

THIS PRINT COVERS CALENDAR ITEM NO. : 13

**SAN FRANCISCO
MUNICIPAL TRANSPORTATION AGENCY**

DIVISION: Transit Services

BRIEF DESCRIPTION:

Adopt a Muni Service Equity Policy requiring the development of a biannual Service Equity Strategy in conjunction with the SFMTA budget process to document transit service performance issues in low income and minority neighborhoods, monitor progress to improve service to these communities over time, and link improvement strategies to capital and transit service funding requests as needed.

SUMMARY:

- This policy builds on SFMTA’s strong foundation for analyzing the needs of low income and minority customers, such as the Transit Effectiveness Program’s (TEP) service equity analysis and the annual Title VI monitoring program.
- The Strategy will focus on improving Muni service in neighborhoods with high concentrations of low income households, minority residents, residents with disabilities, and households without access to personal automobiles.
- A baseline will be established for Muni routes serving targeted neighborhoods and will include data for on-time performance, service gaps, crowding, capacity utilization, customer satisfaction, and travel times to/from key destinations such as grocery stores and hospitals.
- Key issues will be determined and strategies will be developed to improve lower performing routes and improve overall service quality.
- The SFMTA Board will review and approve the Service Equity Strategy every two years and the budget will be informed by the priorities in the Service Equity Strategy.
- A service evaluation that tracks the effectiveness of the service equity strategies by documenting year-over-year progress against the baseline will be presented to the SFMTA Board and the SF Transportation Authority (SFCTA) Board annually.

ENCLOSURES:

1. Service Equity Strategy Policy
2. Service Equity Strategy Presentation

APPROVALS:

DATE

DIRECTOR _____

4/29/14

SECRETARY _____

4/29/14

ASSIGNED SFMTAB CALENDAR DATE: May 6, 2014

PAGE 2.

PURPOSE

Adopt a Muni Service Equity Policy requiring the development of a biannual Service Equity Strategy in conjunction with the SFMTA budget process to document transit service performance issues in low income and minority neighborhoods, monitor progress to improve service to these communities over time, and link improvement strategies to capital and transit service funding requests as needed.

GOAL

The Service Equity Strategy focuses on the SFMTA's core value of social equity and access, which is infused throughout the Strategic Plan. It will address the following SFMTA Strategic Plan goals and objectives:

- Goal 2: Make transit, walking, bicycling, taxi, ridesharing and carsharing the preferred means of travel
 - Objective 2.1 Improve customer service and communications
 - Objective 2.2 Improve transit performance

- Goal 3: Improve environment and quality of life in San Francisco
 - Objective 3.3 Allocate capital resources effectively
 - Objective 3.4: Deliver services efficiently

- Goal 4: Create a workplace that delivers outstanding service
 - Objective 4.4 Improve relationships and partnerships with our stakeholders

DESCRIPTION

SFMTA is committed to continually improving Muni service quality across San Francisco to better meet the unique needs of San Francisco's rich fabric of neighborhoods. Muni service is especially critical to customers living in neighborhoods with high concentrations of low income households, minority residents, residents with disabilities, and households without personal automobiles. Based on customer survey data, over half of Muni riders reported that they live in low income households¹ compared to a citywide average of only 31 percent (U.S. Census, 2010). Additionally, over half of survey respondents reported that they do not have access to a personal vehicle. The customer survey data also revealed a strong correlation between low-income households and customers with disabilities, with almost 80% of customers with disabilities indicating that they were from low income households.

Building on the Transit Effectiveness Project's (TEP) equity analysis, SFMTA's annual Title VI monitoring program, and focused meetings with social equity advocates over the last several months, a Muni Service Equity Policy was developed to strengthen SFMTA's commitment to minority and low-income neighborhoods and continually improving transit service.

