



SFMTA

# 2021 Strategic Planning

Policy and Governance Committee Briefing

September 28, 2021

# A Roadmap for the Agency

## **The Strategic Plan:**

- Helps align an organization's people, services, projects, processes, and tools.
- Establishes the overall direction of an organization as well as specific strategies, actions, and metrics.
- Will be revised as needed to reflect changing conditions and needs.

# Agenda

- Development of the Strategic Plan
- External Stakeholder Engagement
- Internal Staff Engagement
- Draft Strategic Plan Elements
- Strategic Plan Implementation



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# Development of the Strategic Plan

- Overview of the structure of the Strategic Plan
- Development Process

# What is different this cycle?

## The new plan will:

- Focus on upholding city and agency values in defining the goals
  - Fundamental goals of safety, mode split, transit services and street management are the same
  - Additional focus on equity, economic recovery, and trust
- Tell a narrative for those values based on data
  - Metrics associated to values
  - Types of metrics
- Have a streamlined structure to remove unnecessary hierarchy in the plan.

# Strategic Plan Elements

**Vision:** The future desired state of the city and transportation system.

## Values:

- Bridge Values: Principles that are commonly held across both the workplace and the transportation system.
- System Values: Clear principles to guide the allocation of resources and how the agency works; driven by the city's core values.
- Workplace Values: Clear principles to establish how staff will work together to accomplish agency goals.

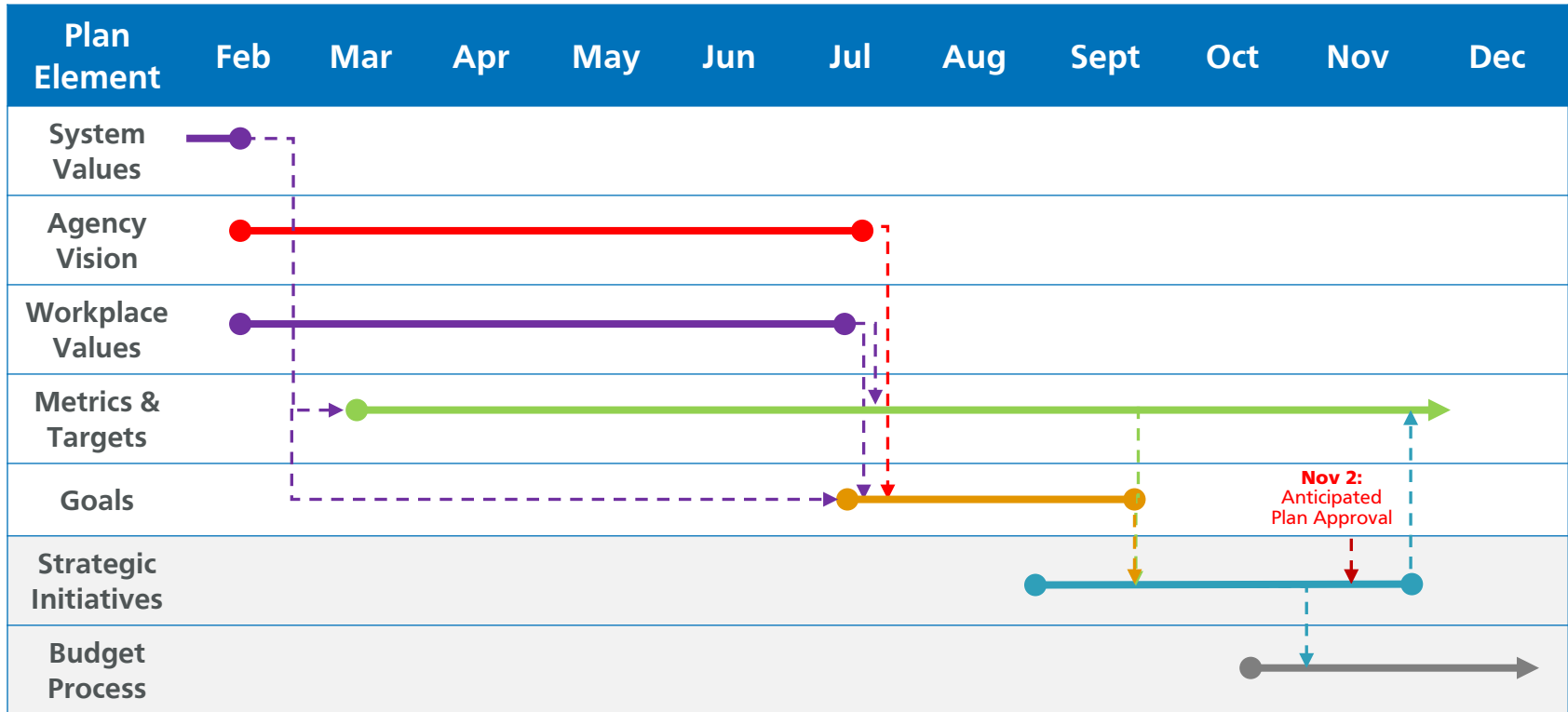
**Strategic Plan Metrics:** These track the overall implementation of the plan and help us tell the story of how we are upholding the values. They very clearly demonstrate our progress towards achieving the goals, guide allocation of resources, and support decision-making.

