



London Breed, Mayor

Amanda Eaken, Chair
Stephanie Cajina, Director
Steve Heminger, Director

Fiona Hinze, Director
Manny Yekutiel, Director

Jeffrey Tumlin, Director of Transportation

MEMORANDUM

TO: Members of the SFMTA Board of Directors

FROM: Viktoriya Wise, SFMTA Chief of Staff

DATE: May 2, 2023

SUBJECT: 2023 Board Workshop Summary Report

The San Francisco Municipal Transportation Agency (SFMTA) Board of Directors' Annual Workshop was convened on February 7, 2023 to provide a space for discussion between the Board, staff and the public regarding the agency's budget, building trust with the communities and the SFMTA Board's priorities for the coming year. Rather than a lengthy series of presentations, the day was focused on two agenda items and gave SFMTA staff the opportunity to participate in a project fair to showcase their work across three categories: customer experience, employee experience and innovation. The workshop was held in a hybrid format with attendees both in person and joining remotely via WebEx. It was open to the public, broadcast live online, and there were two opportunities for public comment.

The enclosed report includes key takeaways from the day, including highlights from the financial overview section of the meeting and themes that emerged from the Board of Directors' dialogue with the panel of community leaders, staff and the public. Most importantly, it sets forth the next steps and action items that will guide the work of the Board for the next year.

Enclosure: Board Workshop Summary Report



2023 Board Workshop Summary Report



*Overview of the annual board workshop
held February 7, 2023*



SFMTA

Annual Board Workshop Summary Report

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OVERVIEW OF PRESENTATIONS

The first half of the workshop included an introduction by the Director of Transportation Jeff Tumlin connecting the agency’s work to the city’s goals and recovery plan; an overview of city financial projections by City Controller Ben Rosenfield; and a presentation on the agency’s financial outlook by SFMTA Chief Financial Officer Bree Mawhorter and Chief Strategy Officer Jonathan Rewers. The second half of the workshop was centered on a panel of community leaders discussing insights into how to build trust between San Francisco communities and the SFMTA.

Workshop Introduction: Navigating the New San Francisco

In his [introductory presentation](#) for the workshop, Director Tumlin started with a brief overview of the major agency accomplishments since the 2022 Board Workshop and then outlined the agency’s challenges and priorities for 2023. The agency has delivered critical programs, great service, and major infrastructure projects. But we still face significant challenges related to financial stability, the customer and employee experience, equity, street safety, transit security and changing travel needs. He underscored the critical role the SFMTA plays in supporting a healthy, vibrant San Francisco and committed the agency to building trust with communities, fostering innovation and working collaboratively to serve the city as it reinvents itself yet again. The agency priorities that Director Tumlin introduced

in this first segment of the workshop were critical inputs in the later discussions on the SFMTA’s financial outlook and were also included in the Mayor’s State of the City address delivered two days later, highlighting the agency’s coordination with citywide priorities and collaboration with other city departments.

City Financial Projections and Context from the Controller’s Office

As [presented](#) by City Controller Ben Rosenfield, San Francisco is grappling with myriad economic challenges stemming from the pandemic. Those challenges include rising office vacancies, sluggish Downtown commerce, including hospitality, sluggish housing prices compounded by city population loss, loss of local tax revenues, high COVID-19 response expenses and inflationary pressures driving up costs. The city faces questions about how to revive Downtown and how transportation supports that revival.

The Controller also presented data that there is economic loss in every zip code, not just Downtown. There will be a prolonged economic recovery for the entire city, the full shape of which is not yet known. The city faces persistent and long-lasting weakness in key revenues, thereby creating the need to act consistently over time, monitor the recovery and adjust approaches. However, the city is better prepared for the current financial downturn than when faced with



the Great Recession in 2007 in that there are more reserves and there has been multi-year planning to prepare for downturns.

SFMTA's Financial Outlook

SFMTA Chief Financial Officer Bree Mawhorter and Chief Strategy Officer Jonathan Rewers then gave [presentations](#) about the agency's financial outlook. CFO Mawhorter presented data showing that during the pandemic, transit fare and parking revenues were decimated, free and discounted transportation services were expanded and supporting general fund revenue declined. However, the agency received critical federal relief funds, prudently restored service and slowed hiring, the combination of which kept the agency afloat and created a two-year fiscal runway that ends in Fiscal Year 2025. It is also notable that salary under-expenditure created significant short-term relief in FY22-23, but long-term solutions are needed since hiring challenges impede service delivery, and service delivery is key to building and maintaining trust with the public.

