery** _Production artworking _Detailed product design _Prototyping _Manufacture _Installation	System Designer Information Designer Industrial Designer Manufacturer Installation Engineer	**$860K**
2.5	**System management** _Design standards and guidance _Engagement and communication _Monitoring and support	System Designer Industrial Designer	**$34K**
		TOTAL	**$1,449K**
		Plus 20% contingency	**$1,738.8K**

Summary of spend by task



Project development	3%
System planning	13%
System design	22%
System delivery	60%
System management	2%

Summary of spend by role

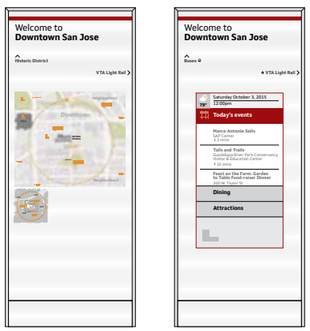


System designer & Information designer	34%
Other design specialisms	0%
Cartography designer	6%
Industrial designer	13%
Manufacturer	37%
Installation Engineer	10%

Year 1 program | Project 03

TITLE
Arrival Points

PRODUCT TYPE
Orientation product



OUTPUT
Design and delivery

CLIENT LEAD
City of San Jose and partners

PROJECT PARTNERS
MTC, CalTrain, Greyhound

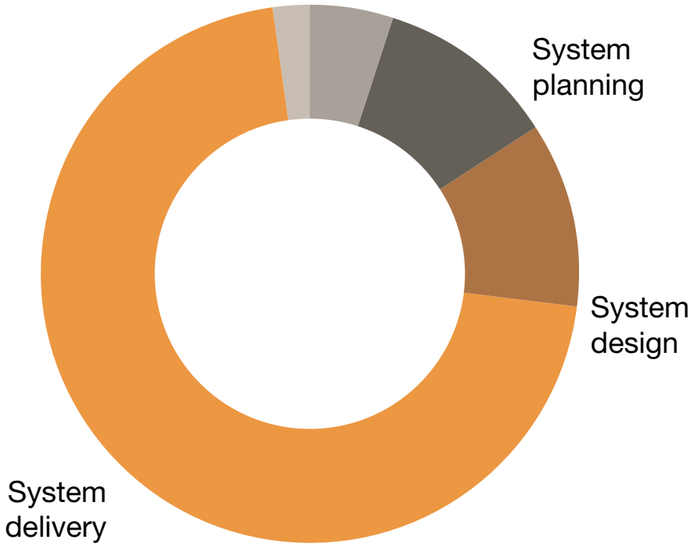
DURATION
9 months

QUANTITIES
_5 static products (estimated)

NOT COSTED
_Development and integration of digital interface or displays

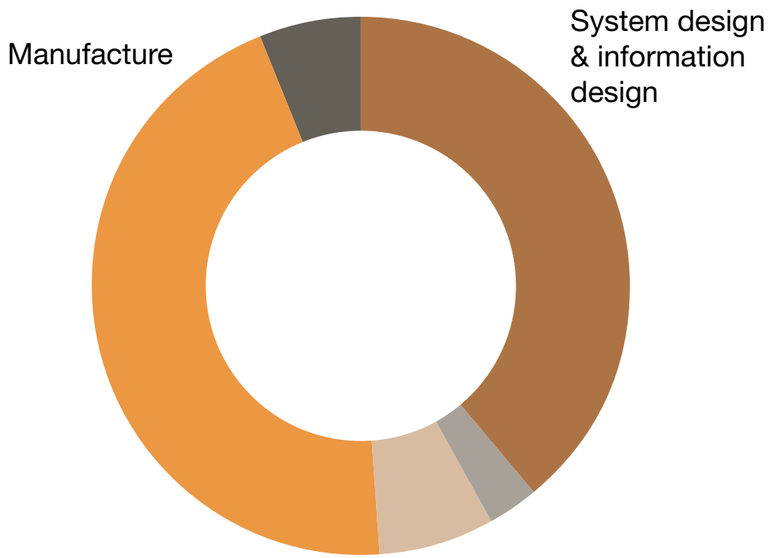
Task	Description	Roles	Total
3.1	**Project development** _Meetings, presentations and client support	CoSJ and partners System Designer	**$11K**
3.2	**System planning** _Detailed Information and product type specification _Information planning and system architecture _Network and location planning _Nomenclature and content planning	System Designer Information Designer	**$22K**
3.3	**System design** _Detailed information design _Map base design _Product design	System Designer Information Designer Cartography Designer Industrial Designer	**$22K**
3.4	**System delivery** _Production artworking _Detailed product design _Manufacture _Installation	System Designer Information Designer Industrial Designer Manufacturer Installation Engineer	**$148K**
3.5	**System management** _Design standards and guidance _Engagement and communication	System Designer Industrial Designer	**$4K**
		TOTAL	**$207K**
		Plus 20% contingency	**$248.4K**

Summary of spend by task



Project development	5%
System planning	11%
System design	11%
System delivery	71%
System management	2%

Summary of spend by role

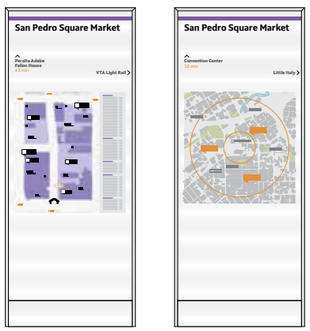


System designer & Information designer	30%
Other design specialisms	0%
Cartography designer	2%
Industrial designer	5%
Manufacturer	48%
Installation Engineer	15%

Year 1 program | Project 04

TITLE
Destinations/Hot spots

PRODUCT TYPE
Finder product



OUTPUT
Design and delivery

CLIENT LEAD
City of San Jose and partners

PROJECT PARTNERS
Convention Center, San Jose State University, San Pedro Square

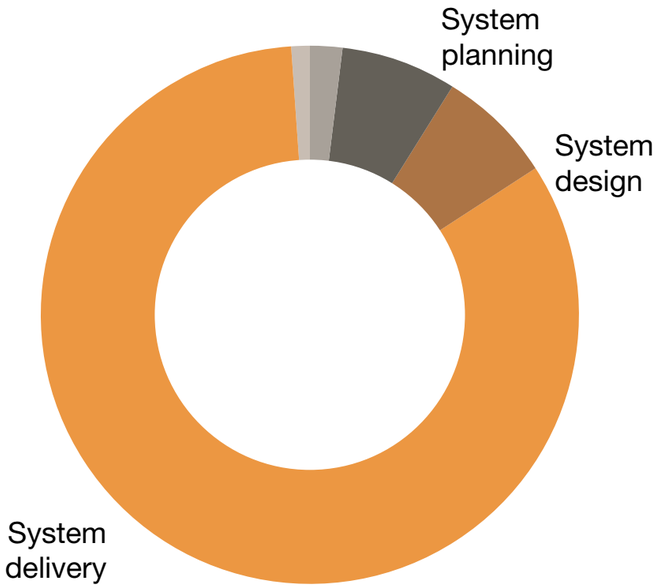
DURATION
9 months

QUANTITIES
_15 static products (estimated)

