



SFMTA Strategic Plan

***SFMTA Board of Directors
Workshop***
January 23, 2018



Agenda

- Review of strategic planning and metrics development to date
- Overview of proposed plan elements
- Discussion of key issues and indicators
- Strategic Plan implementation and reporting



Process Overview

Strategic Planning & Development

Why Do We Need a Strategic Plan?

Strategic plans:

- Help align an organization's people, services, projects, processes, and tools
- Establish the overall direction of an organization as well as specific strategies, actions, and metrics
- Are revised as “living documents” to reflect current conditions and needs

SFMTA Strategic Plan Development Process

**Summer
& Fall
2016**

Best practices research
Exploratory assessment of the current Strategic Plan

**Winter &
Spring
2017**

Needs assessment and organizational development research
Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis

**Summer
& Fall
2017**

Agency outreach, including a values survey, site visits, and value and objective workshops
Development of the new Strategic Plan Elements

**Winter &
Spring
2018**

Development and vetting of the new Strategic Plan and the Key Performance Indicators (KPIs)
Board of Directors' Approval of the new Strategic Plan

**Summer
2018**

Kick-start implementation of the new Strategic Plan

Research & Development of the New Plan

INFORMATION GATHERING & NEEDS ASSESSMENT

- Agency SWOT & Plus Delta with agency staff
- Identified emerging issues with SFMTA Board, Citizens Advisory Council
- Review of over 35 peer transit agency strategic plans
- Research, tracking of ongoing planning and policy efforts



PLAN ELEMENT DEVELOPMENT & DRAFTING

- Staff outreach to develop new Values
- Drop-in brainstorming sessions to refine Objectives
- Executive Team offsite workshop to draft new Plan elements
- External stakeholder survey to complement agency-wide research
- Vetted draft elements with agency teams including CAC, PAG, SMT and other staff

Review of the Planning and Policy Framework

Key Policies:

- **Transit First Policy** - established in 1973 and amended in 2007, gives priority to transit, walking, and bicycling in San Francisco.
- **Sustainable Communities and Climate Protection Act of 2008 (SB 375)** – directs regions to adopt a “sustainable communities’ strategy” as part of their regional transportation plan, including strategies for land use, housing, and transportation to reduce greenhouse gas (GHG) emissions
- **Vision Zero Policy** – adopted in 2014, the City committed to build better and safer streets, educate the public on traffic safety, enforce traffic laws, and adopt policy changes that save lives.

Existing City and Agency Plans and Programs:

- San Francisco Transportation Plan
- San Francisco Environment Code & Climate Action Strategy
- Transportation Sustainability Program
- Muni Forward

Input that shaped the new strategic plan

Series of meetings, surveys, workshops, discussions, and interviews of the following:

- SFMTA Board of Directors
- SFMTA Citizens' Advisory Council (CAC)
- Key Stakeholders and Advocates
- Public engagement
- SFMTA Staff
- SFMTA Executive Team

Listening: SFMTA Board

- **Equity:** Muni is critical to the city and all its residents, workers, and visitors
- **Communications:** Improve communications and public engagement to better understand the needs of the city and change perceptions of the agency and its services.
- **Regional coordination:** Increase coordination with regional agencies and establish common goals to make improvements.
- **Emerging mobility services:** Understand impacts on the system from emerging mobility services.
- **Fiscal responsibility:** Identify new and stable funding opportunities.
- **Staff engagement & training:** succession planning and education/training programs; cost of living in city and region; lengthy hiring practices.

Listening: Citizens' Advisory Council

- **Transit performance:** Improve Muni travel time, service capacity and reliability
- **Regional coordination:** Coordinate with regional transit providers
- **Data analysis & reporting:** Improve data analysis and reporting
- **Accessibility:** Focus on transit accessibility and accommodation of the aging population
- **Travel choices:** Promote shifting modes to active transportation
- **Communications:** Improve Communications to the public
- **Goods movement & freight:** Facilitate the movement of goods as well as people

Listening: Key Stakeholders

- **Communications:** Improved communications are important regarding equity and transparency concerns; all city agencies must commit to prioritizing outreach.
- **Transit performance:** Improved transit reliability and travel times that are faster than other travel options.
- **Regional coordination:** Regional and local transportation systems are not aligned, makes mobility challenging across the Bay Area.
- **Emerging mobility services:** SFMTA needs to coordinate service with other private mobility companies and systems.