# Strategic Plan Elements, cont.

**Goals:** Specific areas on which to focus agency efforts to uphold our values and work to meet the needs of the city. These would be major agency-wide efforts like equity, Vision Zero, transit reliability, etc.

**Initiatives:** Critical programs and projects to help us reach our goals. All initiatives will be prioritized and bundled into division workplans. They will also be listed in staff performance plans as applicable, drawing a direct connection from the agency strategic plan to the staff performance plans so staff know how their jobs have impact.

# Strategic Plan Development





# Strategic Plan Development

- **Vision:** Leveraged citywide and agency planning efforts and engaged staff through working sessions led by the Planning team.
- **Values:** Informed by interviews with SFMTA management and staff and incorporated key priorities identified by the Mayor, the SFMTA Board of Directors and ongoing planning efforts. The Executive Team expanded the list of values to reflect the complexity of our work.
- **Metrics:** Worked with subject matter experts to identify the performance metrics to demonstrate how the agency is upholding its values.
- **Goals:** Informed by ongoing and recently completed agency planning efforts and the SWOT analysis.



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# External Stakeholder Engagement

- Contributing plans and documents
- Recent survey results
- Board and CAC Input

# Contributing plans and documents

**OREI Foundations of Understanding** - REAP, HRE ORE Citywide Racial Equity Framework, Gould Report, Blanding Report, Margin to Center Theory, GARE

**Transit Planning** - Connect SF, Muni Equity Strategy, Muni Forward, Building Progress, Fleet Plan, CalTrain DTX, Muni Reliability Working Group, MTC Blue Ribbon Task Force

**Streets Planning** – Vision Zero Strategy, Vision Zero Quick Build Projects, Traffic Calming, Play Streets, Safe Routes to School, Pedaling Forward Bike report, Bikesharing program, Regulated emerging mobility policies, Congestion Management

**Environmental Planning** – Citywide Climate Action Strategy, Transportation Sector Climate Action Plan, Electric Bus Fleet Commitment, Zero Waste, EV Roadmap, The Sea Level Rise Action Plan, Local Coastal Program Amendment, Ocean Beach Adaptation, Hazards and Climate Resilience

**Financial Planning** - T2050, Capital Plan, Budget Planning, State of Good Repair

**COVID Response and Recovery Planning and programs** - Transportation Recovery Plan (TRP), Slow Streets, Shared Spaces, TETLs, etc.

# SFMTA Community Survey Results

- Muni is a vital part of the community
- **Public priorities include:**
  - Investing equitably to increase and improve Muni service for those most dependent on transit.
  - Fast and convenient transit to all parts of San Francisco, reducing delays, making Muni more reliable, and reducing crowding.
  - More repairs and maintenance to ensure the safety, frequency, and reliability of Muni vehicles; includes keeping up to date on maintenance work and rebuilding the aging rail network.
  - Improving safety and access to ensure transit service is inclusive and that the streets are safe for walking.

