



Fiscal Year 2022-23 Short Range Transit Plan

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Fiscal Year 2022-23 Short Range Transit Plan

1. Pre-Pandemic State of Service – FY 2018-19

Prior to the pandemic, the SFMTA Transit Division -- aka the San Francisco Municipal Railway, or Muni -- operated a total of 76 fixed routes. The system served diverse travel markets, ranging from Rapid (limited-stop) and local (all-stop) routes in corridors with two-way, all-day demand for transit to commuter-oriented peak period- and peak direction-only express routes, express special-event services, and late-night Owl routes. The fixed-route network also consisted of a variety of transit modes and vehicles, including light rail (the Muni Metro system), historic streetcars (the F Line), cable cars, hybrid buses, and electric trolleybuses.

The Muni system also consists primarily of "radial" routes connecting outlying neighborhoods to the downtown core and "crosstown" routes linking neighborhoods outside of downtown. Pre-pandemic, peak-period commuter demand on routes serving downtown was a major driver of both ridership and service allocation, on both all-day routes that operated more frequently during peak periods as well as peak-only express routes that provided additional capacity in the busiest radial corridors.

As of calendar year 2019, Muni was the eighth-largest transit system in the United States as measured by average weekday ridership, with an average of approximately 710,000 daily boardings. In that same year, Muni provided a total of 3.56 million hours of revenue service.



Fiscal Year 2022-23 Short Range Transit Plan

2. Current State of Service – FY 2022-23

In March 2020, shortly after implementation of the City's shelter-in place order, most Rapid (i.e., limited-stop) and express routes were suspended, and rail lines were replaced by bus service. In April, service was further reduced to a "Core Service Network" of 17 routes that carried the heaviest ridership and provided citywide access to essential workers. Since then, service has been restored on an incremental basis.

Service planning decisions made during the pandemic were based on a data-driven approach informed by pandemic-specific concerns, such as physical distancing and access to medical facilities. They were also guided by the SFMTA Service Equity Strategy, which prioritizes transit service in Equity Neighborhoods with high proportions of people of color and people from low-income households.

Once all currently planned service changes are implemented (see 2022 Muni Service Network below), service levels will have returned to approximately 82 percent of pre-pandemic levels, as expressed in terms of revenue service hours, and 93 percent, as expressed in terms of revenue service miles¹. We have been able to restore more service miles through efficiency improvements such as 15 new miles of transit-only lanes as well as opportunities for more efficient scheduling of operators. However, the current network is different from the pre-pandemic system in key ways.

Muni service compared to pre-COVID:

Revenue service hours: 82%

Revenue service miles: 93%

Travel time and reliability investments like transit-only lanes have significantly improved Muni efficiency.

The Central Subway opened for weekend service on November 19, 2022 and will open seven days per week in January. However, service on other Muni Metro lines remains below pre-pandemic levels, and most peak-period express services have not yet been restored. Additionally, some pre-existing routes have been modified, and new routes have been added, such as the 15 Bayview Hunters Point Express , which increases job access to Bayview residents.

In fall 2021, the agency completed a comprehensive public process to inform upcoming service changes, including the restoration of all pre-pandemic connections. The agency is committed to implementing these changes as soon as resources are available, and this will represent the new Muni system baseline service. Once implementation of this 2022 Muni Service Network has been completed, the agency will begin an updated service planning process that will take into account

¹ As estimated using Remix software. Note that these figures were used as projections for FY23 in the accompanying spreadsheet.



Fiscal Year 2022-23 Short Range Transit Plan

evolving travel patterns and trip choices, and will include additional community outreach. This process will be used to develop up to three route network "visions" that may serve as the basis for a future ballot measure or other strategy to increase operating revenues.

During the pandemic, the SFMTA also made policy and capital changes to improve transit speed and reliability, including major investments in transit-priority streets design (through the completion of the Van Ness Bus Rapid Transit project and Temporary Emergency Transit Lanes program, among others) and a shift from schedule-based to headway-based management of operations. The agency has also made major investments in State of Good Repair maintenance, including through its quarterly Fix-It-Week program that replaces late-night subway service with buses to extend the maintenance work window from seven to 10 days.