¹ Low income household is defined as a household earning less than 200% of the 2013 federal poverty level or less than \$47,000 per year for a family of four

Service Equity Strategy Overview

The proposed Muni Service Equity Strategy is a neighborhood based approach to improving Muni routes most critical to communities with high concentrations of low income and minority residents. The proposed policy creates neighborhood specific strategies to improve service and integrates service and capital needs into the biannual budget process. SFMTA will be held accountable for delivering the recommended strategies for improving service through annual reporting of performance and progress to the SFMTA Board and the SFCTA Board. The Service Equity Strategy will complement, but will not replace, the annual service monitoring program that SFMTA conducts as part of SFMTA's Title VI program.²

Methodology

Using the most recent U.S. Census demographic data available, SFMTA will identify neighborhoods with large proportions of low income households, minority residents, residents with disabilities and households with limited personal vehicle access and use this information to select general neighborhoods where Muni access is most critical. This work is expected to be completed this spring in partnership with the social justice advocates whom have guided this effort to date.

After defining the focus neighborhoods, the most critical routes serving each neighborhood will be identified based on ridership, connections to key destinations, and community feedback. Demographic data will be summarized based on the 2013 Muni On-Board Customer Survey. In order to benchmark performance, an annual assessment will be conducted on key service performance metrics for each neighborhood's critical routes. Metrics will include:

- On-Time Performance
- Service Gaps
- Crowding/Capacity Utilization
- Travel times to/from key destinations such as the nearest grocery store, nearest major medical facility, City College, downtown, and nearest major park
- Customer satisfaction information

In addition to analyzing transit metrics during peak times, data will also be evaluated midday and in the late evening, as service performance is particularly impactful outside of the peak period due to decreased frequency. Analyzing multiple time periods will also capture the needs of customers who use transit to access jobs outside of the typical commuter period. Where available, the SFMTA will also analyze data, such as on-time performance for the route overall and in the focus neighborhoods. For the first year, baseline conditions by line and neighborhood will be established. Performance of each line will be compared to similar peer routes (e.g. Rapid routes compared to other Rapid routes) to identify service issues. An example of the performance metrics are on the following pages.

² The annual service monitoring program evaluates how all Muni routes are performing vis-a-vis the Agency's transit service standards. If minority routes are not performing as well as non-minority routes, a corrective program is established to correct the disparity. The annual service monitoring is included in the Triennial Title VI Program Update that is submitted to FTA.

Example of Performance Metrics for Select Neighborhoods by Line

	Neighborhood	Routes	Route Category	Average Weekday Ridership	On-Time Performance	% of Trips with Service Gaps	Capacity Utilization during PM Peak
1	Chinatown	30 Stockton	Local	32,400	56%	8%	52%
2		45 Union/Stockton	Local	11,700	63%	2%	88%
3		8X/8AX/8BX	Rapid	38,600	62%	7%	73%
4		10 Townsend	Local	5,500	59%	0%	93%
5		12 Folsom/Pacific	Local	4,200	61%	0%	50%
6		1 California	Rapid	26,000	65%	11%	85%
7	Tenderloin	27 Bryant	Local	7,900	57%	25%	61%
8		31 Balboa	Local	8,000	59%	21%	79%
9		19 Polk	Local	7,600	50%	26%	87%
10		38 Geary	Local	28,100	63%	16%	69%
11		38L Geary Limited	Rapid	27,100	72%	12%	81%
12	Bayview	44 O'Shaughnessy	Local	16,900	62%	19%	84%
13		54 Felton	Local	6,800	56%	18%	69%
14		23 Monterey	Local	5,000	59%	24%	52%
15		24 Divisadero	Local	11,400	62%	15%	69%
16		19 Polk	Local	7,600	50%	26%	87%
17		T Third (with K line)	Rapid	33,800	42%	22%	72%

Note: additional data, including midday and late evening metrics to be included in actual assessment.