# Input from the Policy & Governance Committee

## STRENGTHS

- Amazing staff – passionate and resourceful
- Willingness to try new ideas and pushing to improve
- Put out good transit service, regular service users have what they need

## WEAKNESSES

- Hard keeping staff
- Serve mainstream mobility needs, but need to accommodate those that are not able-bodied or have other needs, including women and families
- Missing regular positive communications
- Individuals are working hard but agency not meeting standards on project delivery

## OPPORTUNITIES

- MTA support from the city
- New projects are completing soon and will show people what a difference these improvements can make
- Build relationships with other decision makers in the city
- Be imaginative and be visionaries to change our environment

## THREATS

- Affordability of the city
- Financial instability
- MTA often the scapegoat for the city
- Push back from changes like Muni Forward projects, despite demonstrable benefits to ridership
- Financial standing and trust with the communities

# The Citizens' Advisory Council's Perspective

## Agency challenges:

- Accountability
- Need a dedicated source of funding to fight climate emergency and deliver consistent service
- Agency needs to ensure major projects and expenditures add value
- Transit travel times are inconsistent
- There is a lack of transparency in agency decision-making
- Agency needs better communications with the public
- Commit to something and not relitigate
- People need to feel safe and comfortable when walking and on transit
- Being honest and transparent

## What to focus on:

- Improving and adding back transit service and more accessible stops
- Increase ridership
- Support low-income communities reliant on transit
- Ensure quality of transit service is available before making it harder to drive
- Facilities updates to serve staff needs
- Reduce traffic congestion
- Fostering trust means spending the public's money wisely
- Improve pedestrian safety
- Saw fast changes under COVID and need to continue that responsiveness
- Outreach should influence the project; cast a wide net and not just in immediate area



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# Internal Staff Engagement

- OREI Listening Sessions
- Division SWOT discussion

# Overview of the SFMTA Division

## SWOT Discussions – *August 2021*

### STRENGTHS

- The service we put out and continue to put out every day through COVID is tremendous
- Communication and collaboration with other divisions was stronger under this crisis
- The pandemic forced people to work together and we are doing it extremely well
- Resiliency - so many people stepped up to get jobs finished, people worked outside their usual silos
- Strong peer comradery, pride, and support
- Proactive people integrating equity into decision-making, establishing affinity groups, and working on implementing the REAP



# Overview of the SFMTA Division

## SWOT Discussions – August 2021

### WEAKNESSES

- Lack of prioritization - focus is always what is on fire; making it harder to identify and move forward on things that matter
- Hiring process is complex, opaque, and takes too long
- Lack of succession planning / need to foster and support the next leaders; establish job and promotive opportunities from the apprentice to the manager level
- No consistent and inclusive process for how decisions and policies are made
- Overworked staff's morale is low due to burnout and limited staffing
- Both internal/external need significant investment and improvement to meet the needs of staff and the public
- Need to foster connections across divisions, take time to understand other parts of SFMTA, have cross trainings; "walk a day in my shoes", etc.
- Uncertainty around staff telecommuting practices
- Fatigue amongst our leaders championing equity in the organization
- Not proactive and consistent with planning and public engagement

# Overview of the SFMTA Division SWOT Discussions – *August 2021*

## OPPORTUNITIES

- Supporting and recognizing frontline workers
- Building on recent work across divisions/citywide more than ever; bridges were built during the pandemic by delivering services under stress
- The pandemic created opportunities to build common goals and unity across the agency
- Several major projects are coming online next year; positioning us to improve service along with communications and trust with the public
- Leveraging new technologies to operate in this new environment; may be options for long-term use for staff and with the public
- Hiring many new staff members - new energy and new ideas can support positive shift in workplace culture
- Adapting to changes in travel patterns resulting from telecommuting

# Overview of the SFMTA Division

## SWOT Discussions – *August 2021*

### THREATS

- Continuous physical, emotional, financial crisis due to the pandemic
- Reduction in revenues and a changing tax base leading to financial challenges and uncertainty
- Riders and staff not feeling safe and free from harassment when travelling in the city
- Worsening public perception of the agency and interest in “going back to where we were” regarding service
- Lack of trust in government in general and in the agency to deliver projects
- Political forces that can drive us to assignments outside scoped workplans
- Cost of living and affordability of San Francisco
- Venture capital-backed mobility options that do not share our goals; uncertainty and little control over the autonomous vehicles