Listening: The Public

Highest Priorities:

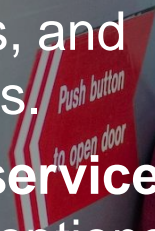
- **Near-term:** attractive and safe travel options that support livable neighborhoods.
- **Long-term:** healthy and sustainable environment and easy access to jobs and key destinations.

People Are Excited About:

- **Transit performance:** service and route expansions, and Muni Forward projects.
- **Emerging mobility services:** new ways and travel options to get around the city.
- **Sustainability:** moving away from fossil fuels.

Key Areas to Improve:

- **Transit performance:**
 - Affordability and accessibility for all users, esp. people with disabilities and families
 - Muni reliability
- **Active Transportation:** allocating more space for people walking and bicycling
- **Customer security:** increased security on Muni



Issues and Challenges

- *Vision Zero* & safety
- Customer security
- Transit collisions
- Better infrastructure
- Transit performance
- Attracting customers
- Parking and curb space
- Cleanliness
- Active transportation
- Streetscape + urban environment
- Communications
- SFMTA planning & policy changes
- Emerging mobility services
- Equity
- Work planning and prioritization
- Resource allocation & fiscal health
- Environmental Sustainability
- Resilience

Agency Values

- Equity
- Employee development
- Safe space/building trust
- Data-driven decision-making and reporting
- Process improvements & how we work
- Agency and staff security
- Internal communication
- Performance plans
- Unified vision
- Accountability
- Break down silos
- Physical workspace
- Recognition

Listening: SFMTA Executive Team

Key initiatives to address in next plan:

- *Vision Zero*
- Equity, Diversity and Inclusion
- Emerging mobility services
- *Connect SF* and long-range planning
- Recommendations from the Transportation Taskforce
- Succession planning
- *Outstanding Workplace* Initiative and staff engagement

Process and Implementation:

- Current strategic goals and general structure of the plan works for the agency; they provide a good foundation for future work
- Important to address key issues and be nimble in response to changes in city
- Important to connect the strategic plan to all staff; make this matter to people as a touchstone and guide for our work

Summary of What to Address in the New Plan

- Equity
- Emerging Mobility Services and Technologies:
Transportation Network Companies, autonomous vehicles, etc.
- *Vision Zero* policy and initiatives
- *Transit First* policy and multimodal coordination
- Communications and community engagement
- Accessibility
- Sustainability and climate adaptation
- Uncertainty of federal funding sources
- Regional impacts and coordination opportunities
- Planning for changing travel modes and patterns
- Agency diversity and inclusion
- Project delivery and internal process improvements

Strategic Plan

Proposed New Elements



The Strategic Plan Elements



Vision: Our future desired state



Mission: The agency's overall function and purpose



Values: Principles and behaviors to guide how we work



Goals: Key areas on which to focus our efforts to achieve our vision



Objectives: Specific ways we can achieve our Goals



Key Performance Indicators (KPIs): How we track our progress



Actions: Programs and initiatives to move the needle on the KPIs

Changes from the Last Plan

- Refine the vision and mission statement for the agency
- Retain the focus of the four main goals, but redefine and shift objectives to respond to city and agency needs
- Reintroduce values along with new defining statements to describe intended meaning for the agency
- Establish a two-year implementation cycle, aligned with the budget process, for evaluation of the plan and updates to actions and metrics

Current

SFMTA Vision

San Francisco: great city, excellent transportation choices

SFMTA Mission

We work together to plan, build, operate, regulate and maintain the transportation network, with our partners, to connect the community

Proposed

SFMTA Vision:

Excellent transportation choices for San Francisco

Mission Statement:

We connect San Francisco through a safe, equitable, and sustainable transportation system



Workplace Values

Respect – Inclusivity – Integrity

RESPECT:

- We are courteous and constructive in our treatment of others
- We recognize our colleagues and their contributions are vital to the agency
- We listen and directly engage our colleagues and the public to understand their needs and deliver effective services

INCLUSIVITY:

- We seek a variety of identities, abilities and interaction styles to promote a diverse and fair workplace
- We operate from the context of teamwork and positive intent
- We serve the public and address historic inequities in transportation by including all communities in the agency's decision-making processes

INTEGRITY:

- We are accountable for and take ownership of our actions
- We are responsive and honor our commitments to our colleagues and stakeholders
- We are transparent and honest in everything we do, from internal operations to external delivery

Strategic Goals, Objectives & Key Performance Indicators



Goal 1: Safety

Create a safer transportation experience for everyone

Objective	Key Performance Indicators
1.1: Achieve Vision Zero by eliminating all traffic deaths	<ul style="list-style-type: none">• Traffic fatalities
1.2: Improve the safety of the transit system	<ul style="list-style-type: none">• Muni collisions per 100,000 miles
1.3: Improve security for transportation system users	<ul style="list-style-type: none">• SF Police Department-reported Muni-related crimes per 100,000 miles• Customer rating: Feeling safe and secure from crime on Muni

Goal 1: Discussion

In proposed new plan:

- Retained goal language.
- Shifted the workplace safety and security to Goal 4.
- Linked objective to Vision Zero.
- Established new objective to specifically focus on transit safety.
- Retained current key performance indicators.

New Key Performance Indicators:

1.1: Traffic fatalities

Goal 2: Travel Choices

Make transit and other sustainable modes of transportation the most attractive and preferred means of travel

Objective	Key Performance Indicators
2.1: Improve transit service	<ul style="list-style-type: none">• Muni on-time performance• % of Muni trips with service gaps• % of scheduled Muni service hours delivered• % of Muni bus trips over capacity during AM/PM peak• Muni mean distance between failure• % of cable service hours delivered without interruption• Operational availability of elevators & escalators at Muni stations

Goal 2: Travel Choices

Make transit and other sustainable modes of transportation the most attractive and preferred means of travel

Objective	Key Performance Indicators
2.2: Enhance and expand use of the city's sustainable modes of transportation	<ul style="list-style-type: none">• Muni average weekday and annual ridership• Sustainable transportation mode share• Average weekday bicycle counts• Average weekday taxi trips• Customer rating: Overall customer satisfaction with Muni
2.3: Manage congestion and parking demand to support the Transit First policy	<ul style="list-style-type: none">• Muni/Auto speed ratio on key transit segments• % of metered hours that meet parking occupancy targets

Goal 2: Discussion

In proposed new plan:

- Simplified goal language.
- Moved communications-related objective to Goal 4.
- Focused on improving transit and enhancing and expanding sustainable modes overall.
- Established a more specific direction for parking to support the *Transit First* Policy and address the movement of goods.

New Key Performance Indicators:

- 2.1:** % cable service hours delivered without interruption; Muni trips with service gaps
- 2.2:** Sustainable transportation mode share; average weekday bicycle counts; average weekday taxi trips
- 2.3:** Muni/Auto speed ratio on key transit segments; % of metered hours that meet parking occupancy targets

Goal 3: Livability

Improve the quality of life and environment in San Francisco and for the region

Objective	Key Performance Indicators
3.1: Use Agency programs and policies to advance San Francisco's commitment to equity	<ul style="list-style-type: none">• Muni service gap % differential on Muni Equity Strategy routes• Paratransit on-time performance• Traffic fatalities in Communities of Concern• % of eligible population utilizing free or discounted Muni fare programs• % of contract dollars awarded to disadvantaged business enterprises (DBEs) and local business enterprise (LBEs)• Customer rating: Overall customer satisfaction with paratransit service

Goal 3: Livability

Improve the quality of life and environment in San Francisco and for the region

Objective	Key Performance Indicators
3.2: Advance policies and decisions in support of sustainable transportation and land use principles	<ul style="list-style-type: none">• Ratio of parking spaces to housing units in newly entitled projects
3.3: Guide emerging mobility services so that they are consistent with sustainable transportation principles	<ul style="list-style-type: none">• % of total Transportation Network Companies' (TNC) miles traveled delivering shared trips (data availability TBD)• # of passenger trips using city-permitted emerging mobility transportation services (data availability TBD)