The five-year forecast includes a large and growing deficit beginning in Fiscal Year 2025, when federal funds run out and expenditures grow faster than the relatively flat revenues. Based on current travel patterns, the agency expects transit revenue to continue to be below pre-pandemic levels. In the five-year horizon, the agency also expects lower general fund transfers, more spending due to inflation and higher salary and fringe costs due to increased hiring and inflationary pressures. The agency's greatest long-term need is to get to a balanced budget by FY 2025 while hiring back to the natural rate of attrition to provide quality service. To do this, it is imperative to generate new revenue. When faced with a budget shortfall during the Great Recession, the agency cut back on maintenance, which is not recommended now, as it will cost the agency more in the long run.

Building Trust with the City's Communities

The SFMTA's Chief of Staff, Viktoriya Wise, opened the afternoon discussion with a panel on [Building Trust with the City's Communities](#). In her opening remarks, Chief of Staff Wise acknowledged both a trend in loss of faith in the institution of government and that historical racial discrimination by government agencies, including the SFMTA, has contributed to an environment of distrust.

This panel was only the first conversation in the agency's endeavor to build trust with San Francisco communities, and SFMTA acknowledges that it has a lot of progress to make. Most members of the panel were familiar with some of the challenging projects that generated mistrust (e.g., the Central Subway, wherein Chinatown and the neighborhood's merchants had to endure many challenges



The Mayor's State of the City Address

As Mayor London Breed made clear in her [State of the City address on February 9, 2023](#), the city must focus on delivering high-quality basic services with consistency. In addition to highlighting the need to support children and families and tackle climate change, she also emphasized the importance of providing world-class transportation and an adequate housing supply for our workforce to enable economic recovery. Mayor Breed stressed the need to support the recovery of Downtown San Francisco by ensuring public safety, access and economic opportunity. While San Francisco faces unprecedented challenges, there are also enormous opportunities for progress, and the city has proved itself resilient in the past. Mayor Breed also expressed the importance of centering people and their experiences as the heart of San Francisco during this period of recovery. This very same theme, a culture of caring, also surfaced during the Board Workshop discussions.

Downtown's Recovery Plan

Mayor Breed has mapped out a vision for the future of Downtown in the wake of the COVID-19 pandemic as the way people work and businesses operate have shifted. Her vision, the [Roadmap to Downtown San Francisco's Future](#), defines five key areas, and transportation plays a key role in supporting this recovery. In her vision, Downtown San Francisco will be a dynamic destination with a world-class transportation experience. This means it is easy and convenient to get there; travel is efficient and sustainable; walking and cycling are safe and easy; transit is frequent, fast, clean, reliable and easy to navigate; stations, terminals, sidewalks and gateways are clean, safe and incorporate art and showcase the best of the city; and Downtown is the center of the city's and region's transit network through ongoing investments that deepen connectivity. The SFMTA shares these aims, which were touched upon in both the financial outlook and the building trust portions of the workshop, as the Board discussed agency priorities and funding strategies to support the city.

and delays). Chief of Staff Wise expressed that for the SFMTA to achieve its goal of being at the forefront of rebuilding people's trust in government, the agency must examine what the agency's practices are when making decisions and prioritizing projects, programs and funding and center racial equity in those decisions. We must ask ourselves how we engage with communities of color who are not in constant communication with our agency. Ultimately, relationship and trust building can move us towards achieving our racial equity goals. The panel's participants were leaders from a wide range of organizations in San Francisco (*Appendix 2: Trust Panel Participants*).

As panelist Tacing Parker, Senior Executive Director with the Bayview Hunters Point YMCA, offered, trust is unique, looks different for different communities and can be surface-level or can be deep. A key step is to recognize with whom we need to build trust. Community is not just based on geography, it spans a variety of identities and experiences, including those who have experienced racism, who face risk given their place on the gender or identity spectrum, and more specifically Trans and LGBTQ+, those with disabilities or other vulnerabilities, including people who are unhoused. The discussion centered on the necessity of establishing respect in order to build trust and the fact that building trust starts on the ground between people. At the SFMTA, this can be put into action by staff hearing what community members think, learning from what they know and experience so that challenges can be defined and then building solutions together. SFMTA Vice Chair Borden aptly noted that it does not work when the SFMTA alone defines the problem and the solution.

Three major themes emerged from the panel discussion with the Board: 1) serving with care, 2) decision-making and power sharing and 3) transparency.

Serving with Care

Ms. Parker remarked that it is imperative for the agency to serve the public with care, ensuring that people are seen, valued and feel cared for by the SFMTA. What came out of the discussion was a call to create a culture of caring by building relationships through:

- establishing the SFMTA's presence in community spaces without an agenda;
- providing reliable and accessible service and clean transit shelters and stations;
- creating safety on transit and on our streets (Vision Zero);
- communicating with the public about decision making; and
- directly engaging people who are affected by our decisions.