# Strategic Plan Elements

- Agency Vision
- Values and Metrics
- Strategic Goals

# Vision

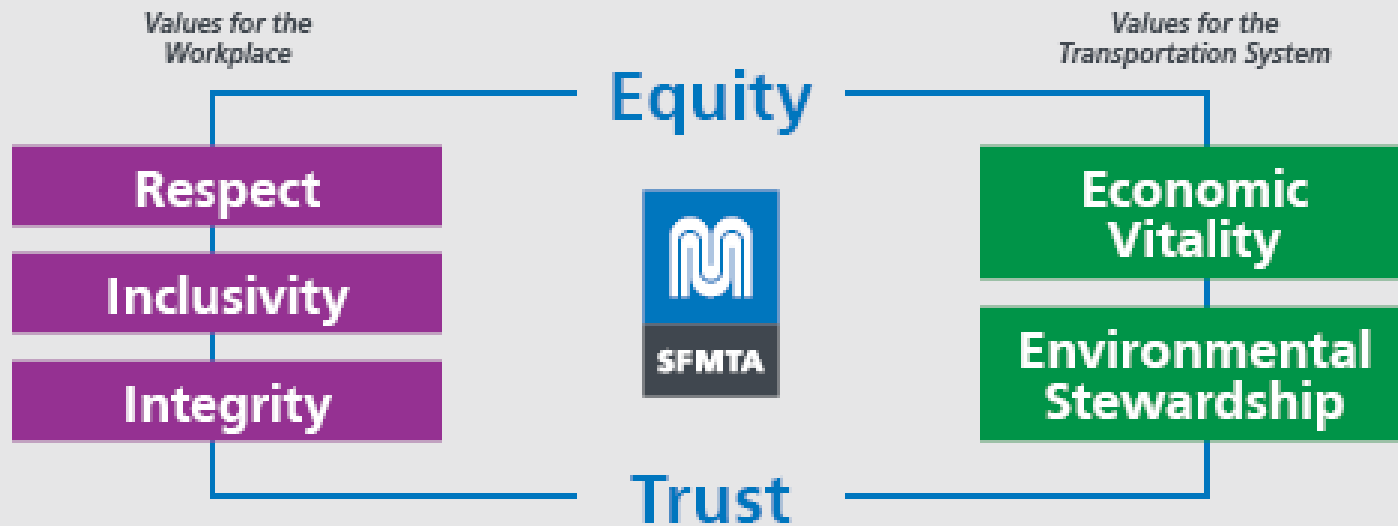
**A city of diverse and vibrant neighborhoods seamlessly connected by safe, reliable, affordable transportation for all.**

- Gets people where they need to go
- Supports the city's economy
- Supports racial, social and transportation equity
- Provides options that work for all
- Prioritizes transit, walking and bicycling
- Combats climate change

This transportation network is the foundation a more diverse, equitable, culturally vibrant, healthy, economically thriving and innovative San Francisco and Bay Area.

# Agency Values

*As the transportation agency for one of the most vibrant and progressive cities in the world, our values reflect the city we serve.*



# Equity

Value & Definition	Proposed Metrics
<p><b>Equity:</b> Correction of racial and social inequities and prioritization of those with the most need.</p>	<ol style="list-style-type: none"> <li>1. % emerging mobility services coverage in Communities of Concern</li> <li>2. % of scheduled Muni service hours delivered along Equity Routes</li> <li>3. \$ investments in Equity Strategy Neighborhoods</li> <li>4. % of eligible population utilizing free or discounted Muni fare programs</li> <li>5. Transit access to essential jobs and educational opportunities in Equity Strategy Neighborhoods</li> </ol>
<p><b>Accessibility:</b> Focus on the needs of those with the fewest mobility choices, including seniors and individuals with disabilities, to ensure access to all transportation modes.</p>	<ol style="list-style-type: none"> <li>1. Paratransit on-time performance</li> <li>2. Operational availability of elevators &amp; escalators at Muni stations</li> </ol>
<p><b>Safety:</b> Streets and mobility free from injury and harm.</p>	<ol style="list-style-type: none"> <li>1. Traffic fatalities</li> <li>2. Muni collisions per 100,000 miles</li> <li>3. SFPD-reported Muni-related crimes per 100,000 miles</li> </ol>
<p><b>Inclusivity:</b> Community engagement to understand needs and shape agency priorities.</p>	<ol style="list-style-type: none"> <li>1. % Muni customer feedback cases addressed within timeliness standards</li> <li>2. % of outreach efforts utilizing two-way communications</li> </ol>

