

**THIS PRINT COVERS CALENDAR ITEM NO. : 13**

**SAN FRANCISCO  
MUNICIPAL TRANSPORTATION AGENCY**

**DIVISION:** Taxi and Accessible Services and Sustainable Streets Divisions

**BRIEF DESCRIPTION:**

Requesting the Board of Directors approve the Guiding Principles for Emerging Mobility Services and Technologies that will serve as a goals-based policy framework for assessing the benefits and impacts of these services and technologies, evaluating their ability to meet citywide goals, and providing guidance with respect to meeting these goals.

**SUMMARY:**

- A variety of mobility services and technologies have emerged over the past few years, from mobile applications that connect passengers with on-demand mobility services, shared ride van services, shared scooter services, to automated vehicles that are currently being tested on City streets.
- These new mobility services present the potential for both opportunities and challenges to the safe and sustainable movement of people and goods on the transportation network.
- With the goals of providing for safe, reliable, sustainable and equitable transportation choices, the SFMTA and San Francisco County Transportation Authority (SFCTA) have collaborated to develop the Guiding Principles for Emerging Mobility Services and Technologies.
- The Guiding Principles will provide a consistent policy framework, available to all stakeholders, to evaluate new mobility services and will be taken into consideration in all SFMTA decision, policies, and actions regarding Emerging Mobility Services and Technologies.
- The Guiding Principles will be used as a tool by staff to help guide these new services and technologies into alignment with city policies, while minimizing their potentially detrimental impacts on the city's transportation network.

**ENCLOSURES:**

1. SFMTA Board Resolution
2. Guiding Principles

**APPROVALS:**

DIRECTOR



**DATE**

7/12/2017

SECRETARY



7/12/2017

**ASSIGNED SFMTAB CALENDAR DATE:** July 18, 2017

## **PAGE 2.**

### **PURPOSE**

Requesting the Board of Directors approve the Guiding Principles for Emerging Mobility Services and Technologies that will serve as a goals-based policy framework for assessing the benefits and impacts of these services and technologies, evaluating their ability to meet citywide goals, and providing guidance with respect to meeting these goals.

### **GOAL**

Approval of Guiding Principles for Emerging Mobility Services and Technologies will support the Vision Zero Policy, San Francisco Transportation Plan (SFTP) and the following goals and objectives in the SFMTA's Strategic Plan:

Goal 1: Create a safer transportation experience for everyone

Objective 1.3: Improve the safety of the transportation system.

Goal 2: Make transit, walking, bicycling, taxi, ridesharing and carsharing the preferred means of travel

Objective 2.2: Improve transit performance

Objective 2.3: Increase use of all non-private auto modes.

Objective 2.5: Manage parking supply to align with SFMTA and community goals.

Objective 2.4: Improve parking utilization and manage parking demand

Goal 3: Improve the environment and quality of life in San Francisco

Objective 3.1: Reduce the Agency's and the transportation system's resource consumption, emissions, waste, and noise.

Objective 3.2: Increase the transportation system's positive impact to the economy.

Objective 3.4: Deliver services efficiently

Goal 4: Create a workplace that delivers outstanding service

Objective 4.2: Create a collaborative and innovative work environment.

Objective 4.4: Improve relationships and partnerships with our stakeholders.

Approval of Guiding Principles for Emerging Mobility Services and Technologies will support the following Transit First Policy Principles:

1. To ensure quality of life and economic health in San Francisco, the primary objective of the transportation system must be the safe and efficient movement of people and goods.
2. Public transit, including taxis and vanpools, is an economically and environmentally sound alternative to transportation by individual automobiles. Within San Francisco, travel by

## **PAGE 3.**

public transit, by bicycle and on foot must be an attractive alternative to travel by private automobile.

3. Decisions regarding the use of limited public street and sidewalk space shall encourage the use of public rights of way by pedestrians, bicyclists, and public transit, and shall strive to reduce traffic and improve public health and safety.
9. The ability of the City and County to reduce traffic congestion depends on the adequacy of regional public transportation. The City and County shall promote the use of regional mass transit and the continued development of an integrated, reliable, regional public transportation system.
10. The City and County shall encourage innovative solutions to meet public transportation needs wherever possible and where the provision of such service will not adversely affect the service provided by the Municipal Railway.

## **DESCRIPTION**

A variety of mobility services and technologies have emerged on San Francisco streets over the past few years, from mobile applications that connect passengers with on-demand mobility services, shared ride van services, shared scooter services, to automated vehicles that are currently being tested on City streets. These new mobility services present both opportunities and challenges to the safe and sustainable movement of people and goods on the transportation network. With the goals of providing for safe, reliable, sustainable, and equitable transportation choices, the SFMTA and SFCTA have collaborated to develop Guiding Principles for Emerging Mobility Services and Technologies. These Guiding Principles will provide a policy framework to assess the benefits and impacts of these new services and evaluate their ability to meet citywide goals.