NOT COSTED
_Development and integration of digital interface or displays

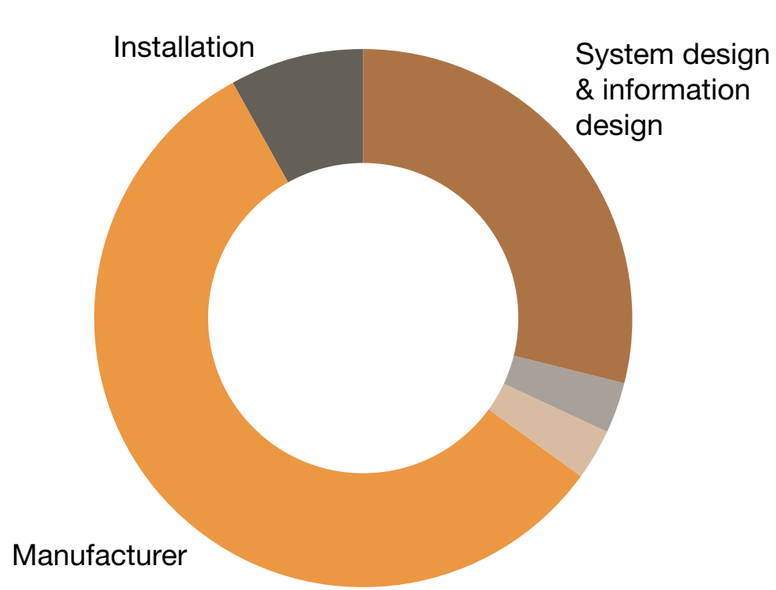
Task	Description	Roles	Total
4.1	**Project development** _Meetings, presentations and client support	CoSJ and partners System Designer	**$13K**
4.2	**System planning** _Detailed Information and product type specifications _Information planning and system architecture _Network and location planning _Nomenclature and content planning	System Designer Information Designer	**$35K**
4.3	**System design** _Detailed information design _Visual identity development _Development of identity resource _Map base design _Product design	System Designer Information Designer Cartography Designer Industrial Designer	**$37K**
4.4	**System delivery** _Production artworking _Detailed product design _Manufacture _Installation	System Designer Information Designer Industrial Designer Manufacturer Installation Engineer	**$428K**
4.5	**System management** _Design standards and guidance _Engagement and communication	System Designer Industrial Designer	**$4K**
		TOTAL	**$517K**
		Plus 20% contingency	**$620.4K**

Summary of spend by task



Project development	2%
System planning	7%
System design	7%
System delivery	83%
System management	1%

Summary of spend by role

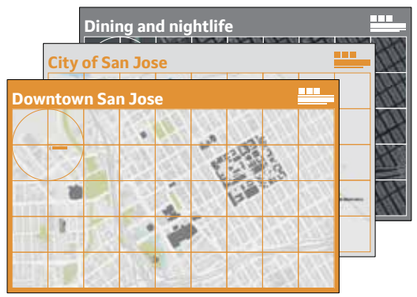


System designer & Information designer	21%
Other design specialisms	0%
Cartography designer	2%
Industrial designer	2%
Manufacturer	58%
Installation Engineer	17%

Year 1 program | Project 05

TITLE
Downtown and City Region
Print Maps (Print and PDF)

PRODUCT TYPE
Updated downtown visitor map
New wider San Jose visitor map



OUTPUT
Design

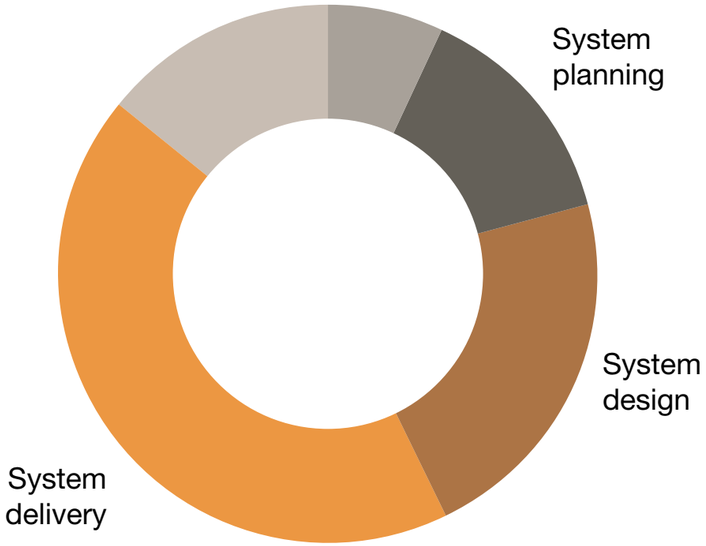
CLIENT LEAD
City of San Jose

PROJECT PARTNERS
TBD

DURATION
4 months

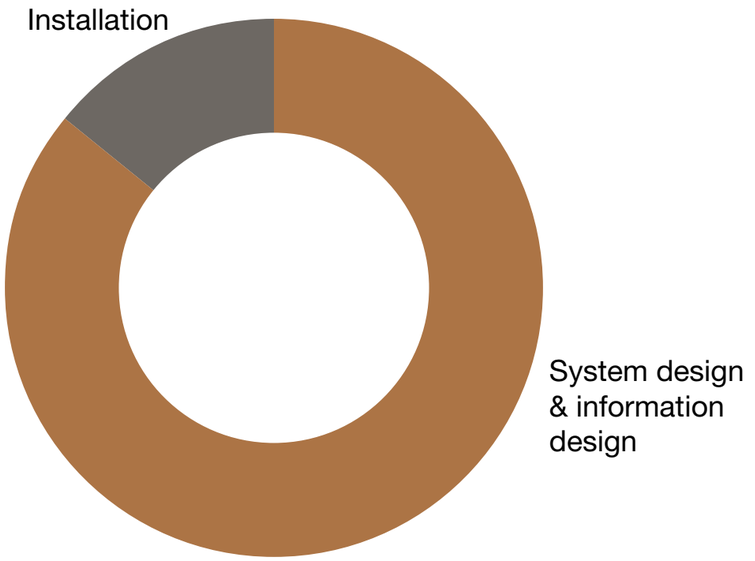
Task	Description	Roles	Total
5.1	**Project development** _Meetings, presentations and client support	System Designer	**$5K**
5.2	**Planning** _Concept development _Definition of information requirements _Information planning _Content planning	System Designer Information Designer	**$10K**
5.3	**Design** _Resource development _Print map design development	System Designer Information Designer Cartography Designer	**$15K**
5.4	**Delivery** _Print files preparation and printer liaison _Print production for updated Downtown map _Print production for new City Region map	System Designer Information Designer Cartography Designer	**$30K**
5.5	**System management** _Design standards and guidance _Engagement and communication	System Designer	**$10K**
		TOTAL	**$70K**
		Plus 20% contingency	**$84K**