# Trust

Value & Definition	Proposed Metrics
<b>Trust</b> : Strengthening the social and cultural connections of the city and building confidence in the agency.	<ol style="list-style-type: none"><li>1. Customer rating: % of positive customer sentiment</li><li>2. Customer Commendations/Complaints</li></ol>
<b>Accountability</b> : Responsible stewardship of public funds through efficient provision of projects and services that meet the needs of the public.	<ol style="list-style-type: none"><li>1. % of capital projects completed on time and within budget</li><li>2. % of streets-related customer requests in commercial corridors addressed within timeliness standards</li></ol>
<b>Transparency</b> : Clear communications with the public about the agency data, performance and decision-making processes.	<ol style="list-style-type: none"><li>1. Community rating: Feeling of being informed about SFMTA projects</li><li>2. % of Projects Using Enhanced Outreach</li><li>3. Language Accessibility for Activities and Print</li></ol>



# Values for the Workplace

Value & Definition	Proposed Metrics
<p><b>Respect:</b></p> <ul style="list-style-type: none"> <li>We are courteous and constructive in our treatment of others.</li> <li>We recognize our colleagues and their contributions are vital to the agency.</li> <li>We listen and directly engage our colleagues and the public to understand their needs and deliver effective services.</li> </ul> <p><b>Inclusivity:</b></p> <ul style="list-style-type: none"> <li>We seek a variety of identities, abilities, and interaction styles to promote a diverse and fair workplace.</li> <li>We operate from the context of teamwork and positive intent.</li> <li>We serve the public and address historic inequities in transportation by including all communities in the agency's decision-making processes.</li> </ul> <p><b>Integrity:</b></p> <ul style="list-style-type: none"> <li>We are accountable for and take ownership of our actions.</li> <li>We are responsive and honor our commitments to our colleagues and stakeholders.</li> <li>We are transparent and honest in everything we do, from internal operations to external delivery.</li> </ul>	<ol style="list-style-type: none"> <li>Employee rating: Overall employee satisfaction</li> <li>Employee rating: My opinions and ideas are valued.</li> <li>Employee rating: Our workplace culture supports my health and wellbeing.</li> <li>Employee rating: People from all backgrounds and identities have equitable opportunities to advance in their career at the SFMTA.</li> <li>Employee rating: If I raise a concern about discrimination or harassment to my manager/supervisor, I am confident they would take appropriate action.</li> <li>Employee rating: When the SFMTA makes changes, I understand why.</li> <li>REAP: % of budget allocated towards employee resources and development</li> <li>REAP: # training sessions administered</li> <li>REAP: # training sessions completed</li> <li>REAP: Utilization rates of wellness activities</li> <li>Workforce vacancy rate</li> <li>Length of time to hire</li> </ol>

# Economic Vitality

Value & Definition	Proposed Metrics
<p><b>Economic Vitality:</b> Reliable transportation services that support the city and its economic recovery, and a street system that maximizes the movement of people and goods.</p>	<ol style="list-style-type: none"> <li>1. % metered hours that meet parking occupancy targets</li> <li>2. % of contract \$ awarded to DBEs/LBEs</li> <li>3. Curb productivity</li> <li>4. Right-of-Way Efficiency (Passenger Miles Traveled/Vehicle Miles Traveled)</li> </ol>
<p><b>Service Quality:</b> Convenient and safe transit and other services that deliver a positive customer experience.</p>	<ol style="list-style-type: none"> <li>1. % of scheduled Muni service hours delivered</li> <li>2. Muni on-time performance</li> <li>3. % of trips meeting Headway Adherence</li> <li>4. % of trips above capacity</li> <li>5. Service variability</li> </ol>
<p><b>Resiliency:</b> A transportation system prepared for rapid economic, environmental and social change.</p>	<ol style="list-style-type: none"> <li>1. Muni mean distance between failure</li> <li>2. % of capital budget towards State of Good Repair</li> <li>3. Asset condition across key asset classes</li> <li>4. Deferred infrastructure replacement</li> </ol>