Currently, SFMTA gets approached by various transportation, technology, and other companies wishing to use city street space, yet there is no consistent policy guidelines for how to engage with them. The Guiding Principles will provide a much needed tool for staff to engage with new transportation providers, and will help guide these services into alignment with city policies while minimizing the potentially detrimental impacts on the city's transportation network. It will also provide transparency for all stakeholders.

### ***Agency Coordination***

The SFMTA has drafted the Guiding Principles in conjunction with the SFCTA and the sister agencies are working in close coordination to better understand the impacts of these new services and technologies. Additionally, the SFMTA and SFCTA have developed the Emerging Mobility Services and Technologies Steering Committee to serve as a clearinghouse where topics related to these new transportation providers can be discussed and coordinated. The partnership between SFMTA and SFCTA is beneficial to both agencies' efforts and future collaborative endeavors working with emerging mobility services and technologies.

### ***Future Efforts***

Pending Board approval of the Guiding Principles, staff will develop metrics to assess

## **PAGE 4.**

compliance on balance with the Principles. Additionally, SFMTA's Office of Innovation will use the Guiding Principles as a basis the draft Emerging Mobility Strategy, an in-depth strategy document that will provide further guidance for staff to engage and assess the impact of new transportation services on the transportation network.

The Guiding Principles are also intended to shape SFMTA and SFCTA's delivery of the Federal Advanced Transportation and Congestion Management Technologies Deployment (ATCMTD) grant, which includes six pilots focused on smart carpool near Bay Bridge on- and off-ramps; smart signals centered on safety and congestion and Treasure Island mobility. The Treasure Island pilots include electronic tolling and an automated shuttle system.

## **STAKEHOLDER ENGAGEMENT**

The stakeholder engagement for the Guiding Principles for Emerging Mobility Services and Technologies has been comprehensive, soliciting input from City agencies/departments, private sector stakeholders and advocacy groups. The intention of the outreach effort was to 1) inform stakeholders and partner agencies about the purpose, development process and intended use of the Guiding Principles; and 2) consult with stakeholders to ensure the Guiding Principles address stakeholder and partner agencies' concerns and goals.

The outreach effort included informational presentations, focus groups, Board briefings stakeholder interviews, email correspondence and stand-alone meetings to gather feedback from key stakeholders. SFMTA and SFCTA staff conducted four focus groups, inviting over twenty advocacy groups representing transportation safety, equity, and accessibility issues in San Francisco. Staff also attended standing committee and working group meetings representing partner agencies and organized stakeholder interviews with 14 emerging mobility service and technology companies. Below is a summary of the outreach efforts:

### **Informational Presentations:**

Feb 07, 2017	SFMTA Board Special Meeting
Feb 17, 2017	SFMTA Policy and Governance Committee
May 24, 2017	SFCTA CAC
Jun 14, 2017	SFMTA Taxi Task Force
Jun 15, 2017	SFMTA Multimodal Accessibility Advisory Committee (MAAC)
Jun 13, 2017	Transportation Authority Board-Informational
Jun 21, 2017	Director's Working Group
Jun 27, 2017	Transportation Authority Board-Action
Jul 06, 2017	SFMTA CAC

### **Stakeholder Interviews:**

Apr 05, 2017	Motivate: Bikeshare service
Apr 06, 2017	Scoot: Scooter Sharing service
Apr 07, 2017	Waze Carpool: Ride Sharing service
Apr 10, 2017	Ford Smart Mobility: Personal Mobility service

**PAGE 5.**

Apr 12, 2017 Maven: Carshare service  
Apr 13, 2017 Scoop: Ridesharing service  
Apr 20, 2017 Zagster: Bikeshare service  
Apr 21, 2017 Easymile: Autonomous Vehicle Shuttle service  
Apr 26, 2017 GIG: Carshare service  
Apr 27, 2017 Chariot: Ridesourcing service  
May 05, 2017 Lyft: Transportation Network Company  
May 10, 2017 Social Bikes: Bikeshare service  
May 19, 2017 Uber: Transportation Network Company

**Focus Group Meetings:**

Jun 06, 2017 Transportation Safety Advocate Focus Group  
WalkSF, SF Bicycle Coalition, SF Transit Riders Union and Livable City

Jun 15, 2017 Equity Advocate Focus Group  
TransForm, Greenlining Institute, PolicyLink, Urban Habitat, Chinatown  
Community Development Center, People Organizing to Demand  
Environmental and Economic Justice (PODER), Impact Justice, Human  
Rights Commission, Alliance of Californians for Community  
Empowerment (ACCE)