Summary of spend by task



Project development	7%
System planning	14%
System design	22%
System delivery	43%
System management	14%

Summary of spend by role



System designer & Information designer	14%
Other design specialisms	0%
Cartography designer	0%
Industrial designer	0%
Manufacturer	0%
Installation Engineer	86%

Year 2 program | Project 06

TITLE
Core Downtown Wayfinding Phase 2

PRODUCT TYPE
Navigation product

OUTPUT
Design and delivery

CLIENT LEAD
City of San Jose

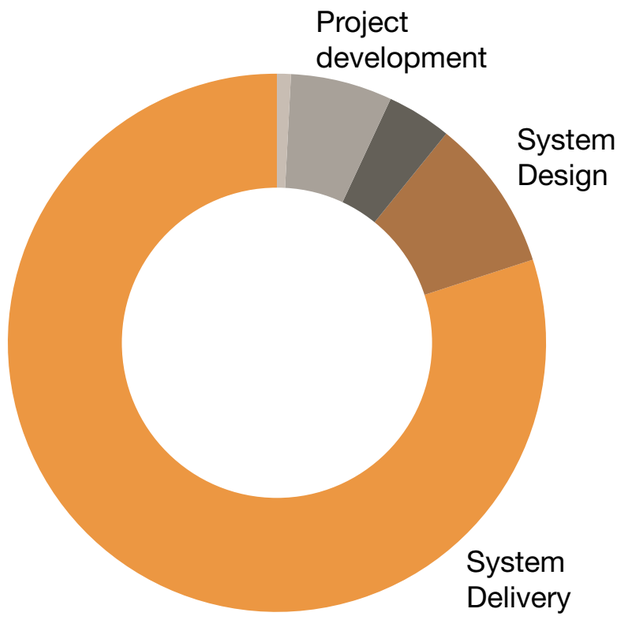
PROJECT PARTNERS
Partnership group

DURATION
6 months

QUANTITIES
40 products for the extended network (estimated)

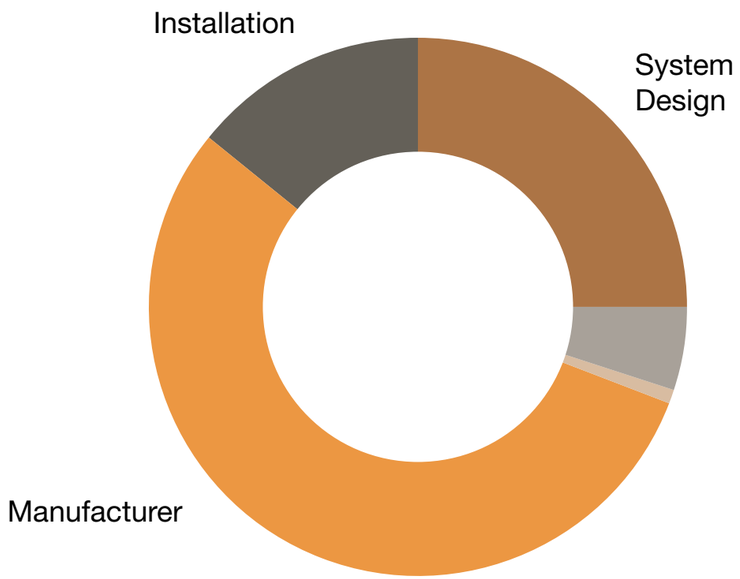
Task	Description	Roles	Total
7.1	**Project development** _Meetings, presentations and client support	CoSJ System Designer	$30K
7.2	**System planning** _Information planning and system architecture _Network and location planning _Nomenclature and content planning	System Designer	$22.5K
7.3	**System design** _Development of identity resource _Map base development	System Designer Cartography Designer	$50K
7.4	**System delivery** _Production artworking _Prototyping _Manufacture _Installation	System Designer Manufacturer Installation Engineer	$954K
7.5	**System management** _Design standards and guidance	CoSJ System Designer	$5K
		TOTAL	$1061.5K
		Plus 20% contingency	$1273.8K

Summary of spend by task



Project development	3%
System planning	2%
System design	5%
System delivery	90%
System management	1%

Summary of spend by role

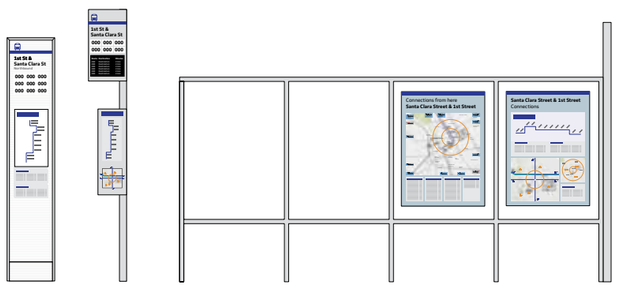


System designer & Information designer	13%
Other design specialisms	0%
Cartography designer	3%
Industrial designer	1%
Manufacturer	60%
Installation Engineer	23%

Year 2 program | Project 07

TITLE
Core Downtown Transit – Phase 2

PRODUCT TYPE
Priority bus transit products



OUTPUT
Design and delivery

CLIENT LEAD
City of San Jose and VTA

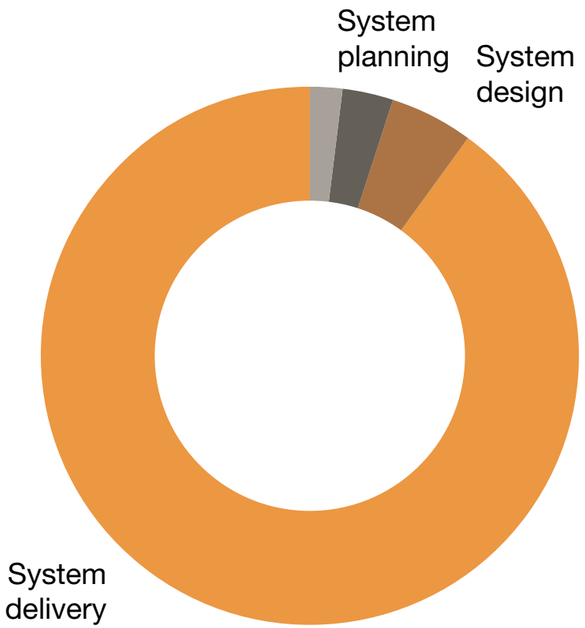
PROJECT PARTNERS
Partnership group

DURATION
12 months

QUANTITIES
Within wider area:
_40 bus flags (product/info)
_20 bus totems (product/info)
_20 bus shelters (product/info)
_Active/interactive TBC