The most obvious change to demand for transit in San Francisco, and in turn to the Muni system, has been the reduction in demand for peak-period travel to and from downtown office buildings. At the same time, demand for all-day crosstown travel between neighborhoods has largely returned, in corridors such as Mission and 16th Street/Fillmore. Through fall of 2022, for example, the 22-Fillmore line averaged around 100% of pre-COVID ridership weekdays, and around 110% weekends.

As of October 2022, average weekday boardings systemwide had recovered to 58 percent of pre-pandemic levels. Weekend ridership, however, has recovered at a faster rate, to 71 percent of pre-pandemic levels.



Fiscal Year 2022-23 Short Range Transit Plan

3. Scenario Planning Concepts – FY 2023-24 Through FY 2027-28

This chapter describes how Muni service might change under the three five-year financial scenarios developed by MTC. The scenarios cover only a relatively narrow range of possibilities, and the MTC revenue projections associated with each scenario were escalated from Fiscal Year (FY) 2019 budgets based on historically low inflation rates. The scenarios are:

- **Robust Recovery:** There is adequate funding to return overall revenue to 100 percent of pre-pandemic levels, with escalation. Note that due to the inflation issue described above, MTC's revenue projections for this, its best-case scenario, actually amount to a decrease in funding from current levels.
- **Revenue Recovery, with Fewer Riders:** Federal relief funds are eventually exhausted, although other funds recover to pre-pandemic levels. However, farebox revenue remains stagnant (20-50 percent below pre-pandemic levels, depending on current status) for the next five years.
- **Some Progress:** Federal relief funds are eventually exhausted and total revenue available to the agency is 15 percent below pre-pandemic levels for the next five years. This, the MTC's worst-case scenario, does not assume a reduction in revenues as severe as might be possible given current trends.

Following are brief descriptions of potential service changes under each of MTC's financial scenarios. It should be emphasized that MTC's scenarios assumes only relatively modest changes to revenue – neither increases (its best-case projections for FY24 are actually below the SFMTA's adopted budget for FY23), nor decreases on the scale of what might be possible under the "fiscal cliff" scenario described below. For this reason, the service changes described below include neither expanded service nor a reduction in revenues so severe that suspension of routes might be necessary.

Robust Recovery

Although this scenario is described by MTC as "robust," the revenue projections developed by MTC actually represent a slight reduction in revenues. Therefore, this scenario would not allow for what the SFMTA or San Francisco might describe as a "robust recovery" allowing the agency to expand service to address climate and equity goals. Under this scenario, operating revenues would remain



SFMTA

Fiscal Year 2022-23 Short Range Transit Plan

close to current levels, and little change to service would be required. The 2022 Muni Service Network would remain in place with only minor adjustments based on the process described below (including analysis of demand and operational concerns, completion of capital projects and staff availability).

Revenue Recovery, with Fewer Riders

Under this and to a greater extent under the following scenario, service would have to be reduced. As was previously noted, it is unlikely that routes currently in operation or currently planned to return to operation would be suspended unless revenues were to be reduced substantially. However, under this scenario, reductions to service levels (including both frequencies and spans of service) would have to be made based on analysis of relative demand. Service levels on routes with high ridership would be protected to the extent possible.

Some Progress

Under this scenario, additional reductions in service would be required. It may be necessary to reduce service on relatively high-ridership local routes in corridors where Rapid service also operates.

The SFMTA Transit Division's priorities and goals for Muni service would remain the same under any scenario, as they are based on adopted plans and policies including the City and County of San Francisco's Transit First Policy, the SFMTA Strategic Plan, and the SFMTA Service Equity Strategy. Additionally, until the local economy has fully recovered from the COVID-19 pandemic, the SFMTA will continue to prioritize service supporting that recovery, including full restoration of downtown employment.