Jun 20, 2017 Accessibility Advocate Focus Group  
Senior Disability Action, Independent Living Resource Center,  
Department of Aging and Adult Services, Mayor's Office on Disability,  
San Francisco In-Home Supportive Services (IHSS) Public Authority,  
Light House for the Blind and Visually Impaired

Jun 23, 2017 Shared Mobility Coordinator Meeting  
Metropolitan Transportation Commission (MTC), Bay Area Rapid Transit  
(BART), Oakland Department of Transportation (OakDOT), City of  
Berkeley, TransForm, Bike East Bay, Urban Habitat, Greenlining Institute

**Jun 08, 2017 Email Request for Comments:**

CPUC	San Francisco Fire
Caltrans	Vision Zero Task Force
MTC	Bay Area Council
BART	San Francisco Council of District Merchants
AC Transit	Chamber of Commerce
SFO	Community Business Districts
Caltrain	TWU Union
SamTrans	Muni Operators
Golden Gate Transit	PCO union
San Francisco Police Department	SF.citi

### *Community Feedback and Revised Guiding Principles*

After the completion of the outreach process, the SFMTA and SFCTA revised the proposed Guiding Principles for Emerging Mobility Services and Technologies based on stakeholder feedback. Advocacy groups and private sector stakeholder presented new and alternative perception of these services and technologies based on their engagement with these services. City agencies and departments supported and agreed with the goals of each Guiding Principle. Below is a summary of the revisions based on stakeholder feedback.

- **‘Safety’ and modal conflicts.** Stakeholders requested the Guiding Principles be extended beyond Vision Zero Policy goal of zero fatalities to include the reduction of modal conflicts that may occur at crosswalks, bike lanes, and at curbs when evaluating safety in the public right of way.
- **Clarify and strengthen ‘Sustainability.’** Both the private sector stakeholders and advocacy groups encouraged staff to more explicitly promote sustainability to include the use of non-auto modes and high-occupancy vehicles.
- **Expand ‘Disabled Access.’** Participants in the accessibility focus group emphasized the need to consider beyond accessible vehicles and include the software application, physical access, and overall services when evaluating the emerging mobility services and technologies.
- **Commitment to ‘Labor.’** Equity advocates and several other stakeholders identified job training and diversity of business ownership as additional goals the city should promote. ‘Consumers’ was removed from this principle’s title because consumer issues were strengthened in several other principles, like safety, equitable access, and accessible access.
- **Define Collaboration.** Throughout the entire outreach process, stakeholders highlighted the need to recognize the providers’ innovative role and the opportunity to collaborate with ultimate goal of meeting citywide goals.
- **Promote ideals.** Private stakeholders and several others discouraged describing negative outcomes to be avoided and promoted an alternative tone emphasizing positive ideals for each principle. In response, the Guiding Principles were rephrased in a more positive form.

### **ALTERNATIVES CONSIDERED**

For over five years, a number of emerging mobility companies have been operating in San Francisco and the SFMTA has recognized their impact on the city’s transportation network. While there has been general articulation of concerns regarding emerging mobility services and technologies from a staff level, the lack of a Board-approved, overarching policy framework has been identified as a fundamental gap when engaging with new service providers who wish to use city public rights of way to conduct business. The alternative to the Board-approved policy framework is a decentralized staff response, which is not considered adequate or strategic for services that may have a significant impact on the transportation network.

**PAGE 7.**

**FUNDING IMPACT**

If approved, this calendar item has no fiscal impact as a policy framework.

**ENVIRONMENTAL REVIEW**

On June 22, 2017, the SFMTA, under authority delegated by the Planning Department, determined that approval of the Guiding Principles for Emerging Mobility Services and Technologies is not a “project” under the California Environmental Quality Act (CEQA) pursuant to Title 14 of the California Code of Regulations Sections 15060(c) and 15378(b).

A copy of the CEQA determination is on file with the Secretary to the SFMTA Board of Directors and is incorporated herein by reference.

**OTHER APPROVALS RECEIVED OR STILL REQUIRED**

The City Attorney’s Office has reviewed this calendar item. The SFCTA Commission approved these principles at its July 11, 2017 meeting.

**RECOMMENDATION**

SFMTA staff recommends that the Board of Directors approve the Guiding Principles for Emerging Mobility Services and Technologies that will serve as a goals-based policy framework for assessing the benefits and impacts of these services and technologies, evaluating their ability to meet citywide goals, and providing guidance with respect to meeting these goals.