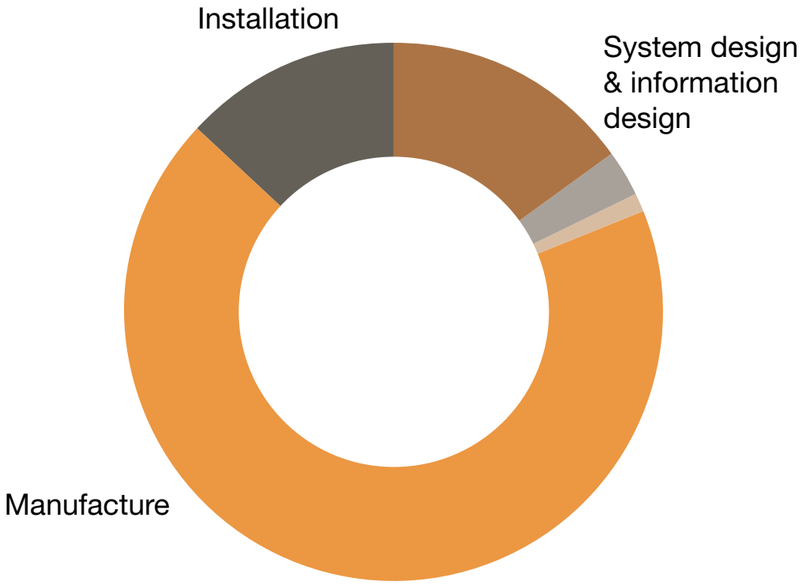
Task	Description	Roles	Total
6.1	**Project development** _Meetings, presentations and client support _Reports and outputs _Procurement support	VTA System Designer	**$30K**
6.2	**System planning** _Conceptual system development _Detailed Information and product type specifications _Information planning and system architecture _Network and location planning _Nomenclature and content planning	System Designer Information Designer	**$40K**
6.3	**System design** _Detailed information design _Visual identity development _Development of identity resource _Map base and transit diagram design _Product design	System Designer Information Designer Cartography Designer Industrial Designer	**$55K**
6.4	**System delivery** _Production artworking _Detailed product design _Prototyping _Manufacture _Installation	System Designer Industrial Designer Manufacturer Installation Engineer	**$1,327.5K**
6.5	**System management** _Design standards and guidance _Engagement and communication _Monitoring and support	System Designer Industrial Designer	**$5K**
		TOTAL	**$1,457.5K**
		Plus 20% contingency	**$1,749K**

Summary of spend by task



Project development	2%
System planning	3%
System design	4%
System delivery	91%
System management	0%

Summary of spend by role

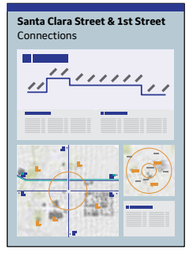


System designer & Information designer	13%
Other design specialisms	0%
Cartography designer	3%
Industrial designer	1%
Manufacturer	63%
Installation Engineer	21%

Year 2 program | Project 08

TITLE
BART Station Prototyping
Scoping for onward journey information

PRODUCT TYPE
Onward journey information TBD



OUTPUT
Design and delivery

CLIENT LEAD
MTC

PROJECT PARTNERS
BART, City of San Jose

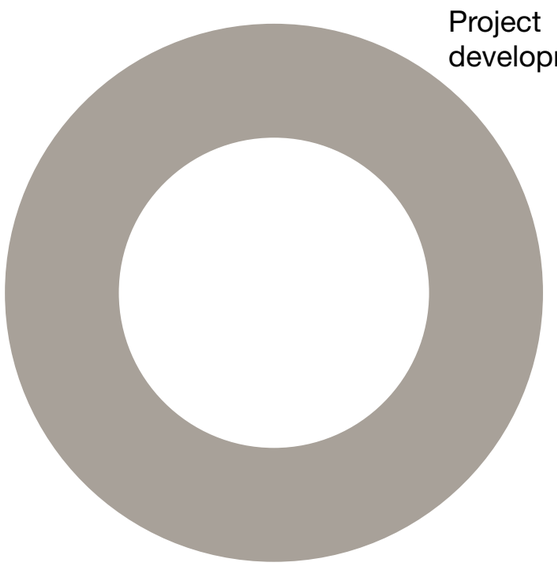
DURATION
6 months

_Product types TBC
_Active/interactive TBC

Task	Description	Roles	Total
8.1	**Project development** _Meetings, presentations and client support _Reports and outputs _Procurement support	CoSJ and partners System Designer	**$20K**
8.2	**System planning** _To be costed		**$TBD**
8.3	**System design** _To be costed		**$TBD**
8.4	**System delivery** _To be costed		**$TBD**
8.5	**System management** _To be costed		**$TBD**

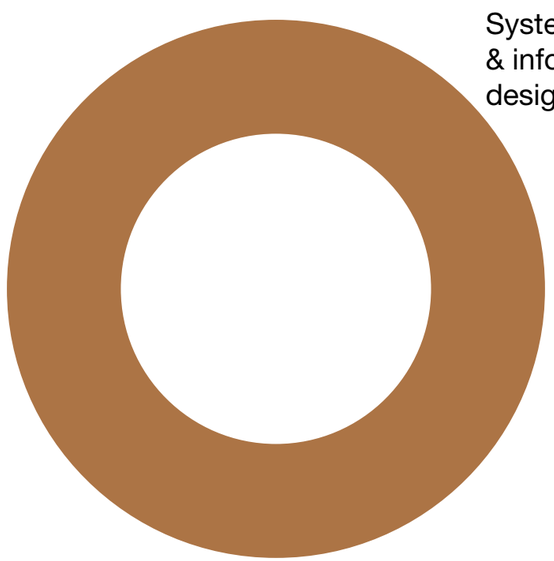
TOTAL	**$20K**
Plus 20% contingency	**$24K**

Summary of spend by task



Project development	100%
System planning	0%
System design	0%
System delivery	0%
System management	0%