Example of Travel Times to Key Destinations for the Bayview

Destination Type	Location	Minutes	Mile	Minutes/ Mile
Nearest Grocery Store	FoodsCo @ Williams & Phelps via 54	11	1	11
Nearest Hospital or Clinic	SF General Hospital via 44 & 9	24	2	12
Downtown	Market & New Montgomery via T	31	4	7
Nearest Large Park	McLaren Park via 54	22	2.5	9
City College	Via 44, 49	36	4	9

PAGE 6.

For each neighborhood, staff will develop strategies to address the top two or three performance issues. These issues will be vetted with the community and will likely differ across neighborhoods. For example, in Chinatown, a key issue is crowding. However, in some of the outer neighborhoods, travel time and service reliability are the top concerns. Based on the data analysis, staff will develop strategies to improve service performance, such as increasing route frequency to reduce crowding, focusing service management techniques to improve service reliability, and implementing capital improvements to prioritize transit on our crowded City streets. The solutions will draw on service, line management and capital investment strategies and in many situations, may draw on a combination of approaches. Initial recommendations will be drawn from TEP proposals and will help inform which TEP improvements are prioritized for early implementation.

Allocating Resources

In some instances, the strategies identified can be delivered through the reallocation of existing resources (e.g., focusing line management attention towards on-time terminal departures). In other instances, the strategies will require additional service or capital investment. Funding needs will be identified and the overall Muni Service Equity Strategy will be approved by the SFMTA Board prior to the two-year budget cycle and will inform the biannual operating and capital budget. In addition to equity needs, it is anticipated that other service objectives will also inform the budget development including ridership growth, overall system performance and conditions on the Rapid network. In difficult financial times, the Muni Service Equity Strategy may not recommend increased funding levels, but will focus on more effectively using available resources. If service reductions need to be considered, the Strategy will also guide how to consider the needs of low-income and minority neighborhoods.

Service progress and the effectiveness of the strategies will be monitored continually and reported annually to the SFMTA Board and SFCTA Board. Through regular monitoring, staff will adjust strategies to maximize results.

TIMELINE

Because the two-year budget was approved in April, the first Muni Service Equity Strategy will follow a different timeline. In subsequent years, the Strategy will fully align with the two-year budget cycle. Staff proposes the following timeline for FY15-FY16:

- May 6, 2014: SFMTA Board approval of Muni Service Equity Strategy
- Spring 2014: Work with social justice advocates to identify neighborhoods and establish baseline performance and key community needs. Initial equity strategies will draw from the Transit Effectiveness Project, which included a strong focus on the needs of low income and minority communities, and was informed by extensive community outreach.
- Winter 2015: Present baseline performance and key community needs, along with TEP strategies to SFMTA/SFCTA Boards
- Spring 2015: Conduct annual monitoring, review key performance issues and reaffirm strategies (and/or develop new strategies) for addressing service needs.
- Summer/Fall 2015: Conduct community outreach to review Year One progress, review

PAGE 7.

key performance issues and get stakeholder input on strategies

- Winter 2016: Present Year One progress and new proposals to SFMTA/SFCTA Boards
- Late Winter 2016: SFMTA Board adopts FY17-18 Muni Service Equity Strategy
- Spring 2016: SFMTA Board approves two-year budget informed by Service Equity Strategy

On an on-going basis, the performance analysis will kick off in the spring leading up to a budget cycle and will follow the timeline above. This ongoing effort will allow the SFMTA Board and other key stakeholders to track year-over-year progress and to allocate resources to meet the needs of transit dependent neighborhoods.

PUBLIC OUTREACH

As discussed briefly in the previous section, SFMTA staff worked closely with social justice advocates to develop the proposed Muni Service Equity Policy. Staff met every few weeks over the past three months with social justice advocates to create the proposed policy. The group included advocates from neighborhoods across San Francisco as well as regional advocates and staff from Supervisor Avalos' office.