As was noted in the previous chapter, in fall 2021 the agency completed a comprehensive public process to inform upcoming service changes. The 2022 Muni Service Network that resulted from this process is now in the process of being implemented. SFMTA is committed to expanding service beyond the 2022 Muni Service Network if additional funding becomes available, as more service is needed to meet our long-term equity and climate goals. The SFMTA's current focus is excellent, reliable service delivery; safety and security for our workforce and passengers; improved state of good repair; and new revenue strategies. We are doing contingency planning for all likely revenue scenarios, ranging from service levels better than pre-COVID to stabilization of service. If no new funding sources are found to minimize impact of our coming "fiscal cliff."

Implementation of the 2022 Muni Service Network has been delayed by shortages of both transit operators and mechanics, due to high pre-pandemic vacancies and the impacts of the pandemic on



SFMTA

Fiscal Year 2022-23 Short Range Transit Plan

hiring plans. The SFMTA currently anticipates full implementation of the plan in 2024. However, the agency currently projects a Fiscal Year 2025 deficit of \$76 million, and as part of regular fiscal reviews, controls will be put in place as warranted, potentially including delays in hiring.

Once implementation of the 2022 Muni Service Network has been completed, the agency will begin an updated service planning process that will take into account evolving travel patterns and trip choices, and will include additional community outreach. This process will be used to develop up to three route network "visions" that may serve as the basis for a future ballot measure or other strategies to increase operating revenues.

In the meantime, service changes will depend on whether demand and revenues increase or decrease. The process for proposing service changes based on increases or decreases in demand and/or revenues is described in the following paragraphs.

If the status quo were to more or less continue -- if both revenues and levels and patterns of demand were to remain relatively constant -- minor service changes would generally be made three times per year (winter, summer and fall), as was the pre-pandemic practice. In addition to the priorities and goals described above, changes made as part of this regular cycle would typically be based on factors including demand (loads), operational issues (such as subfleet availability and allocation of service by operating division), completion of capital projects² and, as previously noted, staff availability. Such changes would necessarily be revenue neutral, meaning resources would be reallocated to address needs while minimizing negative impacts.

If a major increase in demand did occur -- for example an increase in downtown office occupancy rates -- but there were no major changes in revenue, then trade-offs might have to be made, for example reductions in service in some places to offset increases elsewhere. Note, however, that increasing demand would increase farebox revenues, mitigating this problem somewhat, although historically the farebox has covered less than 30% of Muni's cost of delivering service.

If demand for transit were to increase while, at the same time, SFMTA revenues were to decrease substantially, then the agency might be unable to meet demand. There is some concern that the City's General Fund, a major source of operating revenues, might be significantly impacted in the near term by factors including a significant reduction of tax revenues from offices, hotels, and convention-related business compared to pre-pandemic levels, a potential national recession, rising interest rates, ongoing inflation, and/or impacts from the Ukraine war. This situation has been described by some as a "fiscal cliff."

² The SFMTA will soon be making major service changes based on completion of a major capital project, the Central Subway. However, upon its completion, the agency will have no major capital expansion projects under construction.



SFMTA

Fiscal Year 2022-23 Short Range Transit Plan

If revenues were to increase, then SFMTA staff would respond with new service plans. Internal discussions have already occurred regarding potential changes to service to reflect post-pandemic travel trends. Changes discussed include expanding all-day, two-way limited-stop Rapid service as an alternative to traditional peak-period, peak-direction express services and implementation of the "Five-Minute Network" of frequent routes throughout the city developed as part of the ConnectSF medium- and long-term planning process. However, most of these changes would require additional revenues. Implementation of new Rapid services such as the 1R California Rapid or 29R Sunset Rapid routes would require a additional revenues for operating costs. Implementation of new Rapid services would also require capital investments to support expanded service, including the addition of transit priority infrastructure along any corridor providing a combined five-minute service or better. (The Five-Minute Network is described here: [https://connectsf.org/wp-content/uploads/ConnectSF Transit Strategy FINAL-20211209-1.pdf](https://connectsf.org/wp-content/uploads/ConnectSF_Transit_Strategy_FINAL-20211209-1.pdf))

A significant reduction in revenues, meanwhile, could result in service plans similar to those implemented during the pandemic (detailed information on changes to Muni service during the pandemic can be found at <https://www.sfmta.com/project-updates/covid-19-related-service-changes>). Pandemic-era service changes were based in part on COVID-19-specific concerns such as physical distancing and access to medical facilities. However, they were also based on both limited demand and limited revenues.