Summary of spend by role



System designer & Information designer	100%
Other design specialisms	0%
Cartography designer	0%
Industrial designer	0%
Manufacturer	0%
Installation Engineer	0%

Year 2 program | Project 09

TITLE
Digital Strategy

PROJECT TYPE
Developing strategy and defining wayfinding resources for digital and printed information

OUTPUT
Scoping and concept development

CLIENT LEAD
City of San Jose

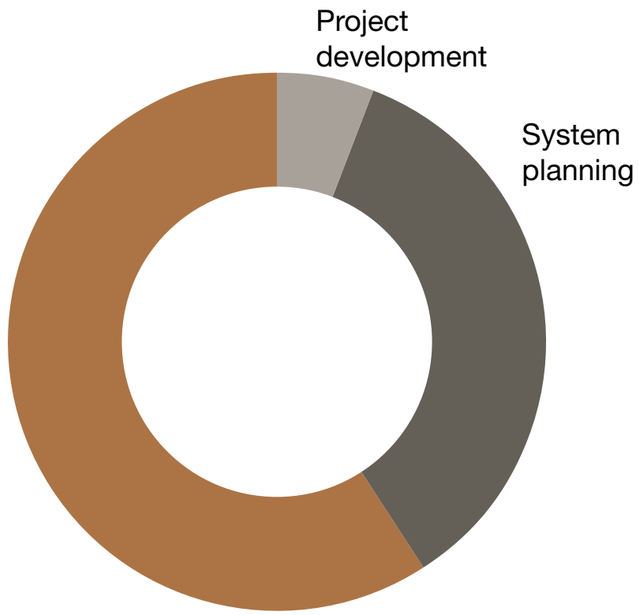
PROJECT PARTNERS
Downtown Association and Team San Jose

DURATION
4 months

Task	Description	Roles	Total
9.1	**Project development** _Meetings, presentations and client support _Reports and outputs _Procurement support	CoSJ and partners System Designer	**$10K**
9.2	**Planning** _Scoping _Strategy development _Detailed Information and product type specifications _Information planning and system architecture	System Designer Information Designer	**$60K**
9.3	**Design** _Conceptual design _Visualization of digital services		**$100K**
9.4	**Delivery** _TBD		**$TBD**
9.5	**System management** _TBD		**$TBD**

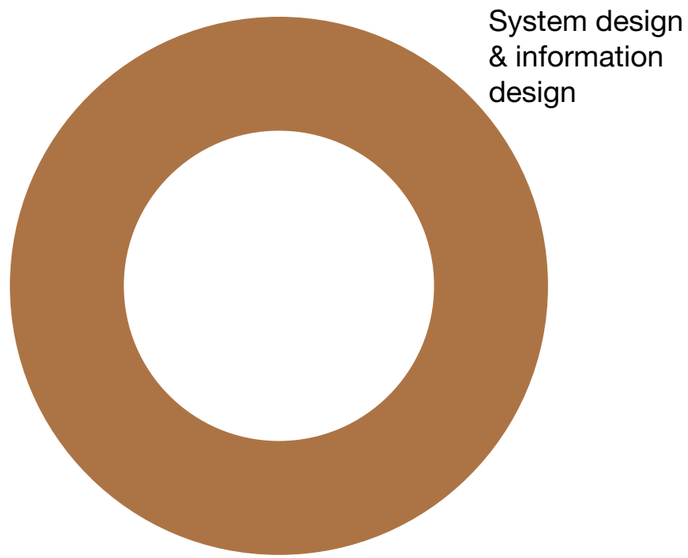
TOTAL	**$170K**
Plus 20% contingency	**$204K**

Summary of spend by task



Project development	6%
System planning	35%
System design	59%
System delivery	0%
System management	0%

Summary of spend by role

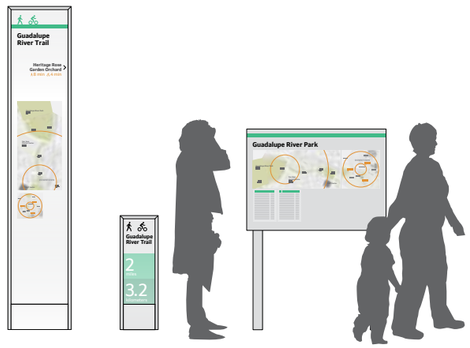


System designer & Information designer	100%
Other design specialisms	0%
Cartography designer	0%
Industrial designer	0%
Manufacturer	0%
Installation Engineer	0%

Year 2 program | Project 10

TITLE
Extended Downtown Wayfinding Phase 3

PRODUCT TYPE
Trail products, route markers and parks



OUTPUT
Design and delivery

CLIENT LEAD
City of San Jose

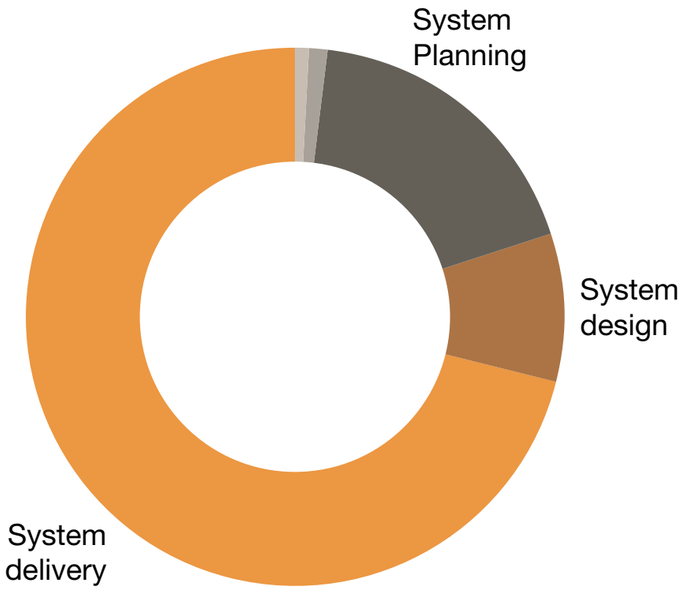
PROJECT PARTNERS
Parks and Conservancies

DURATION
9 months

QUANTITIES
_12 trail products (estimated)
_20 trail markers (estimated)
_5 park products (estimated)