Goal 3: Livability

Improve the quality of life and environment in San Francisco and for the region

Objective	Key Performance Indicators
3.4: Provide environmental stewardship to improve air quality, enhance resource efficiency, and address climate change	<ul style="list-style-type: none">• Transportation sector carbon footprint (metric tons CO2e)• Agency resource consumption (fuel, energy, water)• Agency waste diversion rate
3.5: Achieve financial stability for the agency	<ul style="list-style-type: none">• Muni passengers per hour• Muni cost per revenue hour• Muni cost per boarding• Muni farebox recovery ratio• Agency budget-to-actual ratio• Year-end investment toward State of Good Repair

Goal 3: Discussion

In proposed new plan:

- Expanded goal focus to include the region.
- Established new objectives to focus on equity, long range planning, transportation demand management, and emerging mobility services
- Moved the efficiency and effectiveness of agency process to Goal 4

New Key Performance Indicators:

3.1: *All equity-related metrics are new*

3.2: Ratio of parking spaces to housing units in newly entitled projects

3.3: *All new metrics re: emerging mobility services are pending data availability*

3.4: Transportation sector carbon footprint (metric tons CO₂e)

3.5: Agency budget-to-actual ratio; year-end investment toward State of Good Repair

Goal 4: Service

Create a workplace that delivers outstanding service

Objective	Key Performance Indicators
4.1: Strengthen morale and wellness through enhanced employee engagement, support, and development	<ul style="list-style-type: none">• SFMTA employee absence rate• SFMTA employee wellness program utilization rate• Employee rating: Overall employee satisfaction
4.2: Improve the safety, security, and functionality of SFMTA work environments	<ul style="list-style-type: none">• Workplace injuries per 200,000 hours• Security incidents involving SFMTA personnel

Goal 4: Service

Create a workplace that delivers outstanding service

Objective	Key Performance Indicators
4.3: Enhance customer service, public outreach, and community engagement	<ul style="list-style-type: none">• Muni customer complaints per 100,000 miles• % of Muni customer complaints responded to within timeliness standards• SFMTA employee commendations to 311• Customer rating: Muni communication with riders• Stakeholder rating: [Outreach/engagement survey question TBD]
4.4: Create a more diverse and inclusive workforce	<ul style="list-style-type: none">• Employee rating: I feel that the Agency values workplace diversity.• Employee rating: My concerns, questions, and suggestions are welcomed and acted upon quickly and appropriately• <i>Other diversity metrics TBD</i>

Goal 4: Service

Create a workplace that delivers outstanding service

Objective	Key Performance Indicators
4.5: Increase the efficiency and effectiveness of business processes and project delivery through the implementation of best practices	<ul style="list-style-type: none">• % of capital projects completed within budget• % of capital projects completed on time• % of Muni customer complaints addressed within timeliness standards• % of SSD shops requests addressed within timeliness standards• SFMTA service critical staff vacancy rate

Goal 4: Discussion

In proposed new plan:

- Focused on the people and processes that support staff in provide outstanding service.
- Established a new objective on diversity and inclusion at the agency.
- Included communications here as a fundamental shift in how we approach the process.
- Included internal process and service efficiency here group it with other internal-facing objectives.

New Key Performance Indicators:

- 4.1: Employee absence rate; utilization of wellness programs
- 4.3: Muni customer complaints per 100,000 miles
- 4.4: Employee rating: I feel that the Agency values workplace diversity
- 4.5: % of Muni customer complaints addressed within timeliness standards; SFMTA service critical staff vacancy rate

- **Identify baselines for the key performance indicators and set targets**
- **Board Approval of the new Strategic Plan and targets**
- **Develop and prioritize actions to achieve the objectives**

A woman with curly hair, wearing a USPS uniform and sunglasses, is sitting in the driver's seat of a truck. She is smiling and looking towards the camera. The truck's interior is visible, including the steering wheel and a seat with a USPS logo. A digital display on the dashboard shows the number 1481. The background shows a bright outdoor scene with a building and a truck.

Thank You



Lunch & Poster Session

Projects and programs in support of the four strategic goals

GOAL 1:

Safety

GOAL 2:

*Travel
Choices*

GOAL 3:

Livability

GOAL 4:

Service