Panelist Kevin Ortiz, Chair of the SFCTA Community Advisory Committee and Co-Founder of Misión Destino, suggested that this shift asks the agency to prioritize the people taking transit who are most vulnerable, such as seniors, people with disabilities and single mothers working non-traditional

hours. This resonated with Chair Eaken, who asked how to create a culture of caring that extends to both the public and the SFMTA workforce. The agency's internal culture shapes how staff feel and work together as well as how staff work with communities. To this point, relationships need to be built both inwards and outwards. As Ms. Parker said, people need to feel cared about in the city that they love.

Sharing Power and Decision-making

Decision-making and power sharing came up as a key theme in terms of who makes decisions: the public, the agency and both in collaboration. Panel members agreed that the SFMTA should be able to make difficult decisions and referred to the recent success of the agency's POETS program and contributions from staff like Lulu Feliciano. However, they also stressed that there must be involvement from people being affected by decision making and communication with public about the agency's decision-making rationale. There is power in making decisions and there was recognition that power can and should be shared. Panelist Malcolm Yeung, Executive Director of Chinatown Community Development Center (CCDC), emphasized that trust needs tending and attention, as it can come and go, and trust between individuals is different from trust between individuals and an organization. For example, individual staff may leave the agency or project, but the community remains and remembers. Also, Mr. Yeung emphasized that trust also requires the agency to share power, which can be hard for an organization that is so heavily responsible for delivering systems every day under stressful circumstances. However, being honest about those realities and challenges can lead to trust and understanding. Building trust looks different in different communities.

One outstanding question is how trust can be a key performance metric and how we can track the agency's progress in building trust. Another is how equity can be embedded in the decision-making process. How can different community members express their perspectives when not everyone has the access, time and familiarity with the process to engage in the process or even voice an opinion.

Fostering Transparency

Finally, transparency was a universal interest of the panelists, specifically transparent communication with the public about decision-making as well as about construction and planned projects. The panelists appreciated the honesty the Board showed when directors spoke about the agency's challenges in delivering service and projects. The panelists, as well as members of the public in attendance, also expressed an interest in data transparency – making it available to the public, using data in decision-making and supplementing quantitative data with qualitative data.

SFMTA Project Fair

After the discussions on the agency’s financial outlook, the Board of Directors recessed the workshop for lunch. During this two-hour break, the Board of Directors, agency staff and members of the public were able to view a variety of posters and demonstrations on the customer and employee experience, as well as agency innovations. All attendees were able to meet agency staff and understand the details of their work, allowing for a unique opportunity to learn about key agency functions.

Each station at the Project Fair is listed to the right, and the posters are available online: [Appendix 3: Project Fair Posters](#). Additional photos of the workshop are also available online: [Appendix 4: Photos of the Board Workshop](#).

Customer Experience

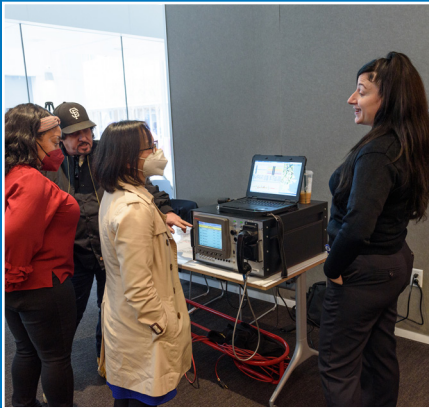
- Muni Forward
- Bus Fleet Management
- Bus-in-a-box
- Service Equity Expansion
- Brake board
- Switch Machine
- Subway Renewal
- Light Rail Fleet Expansion & Replacement
- Mobile Fare Van

Employee Experience

- Transit Operations Recognition & Accountability
- Ombuds Office
- PaCT Program
- Road to Wellness Program
- Gratitude Wall

Innovation

- Soft Hit Posts & Rubber Curbs
- Traffic Signal Box
- Climate Change Roadmap
- Electric Bus



KEY TAKEAWAYS

The SFMTA Board of Directors was clear in its direction to the agency. Much like the Mayor, the Board is eager to focus on people we serve. The Board understands that while we are in a potentially catastrophic financial situation, the agency must still serve those in greatest need. While there are no silver bullets to solve our financial challenges, we have the opportunity to explore a kaleidoscope of solutions, and the chance to provide clear communication with the public around those solutions. We must clearly communicate about why we are making the choices we do.

During the Board's discussion of the financial overview and building trust, the following key themes emerged:



Pursue options to generate potential revenue: create new sources of revenue while supporting and maintaining crucial service for those most in need.