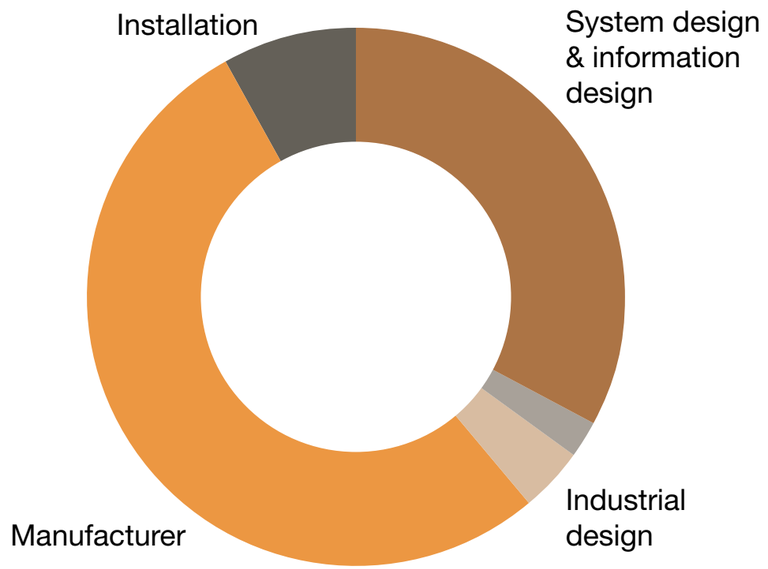
Task	Description	Roles	Total
10.1	**Project development** _Meetings, presentations and client support _Reports and outputs _Procurement support	CoSJ and partners System Designer	**$6K**
10.2	**System planning** _Detailed Information and product type specifications _Information planning and system architecture _Network and location planning _Nomenclature and content planning	System Designer	**$78K**
10.3	**System design** _Detailed information design _Development of identity resource _Product design	System Designer Information Designer Cartography Designer Industrial Designer	**$41K**
10.4	**System delivery** _Production artworking _Detailed product design _Manufacture _Installation	System Designer Information Designer Industrial Designer Manufacturer Installation Engineer	**$427.7K**
10.5	**System management** _Design standards and guidance _Engagement and communication _Monitoring and support	System Designer Industrial Designer	**$6K**
		TOTAL	**$558.7K**
		Plus 20% contingency	**$670.44K**

Summary of spend by task



Project development	1%
System planning	14%
System design	7%
System delivery	77%
System management	1%

Summary of spend by role



System designer & Information designer	26%
Other design specialisms	0%
Cartography designer	2%
Industrial designer	3%
Manufacturer	52%
Installation Engineer	17%

Year 2 program | Project 11

TITLE
Bike Share Integration

PRODUCT TYPE
Updated Bike Share Information

OUTPUT
Design and delivery

CLIENT LEAD
City of San Jose and Motivate (Bikeshare)

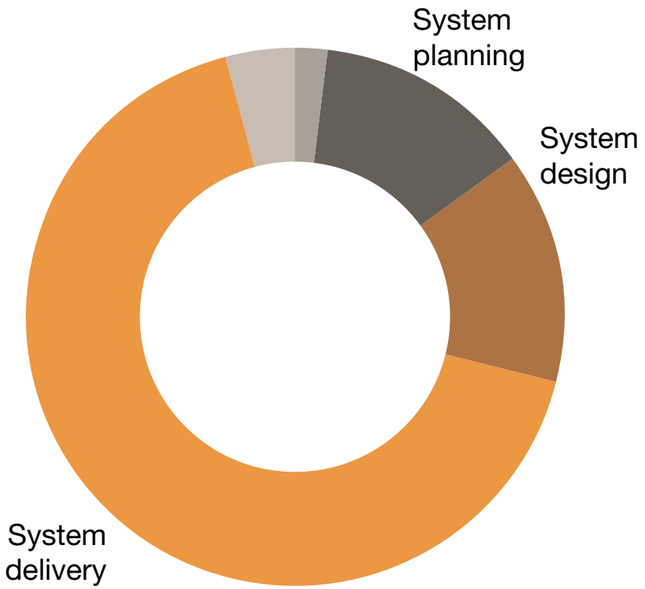
PROJECT PARTNERS
MTC

DURATION
9 months

QUANTITIES
_120 products (estimated)

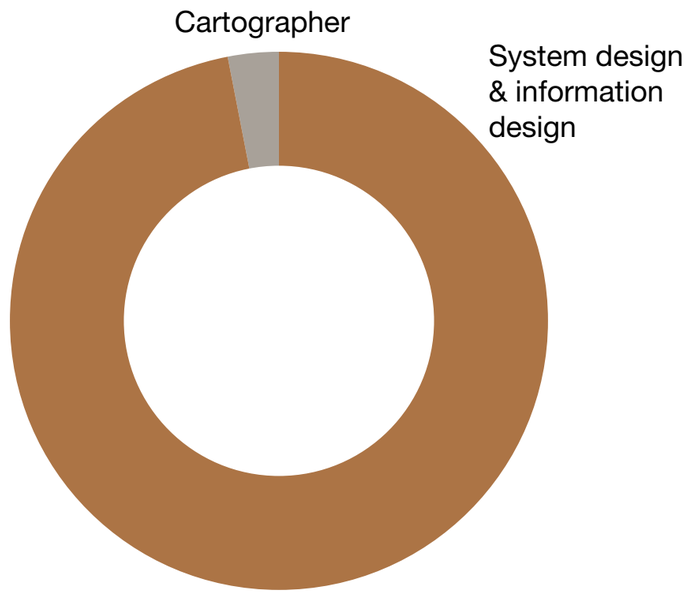
Task	Description	Roles	Total
11.1	**Project development** _Meetings, presentations and client support _Reports and outputs _Procurement support	CoSJ and partners System Designer	**$4K**
11.2	**System planning** _Conceptual system development _Detailed Information and product type specifications _Information planning and system architecture _Network and location planning _Nomenclature and content planning	System Designer Information Designer	**$23.5K**
11.3	**System design** _Detailed information design _Visual identity development _Development of identity resource _Product design	System Designer Information Designer Cartography Designer	**$25K**
11.4	**System delivery** _Production artworking	System Designer Information Designer	**$120K**
11.5	**System management** _Design standards and guidance _Engagement and communication _Monitoring and support	System Designer	**$6K**
		TOTAL	**$178.5K**
		Plus 20% contingency	**$214.2K**

Summary of spend by task



Project development	2%
System planning	13%
System design	14%
System delivery	67%
System management	4%

Summary of spend by role



System designer & Information designer	97%
Other design specialisms	0%
Cartography designer	3%
Industrial designer	0%
Manufacturer	0%
Installation Engineer	0%

Year 1 & 2 summary

Summary

A table of possible immediate tasks discussed with CoSJ are shown opposite.

The table below shows a summary of projects 1 to 11 (not including the immediate tasks) which are expected to start in Years 1 and 2. The anticipated spend in each year has been shown for reference as well as grand totals of anticipated levels of investment.