SAN FRANCISCO  
MUNICIPAL TRANSPORTATION AGENCY  
BOARD OF DIRECTORS

RESOLUTION No. \_\_\_\_\_

WHEREAS, A variety of mobility services and technologies have emerged, from mobile applications that connect passengers with on-demand service, shared ride van services, shared scooter services, to automated vehicles that are currently being tested on San Francisco streets; and,

WHEREAS, These new mobility services present both opportunities and challenges to the safe and sustainable movement of people and goods in the transportation network; and,

WHEREAS, Some of these services operate in regulatory margins and their impacts on the transportation system have gone unmeasured; and,

WHEREAS, With the goals of providing for safe, reliable, sustainable and equitable transportation choices now and in the future, SFMTA and SFCTA have collaborated to develop the Guiding Principles for the management of Emerging Mobility Services and Technologies; now, therefore be it,

RESOLVED, That the San Francisco Municipal Transportation Agency Board of Directors approve the Guiding Principles for Emerging Mobility Services and Technologies to serve as a goals-based policy framework for assessing the benefits and impacts of these services and technologies and evaluating their ability to meet citywide goals; and, be it further

RESOLVED, The Guiding Principles will serve as a policy framework for these services and technologies to ensure access to affordable, equitable and sustainable mode choices, consistent with the City's Transit First Policy and the SFMTA Strategic Plan goals; and, be it further

RESOLVED, The Guiding Principles will allow for the consistent application of policies and programs in order to verify these services and technologies comply with city policies, while promoting their benefits and minimizing their potentially detrimental impacts on the city's transportation network.

I certify that the foregoing resolution was adopted by the San Francisco Municipal Transportation Agency Board of Directors at its meeting of July 18, 2017.

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Secretary to the Board of Directors  
San Francisco Municipal Transportation Agency



**Enclosure 2**

**Guiding Principles for  
Management of Emerging Mobility Services and Technologies**

Safety	Emerging Mobility Services and Technologies must be consistent with the City and County of San Francisco’s goal for achieving Vision Zero, reducing conflicts, and ensuring public safety and security on roads, sidewalks and public rights of way.
Transit	Emerging Mobility Services and Technologies must support and account for, rather than compete with public transit and encourage use of high-occupancy modes.
Equitable Access	Emerging Mobility Services and Technologies must promote equitable access to services. All people, regardless of age, race, color, gender, sexual orientation and gender identity, national origin, religion, or any other protected category, should benefit from Emerging Mobility Services and Technologies, and groups who have historically lacked access to mobility benefits must be prioritized and should benefit most.
Disabled Access	Emerging Mobility Services and Technologies must be inclusive of persons with disabilities. Those who require accessible vehicles, physical access points, services, and technologies are entitled to receive the same or comparable level of access as persons without disabilities.
Sustainability	Emerging Mobility Services and Technologies must support sustainability, including helping to meet the city’s greenhouse gas (GHG) emissions reduction goals, promote use of all non-auto modes, and support efforts to increase the resiliency of the transportation system.
Congestion	Emerging Mobility Services and Technologies must consider the effects on traffic congestion on roads, sidewalks and public rights of way, including the resulting impacts on road safety, modal choices, emergency vehicle response time, transit performance and reliability.
Accountability	Emerging Mobility Services and Technologies providers must share relevant data so that the City and the public can effectively evaluate the services’ benefits to and impacts on the transportation system and determine whether the services reflect the goals of San Francisco.
Labor	Emerging Mobility Services and Technologies must ensure fairness in pay and labor policies and practices. Emerging Mobility Services and Technologies should support San Francisco’s local hire principles, promote equitable job training opportunities, and maximize procurement of goods and services from disadvantaged business enterprises.
Financial Impact	Emerging Mobility Services and Technologies must promote a positive financial impact on the City’s infrastructure investments and delivery of publicly-provided transportation services.
Collaboration	Emerging Mobility Services and Technology providers and the City must engage and collaborate with each other and the community to improve the city and its transportation

**PAGE 10.**

system.

**Use of Guiding Principles:** The SFCTA and SFMTA will use these Guiding Principles to shape our approach to Emerging Mobility Services and Technologies. For the SFMTA, these Guiding Principles will serve as a framework for the consistent application of policies and programs. The SFCTA will use these Guiding Principles to evaluate these services and technologies; identify ways to meet city goals, and shape future areas of studies, policies and programs. Every Guiding Principle may not be relevant to every consideration associated with Emerging Mobility Services and Technologies, and in some cases a service may not meet all of the principles consistently. SFMTA and SFCTA Directors and staff will consider whether a service or technology is consistent with the Guiding Principles, on balance. If a service provider or technology does not support these Guiding Principles, SFMTA and SFCTA will work with the service provider to meet the principles, or may choose to limit their access to City resources.