Initially, this resulted in the Core Service Network described in the previous chapter, 17 Muni routes in major corridors providing basic coverage throughout the city. The series of service increases that followed were based on varying funding levels, and that process of calibrating service plans to funding levels would inform any future planning for reduced funding.

At the same time, pandemic-era service changes were based on limited demand, in particular for peak service to and from downtown. Replacing rail service with less expensive bus service was feasible because less capacity was needed in these corridors at peak times. Even today, rail service is operating at lower levels than prior to the pandemic. If downtown office occupancy rates were to increase substantially, more capacity would be needed (although as previously noted, more farebox revenue would also be available).

The Muni system as it existed in Spring and early Summer 2022, prior to the major service changes implemented in July, might serve as a guide for a reduced network. In July, several routes that had been suspended throughout the pandemic were partly or fully reintroduced, while other routes were modified.

However, if revenues were not substantially reduced, staff would seek to ensure that services were not suspended. Instead, service changes would likely take the form of changes to service levels –



SFMTA

Fiscal Year 2022-23 Short Range Transit Plan

headways and spans of service. As MTC's financial scenarios cover only a relatively narrow range of possibilities, and do not include a "fiscal cliff" scenario under which revenues would be substantially reduced, the service changes envisioned under each scenario above are limited to changes to service levels.

Additionally, it should be reiterated that Muni service was actually expanded in key areas during the pandemic, for example by introducing a new Route 15 Bayview Hunters Point Express, and it is unlikely that these changes would be reversed, as they were developed in response to changing demand and an increased focus on equity. (For this reason, even if funding for operations were restored to 100 percent of pre-pandemic levels plus escalation, the Muni system would likely not be identical to what existed prior to the pandemic.)

In the attached spreadsheet, future year projections of revenue hours and revenue miles vary by scenario, but are held constant year over year, as annual increases in operating cost per hour for each mode are assumed to reflect MTC's assumed escalation rate for overall operating budgets of 2.2 percent. (Note that because MTC's projected operating budgets for FY24 are lower than the SFMTA's adopted budget for FY23 under every scenario, numbers of hours and miles are initially reduced under every scenario.) Numbers of routes, route miles, total vehicles, maximum vehicles in service and numbers of employees, meanwhile, are held constant at FY23 levels across all scenarios and over time. This is because, as was previously stated, any changes based on reductions in revenue on the scale of that envisioned by the MTC scenarios would likely take the form of service reductions, or longer headways and/or shorter spans (the maximum number of vehicles in service would, in reality, be reduced in this case, but as there is not yet a service plan, no projections have been developed). While reduced revenues could result in a reduction in fleet and staff sizes, the SFMTA would strive to avoid any reduction in these critical resources. Finally, ridership forecasts for Scenario 2 are consistent with MTC guidance, while ridership forecasts for Scenarios 1 and 3 are based on revenues.



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Fiscal Year 2022-23 Short Range Transit Plan

Appendix: Bus Stop Guidelines Update

The SFMTA's Bus Stop Guidelines, initially developed in 1990 and most recently updated in 2011, provide guidance for the location and design of Muni stops. Excerpts from the Bus Stop Guidelines are typically published in the Short Range Transit Plan. The following language is proposed to be added to the Guidelines:

Each transit stop in the system should have unobstructed access to the front door of the transit vehicle. At stops with access from the curb, at least 20 feet of clear curb should be available to provide unobstructed access to the front door of a bus or train. At existing stops without direct access to the curb, additional measures should be taken to provide unobstructed access to the front door of the transit vehicle, such as installing full-length bus zones or constructing transit bulbs. These additional measures will be implemented over time, with stops prioritized for implementation by SFMTA Accessible Services based on a data-driven process and requests from the public, particularly seniors and persons with disabilities.