Priority projects are highlighted like this.

Immediate tasks	2015	2016	2017	Total
– Super Bowl Print Map	$40K			$40K
– Scoping for City User Interface		$155K		$155K
Immediate task totals				
	$40K	**$155K**		**$195K**
Immediate task totals plus 20% contingency				
	$48K	**$186K**		**$234K**

Year 1 start		2015	2016	2017	Total
1	Core Downtown Wayfinding Phase 1 (The Mesh)		$1020K		$1020K
2	Downtown Transit Phase 1		$1449K		$1449K
3	Arrival/departure Points		$207K		$207K
4	Destination/hotspot Points		$517K		$517K
5	Downtown and City Region Print Maps		$70K		$70K
Year 1 totals					
			$2846K		**$3,263K**
Year 1 total plus 20% contingency					
					$3,915.6K

Year 2 start		2015	2016	2017	Total
6	Core Wayfinding Phase 2			$1061.5K	$1061.5K
7	Wider Downtown Transit Phase 2			$1457.5K	$1457.5K
8	BART Station Prototyping			$20K	$20K
9	Digital Strategy			$170K	$170K
10	Extended Wayfinding Phase 3			$558.7K	$558.7K
11	Bike Share Integration			$178.5K	$178.5K
Year 2 start totals					
				$3,446.2K	**$3,446.2K**
Year 2 start total plus 20% contingency					
					$4,135.4K

Year 3–5 summary

Projects in Year 3–5 are not costed at this stage as it is not possible to judge how quickly projects in Year 1 and 2 progress and how priorities will change. The list of projects opposite is provided for information and could be used as the basis for determining budgetary costs when required.

Year 3–5 start		2017	2018	2019	Total
12	**Wi-fi Interface** _Using digital assets NFC connectivity to create digital experience and interface	–	–	–	TBD
13	**Transit Light rail** _Area TBD _To include: Light rail stops and infrastructure	–	–	–	TBD
14	**Transit Phase 3** _Wider area TBD _To include: Light rail, Transfer products, shelters and stops	–	–	–	TBD
15	**Unified Street Furniture** _To include development of select street furniture elements	–	–	–	TBD
16	**Advertising Strategy and Facilities** _Development of a commercial advertising strategy, model and display products	–	–	–	TBD
17	**Highway and Parking Lot Arrival Information** _Review of highway signage, highway parking signage and parking lot arrival information	–	–	–	TBD
18	**Temporary Information Toolkit** _Toolkit for partners to deliver temporary information for major events	–	–	–	TBD
19	**Digital Toolkit for Third Parties (Portal)** _Digital toolkit of design resources, graphics and standards, made available through an online portal. May include online	–	–	–	TBD
20	**Interactive Visitor Information Kiosks** _Development of interactive wayfinding products for a limited number of locations TBD	–	–	–	TBD

Funding

Funding options

For any system to be successful, there is a need for both an initial capital investment to develop and implement the scheme and then ongoing maintenance funding to keep the physical system in a good state of repair, up-to-date and functioning well.

There are a number of different ways in which City wayfinding systems can be funded. These funding options should be considered by CoSJ, VTA and MTC individually and collectively before a given route is selected.

Understanding the routes that San Jose could pursue, and the balance between revenue and capital will help determine the best specification for a robust and manageable system, so these options should be considered at an early stage.

Potential funding sources include:

Internal funds – Systems initiated from City funds can often be more reliant on capital than revenue. However, systems that have a degree of ownership by transit agencies have greater success in securing maintenance revenue due to existing funding and maintenance contracts.

The benefits of wayfinding in encouraging sustainable transit options is key to accessing many funding opportunities. Ultimately, building a business case that assesses cross departmental benefits in relation to transport, economy, environment, tourism, culture and health, can help secure funding commitments from a broader range of sources.

Development
If projects coincide with major downtown developments, then this can be a route of gaining some initial funding. More importantly, if the City can adopt a position where new developments have to make a contribution, that can be directly apportioned to updating or extending the wayfinding system, this can ensure the ongoing growth, updating and maintaining of the system.

Grant funds
Applying for funding bids can provide access to Federal or State capital funds for development. Initiating and securing these bids can take some time and can delay implementation of on street infrastructure. However they can help with initial or future development funding if a suitable opportunity can be identified.

OOH advertising
One potential source of capital and or revenue can be Out of Home (OOH) advertising providers. Predominant suppliers of on street advertising in the US have been active in the area of providing revenue and/or on street amenities for many years.

Generally, in return for an exclusivity contract for the provision of on street advertising in the form of ‘six sheet’ panels for a fixed period, the companies will agree to share the revenues of the advertising and or provide the city with other equipment. Crucially, they will also take on the maintenance of the equipment. This of course has to be funded out of the advertising revenues, and some authorities find there are more economically efficient providers.

This approach could also be managed internally, leading to a higher level of management, but a higher return on investment.

Sponsorship
Limited sponsorship can be beneficial for project when done with respect for the user experience. Organization logos can be placed in discreet, but noticeable, locations on the wayfinding products.

Business case

Evaluation criteria

During the workshop process, the need for a wayfinding evaluation criteria was discussed to monitor and measure the success of the program. Quantifiable evaluation could be used as a means to develop the business case for the program and may support future funding requirements.

In order to develop a business case of this kind it is recommended that further user research is conducted to support the goals of the wayfinding program and develop a baseline of results that can be used for future comparison.

A number of evaluation themes were identified through this process and are captured on this page for reference. These themes should be considered in the development of quantitative and qualitative analysis.

1. User satisfaction	_Ease of use/navigation _Improved journeys _Improved perceptions of walking environment and public space _Transit efficiency and accessibility	_Impact on street environment _Improved journeys _Improved perceptions of walking environment _Transit efficiency and accessibility
2. Raised awareness	_Awareness of wayfinding products and services _Awareness of modal choices _Awareness of downtown destinations _Awareness of area names _Awareness of events and activities	_Perception of journey times _Perception of distance _Awareness of health benefits
3. Behavior change	_Shift to more sustainable journey options _Increased pedestrian footfall _Increased dwell times/number of those using public spaces _Increased number of transit journeys	
4. Cost/ benefit	_Social benefits – improved access, knowledge of place, access to employment and education _Environmental benefits – more sustainable journey choices _Economic benefits – increased footfall,	_Health benefits – improved fitness, air quality and fewer casualties _Inward investment from private and public sectors _Benefits to other partners and stakeholder

Project team

Client and consultant teams

Strong and sustained leadership is required from the client team throughout this process. At this stage, we would recommend the following key roles are considered:

_**CoSJ and VTA Project managers** – Responsible for the day-to day management of teams, communication with stakeholders and the tracking of program schedules.