As part of the Muni Service Equity Strategy, staff will conduct neighborhood based outreach on a biannual basis to determine if the key service issues identified by staff match community concerns. Based on this feedback, staff will refine proposed strategies. Outreach techniques will be tailored to each neighborhood and may include open houses, focus groups, presentations at neighborhood meetings, and meetings with community based organizations (CBOs). Outreach will actively engage customers with limited English proficiency (LEP). Staff will also work with SFMTA's Accessible Services division, as well as disability advocates, to confirm that the strategies consider the needs of customers with disabilities. While there is a strong correlation between disability and low-income status in San Francisco, there may be service issues unique to customers with disabilities that are not captured by the neighborhood based approach. Based on feedback from the Policy and Governance Committee, staff will review contracting with CBOs and advocacy groups as a strategy to actively engage communities.

The City Attorney's Office has reviewed this calendar item.

ALTERNATIVES CONSIDERED

Staff worked iteratively with social justice advocates to develop and refine the Muni Service Equity Policy. An initial approach focused primarily on route-based analysis. The neighborhood-based approach was preferred because it better captures how San Franciscans travel, relying on a package of routes to reach key destinations.

FUNDING IMPACT

The service equity strategies will inform the biannual budget process for the SFMTA Board of Directors. The budget request may include allocation of additional resources to improve service.

PAGE 8.

For the FY15/FY16 biannual budget, there is no impact. Once the baseline is approved, staff will reallocate approved budget resources if needed to implement the recommended strategies.

OTHER APPROVALS RECEIVED OR STILL REQUIRED

None.

RECOMMENDATION

Staff recommends adoption of a Muni Service Equity Policy requiring the development of a biannual Service Equity Strategy in conjunction with the SFMTA budget process to document transit service performance issues in low income and minority neighborhoods, monitor progress to improve service to these communities over time, and link improvement strategies to capital and transit service funding requests as needed.

SAN FRANCISCO
MUNICIPAL TRANSPORTATION AGENCY
BOARD OF DIRECTORS

RESOLUTION No. _____

WHEREAS, The SFMTA is committed to continually improving Muni service quality across San Francisco, including low income and minority neighborhoods where transit provides critical lifeline access for transit dependent customers; and

WHEREAS, A Service Equity Strategy will build on the strong social equity foundation that the SFMTA's Transit Effectiveness Project (TEP) equity analysis and SFMTA's annual Title VI monitoring program have established; and

WHEREAS, A Service Equity Strategy will focus on improving Muni service in neighborhoods with high concentrations of low income households, minority residents, residents with disabilities, and households without personal automobiles; and

WHEREAS, A Service Equity Strategy will complement, but will not replace, the annual service monitoring program that SFMTA conducts as part of the SFMTA's Title VI program; and

WHEREAS, The Service Equity Strategy will create neighborhood specific strategies to improve Muni service by addressing key issues facing targeted neighborhoods; and

WHEREAS, SFMTA will work with social justice stakeholders to determine neighborhoods to focus the Service Equity Strategy based on U.S. Census data and other relevant data sources to determine where high concentrations of low income, minority, disabled, and zero vehicle households are located; and

WHEREAS, SFMTA will establish baseline conditions for Muni service in selected neighborhoods and evaluate year-over-year progress compared to similar peer route performance; and

WHEREAS, Baseline conditions will assess metrics such as on-time performance, service gaps, crowding, customer satisfaction, and travel times to/from key destinations such as grocery stores, hospitals, City College, major recreation centers, and downtown; and

WHEREAS, SFMTA will review service performance, identify key issues facing Muni service in selected neighborhoods, create strategies to address key issues, and perform community outreach to verify key issues and adjust issues and strategies as needed; and

WHEREAS, The Service Equity Strategy will be presented and provided to the SFMTA Board for approval every two years; and

WHEREAS, Additional resources may be needed to implement the Service Equity Strategy and requests for necessary resources will be incorporated into the SFMTA's two year budget proposal for SFMTA Board approval; and

WHEREAS, A service evaluation that tracks the year-over-year progress of the Service Equity Strategy against the baseline will be reported to the SFMTA Board and SFCTA Board annually; now therefore be it

RESOLVED, That the SFMTA Board of Directors adopts the Muni Service Equity Policy requiring the development of a biannual Service Equity Strategy in conjunction with the SFMTA budget process to document transit service performance issues in low income and minority neighborhoods, monitor progress to improve service to these communities over time, and link improvement strategies to capital and transit service funding requests as needed.