# Environmental Stewardship

Value & Definition	Proposed Metrics
<p><b>Environmental Stewardship:</b> Protection of the environment and improving the quality of life in San Francisco.</p>	<ol style="list-style-type: none"> <li>1. Agency resource consumption</li> <li>2. Agency waste diversion rate</li> <li>3. Transportation sector carbon footprint (metric tons CO2e)</li> </ol>
<p><b>Livability:</b> Implementation of the Transit First Policy to make getting around by Muni, walking and biking easy.</p>	<ol style="list-style-type: none"> <li>1. Muni ridership (average weekday ridership)</li> <li>2. Average weekday bicycle trips</li> <li>3. % coverage of bus stops near ¼ mile walking distance</li> <li>4. % of Shared Mobility Neighborhood Coverage</li> <li>5. Average weekday taxi trips</li> </ol>
<p><b>Climate Action:</b> Implementation of policies and infrastructure to protect communities and reduce carbon emissions.</p>	<ol style="list-style-type: none"> <li>1. Transportation mode share</li> <li>2. % of low-carbon trips</li> <li>3. Greenhouse gas reductions from electric charging stations</li> </ol>

# Strategic Goals

## **1. Reduce disproportionate outcomes and resolve past harm towards marginalized communities.**

Center racial equity in all areas of operations and decision-making to prioritize the advancement of racial, social and transportation equity in every decision taken by the agency.

## **2. Create a work environment that is responsive, equitable and inclusive.**

Foster a welcoming and professional culture that promotes supportive and respectful working relationships for all staff members.

## **3. Recruit, hire and invest in a diverse workforce.**

Be an employer of choice in the region to attract and retain the staff needed to deliver excellent services.

# Strategic Goals

## **4. Make streets safer for everyone.**

Eliminate traffic deaths, reduce severe injuries and ensure marginalized and vulnerable populations can move freely without fear of harassment, violence or injury on all modes of travel.

## **5. Deliver reliable and equitable transportation services.**

Connect communities of all backgrounds to opportunities and manage the streets by focusing on the experience.

## **6. Eliminate pollution and greenhouse gas emissions by increasing use of transit, walking and bicycling.**

Promote mode shift and use the public spaces efficiently to support the city's climate action efforts and align land use, housing and transportation policies.

# Strategic Goals

## **7. Build stronger relationships with stakeholders.**

Cultivate and maintain strong relationships to meet community needs, center racial equity and ensure that public input is inclusive of marginalized communities and populations underserved by the transportation sector.

## **8. Deliver quality projects on-time and on-budget.**

Deliver projects more efficiently and effectively to establish public trust in the agency.

## **9. Fix things before they break and modernize systems and infrastructure.**

Restore, maintain and optimize the infrastructure, fleets, facilities and street rights-of-way.

## **10. Position the agency for financial success.**

Ensure that near-term resource allocation is efficient and secure reliable revenue to meet the city's long-term transportation vision.



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# Strategic Plan Implementation

- Coordination with the budget development process
- Plan evaluation and reporting

# Coordination with the Budget

- Establishes a consistent approach for how the state, regional, and local policies are implemented.
- Guides prioritization in the agency's financial planning efforts
- Identifies and develops initiatives for inclusion in the budget
- Sets targets for each of the metrics based on the resources allocated in the budget
- Informs individual staff performance plans to allocate the budgeted projects to staff. In this way, all agency plans, programs and projects will support the achievement of the goals and uphold the values outlined in the Strategic Plan.



# Evaluation and Reporting

Will be a living document that can be updated as needed to respond to the constantly evolving city and region.

Will continue to fulfill our Charter-mandated reporting requirements and track progress towards upholding the values:

- Monthly online updates on the metrics
- Quarterly progress updates and metrics reports
- Semiannual Controller's Office reporting
- SFMTA Annual Report
- Biennial Municipal Transportation Quality Review

Will continue frequent internal status meetings to discuss the metrics and progress made on initiatives.

# Upcoming Milestones

Date	Milestone
September 28	<b>Policy and Governance Committee:</b> Discussion of the Strategic Plan
November 2	<b>SFMTA Board of Directors Meeting:</b> Anticipated adoption of the Strategic Plan
Fall 2021	<i>Rollout of the Strategic Plan</i> <i>Coordination with budget development</i>