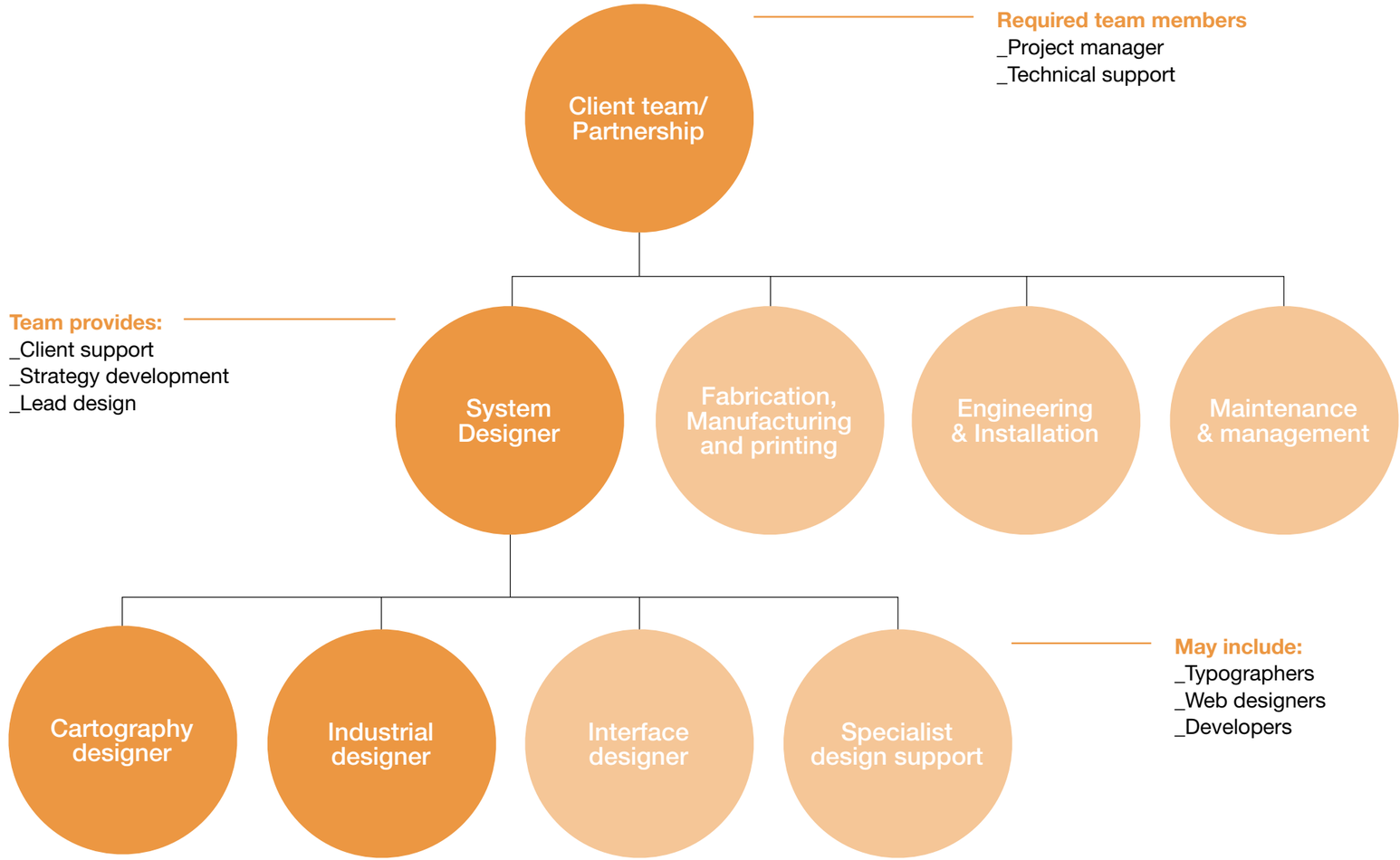
_**CoSJ and VTA Technical specialists** – To guide the development of digital resources and manage their use.

A capable and experienced consultant team with a breadth of project experience is also required to fulfil the goals of this program. Key roles include:

_**System and information designer** – Responsible for design of the overall system architecture, planning and information.

_**Cartographic designer** – Responsible for the technical generation and management processes behind the cartographic resource.

_**Industrial designer** – Responsible for product design and guiding the prototyping, engineering and manufacturing processes.



Next steps

Recommended next steps

The following activities and tasks need to be undertaken prior to commencing the design stages:

1. Initial client team consultation on wayfinding program recommendations

This project stage provides direction for future phases of the program as well as a detailed breakdown of the recommended program requirements for future delivery.

The proposed lead clients should review this document and provide feedback to the consultant team – defining priorities for development against existing budgets and funding streams.

2. Mayoral briefing and endorsement

The lead clients should schedule a Mayoral briefing session in order to request feedback and seek endorsement for the project. This briefing should seek funding for priority projects and their implementation.

3. Appoint Client Lead and interim Project Managers

It is recommended that the client team appoint an internal Client Lead who is supported by a dedicated Project Managers for CoSJ and VTA. The Client Lead and Project Manager will focus on project delivery, confirm and manage initial partnership arrangements, review procurement options, define a detailed cost plan and establish initial funding arrangements.

4. Establish Project Boards

It is recommended that two Way2SJ Project Boards are established to support a partnership approach to delivery and the long-term strategic objectives of the project.

1. A pedestrian wayfinding project board led by the City of San Jose:

The Project Board will report on progress, make strategic recommendations to the Mayor and gain approvals on key project decisions.

2. A transit wayfinding project board led by the VTA:

This group should meet monthly to communicate effectively the updates made by the Project Board and to share information across various transport agencies.

5. Develop a detailed priority and cost plan

The Client Lead, supported by the Project Manager should develop a detailed priority and cost plan to define potential income and expenditure by project stage covering the Year 1 & 2 period and forward planning for Years 3-5. This should include a review of existing funding budgets and identification of other potential sources for longer term delivery.

6. Agree Year 1 and 2 deliverables

The Client Lead should work with partners to agree Year 1 and 2 priority deliverables which will in turn inform outline briefs for system development and implementation, including a range of internal San Jose resources and external consultant specialists and suppliers needed to deliver the projects.

7. Agree procurement route

Define procurement approach and process for services required:

_Project management support
_System design and creative direction
_Design services for pilot and full projects
_Supply of manufacturing services & implementation
_Maintenance and future information management

Program development workshops

It is recommended that the wayfinding program continues to evolve in a open and collaborative way, involving and informing stakeholders at regular intervals.