I certify that the foregoing resolution was adopted by the Municipal Transportation Agency Board of Directors at their meeting of May 6, 2014.

Secretary, Municipal Transportation Agency
Board of Directors

Muni Service Equity Policy

Pursuant to SFMTA's core value of social equity and access, the SFMTA shall adopt a Service Equity Strategy every two years on the same cycle as SFMTA's biannual budget to assess Muni service performance in select low income and minority neighborhoods, identify major Muni transit-related challenges impacting selected neighborhoods with community stakeholder outreach, and develop strategies to address the major challenges. The Service Equity Strategy will complement, but will not replace, the annual service monitoring program that SFMTA conducts as part of the SFMTA Title VI program.

SFMTA shall develop performance targets for each strategy based on peer Muni route performance and track progress compared to baseline conditions, performance targets, and year-over-year progress. Performance metrics will include:

- On-Time Performance
- Service Gaps
- Crowding (also serves as a proxy for pass-ups)
- Capacity Utilization
- Travel Times to/from key destinations such as the nearest grocery store, nearest medical facility, City College, downtown, and nearest major park
- Customer satisfaction information

Metrics will include data by time of day (including midday and late evening). Where available, data will be evaluated for conditions within the neighborhood, as well as the route as a whole.

The Service Equity Strategy shall be presented to the SFMTA Board of Directors before the two-year budget request and the two-year budget request shall include, if needed, budget allocation requests to implement the Service Equity Strategy to the extent resources are available.¹ In difficult financial times, the Service Equity Strategy may not recommend increased funding levels, but will focus on more effectively using available resources. If service reductions need to be considered, the Equity Strategy will also guide how to consider the needs of low-income and minority neighborhoods. The Service Equity Strategy shall also be adopted by the SFMTA Board of Directors and presented for input to the San Francisco County Transportation Authority (SFCTA). The performance of routes and impacts of the strategies on performance included in the Service Equity Strategy shall be reported annually to the SFMTA Board of Directors and the SFCTA Board.

Beginning in spring 2014, staff will select neighborhoods based on percentage of low income households, private vehicle availability, race/ethnicity demographics, and disability status and

¹ In addition to equity needs, it is anticipated that other service objectives will also inform the budget development including ridership growth, overall system performance and conditions on the Rapid network.

establish a performance baseline. Subsequently, the Service Equity Strategy Policy requires the following steps as part of the Two Year Budget Cycle:

- Re-evaluate census data to determine if demographic changes warrant additional or fewer neighborhoods be evaluated. Summer/Fall Year 1
- Analyze performance data for key transit routes in each focus neighborhood and outline the top two-to-three Muni challenges and strategies to improve service performance. Document year-over-year progress against the baseline. Summer/Fall Year 1
- Conduct outreach to community stakeholders to confirm key Muni service issues in each neighborhood and adjust as needed. This may include community groups, community based organizations, stakeholder interviews, and community meetings. Fall Year 1
- Refine key issues on community input and finalize Service Equity Strategy. Winter Year 1
- SFMTA Board of Directors reviews and approves Service Equity Strategy. Winter Year 1
- SFMTA prioritizes resources to implement strategies as needed in conjunction with two year budget cycle. Spring Year 1
- Implement Service Equity Strategy and track results compared to baseline conditions and performance targets. Summer Year 1
- Adjust strategies as needed to meet goal. Summer Year 1 – Summer Year 2
- Report back to the SFMTA Board and SFCTA Board on results Fall/Winter Year 2
- Start process again in Summer/Fall Year 3