- Implement parking hour changes approved three years ago.
- Resume indexing fares but provide free or reduced fare for people that need it and revisit the Clipper subsidy.



Focus on the customer experience:

- Ensure all parts of system are clean, attractive and safe by increasing transit vehicle and shelter cleaning/repair and by exploring solutions to make customers feel safe throughout the systems, be it on vehicles or in stations, shelters or streets.
- Focus on how the customer accesses the system and gets information about services; make it easy, simple and invisible to pay the fare, enabling options like payment by credit card, etc.



Right-size agency services:

- Do less but do it well.
- Be responsive to changes in travel patterns.



Hire the positions needed to provide high quality service, which then engenders trust.



Create a culture of caring:

- Establish the building blocks for trust as identified by the Board and panelists.
 - Transparency in decision-making
 - Strong, frequent, and culturally appropriate communication
 - Collect and share data, making it visible who is being served
- Continually work to maintain trust amongst and between city communities and staff.

NEXT STEPS & ACTION ITEMS

The following action items were specifically requested by the Board Members during the workshop or have been identified by the SFMTA Executive Team in response to the discussions. Since the agency has been actively thinking about how to improve our relationship with San Francisco communities, some of the actions are already among the strategic initiatives that were developed to implement SFMTA Strategic Plan ([Appendix 5: SFMTA Strategic Plan](#)). These initiatives are critical projects and programs that staff are committed to working

on in the next year and beyond to advance the Strategic Plan goals. Other follow-ups listed below will be implemented as part of the agency's commitment to its values, and the metrics associated with them will be reported on as part of the Strategic Plan. Even if not already part of an initiative or metric, the agency is committed to implementing these follow-up actions and will be reporting back to the Board on our progress.

Follow-ups from the financial outlook discussions

FOLLOW-UP ACTION		STRATEGIC PLAN VALUES & GOALS	EXISTING INITIATIVES & METRICS	CONTACT
1	Update the Board on hiring	Goal 3. Recruit, hire and invest in a diverse workforce.	Develop and implement an active recruitment strategy.	Kim Ackerman
2	Provide regular updates on the legislative program: <ul style="list-style-type: none"> • A mid-year legislative program report back to give an update on advocacy and where we stand on priorities. • Present the legislative program as an informational item at the Board before taking action at a 2nd meeting. 	Goal 7. Build stronger relationships with stakeholders.	Secure and retain state transportation funding. Secure federal transportation funding.	Kate Breen
3	Update on Community Survey Data	Value of Trust	Customer rating: Overall customer satisfaction with Muni. Customer rating: Trust in the SFMTA.	Jonathan Rewers
4	Deliver an informational presentation on autonomous vehicles - what is the agency worried/excited about and what is SFMTA's role?	Goal 5: Deliver reliable and equitable transportation services.	Develop the AV Local Operational Deployment Agenda (ALODA).	Julia Friedlander, Viktoriya Wise

FOLLOW-UP ACTION		STRATEGIC PLAN VALUES & GOALS	EXISTING INITIATIVES & METRICS	CONTACT
5	Conduct a traffic study of Slow Page Street to see how it is progressing. Have Slow Streets team do detailed evaluation for program, focusing on key metrics related to speed and traffic volumes.	Goal 4. Make streets safer for everyone.	Develop and implement an Active Transportation Network.	Tom Maguire
6	Evaluate options for customers to pay fares with a credit cards	Goal 10. Position the agency for financial success.	-	Bree Mawhorter
7	Research innovative fare enforcement policies, processes, and practices	Goal 10. Position the agency for financial success.	-	Jonathan Rewers
8	Conduct informal workshopping and coalition building early in the budget process to fully understand the issues and needs when making changes to fare pricing.	Goal 7: Build stronger relationships with stakeholders.	Foster deeper engagement with communities through the POETS process.	Bree Mawhorter

Follow-ups from the panel discussion on building trust with the city's communities

FOLLOW-UP ACTION		STRATEGIC PLAN VALUES & GOALS	EXISTING INITIATIVES & METRICS	CONTACT
9	Be proactive and transparent in communications: <i>Expand engagement with small business communities through regular attendance at merchant organizations' meetings</i>	Goal 7. Build stronger relationships with stakeholders.	Foster deeper engagement with communities through the POETS process.	Deanna Desedas
10	Be proactive and transparent in communications: <i>Implement community liaison program</i>	Goal 7. Build stronger relationships with stakeholders.	Foster deeper engagement with communities through the POETS process.	Deanna Desedas
11	Be proactive and transparent in communications: <i>Leverage data and customer insights collected during the Language Assistance Plan and Public Participation Plan process to inform agency communications and strengthen feedback loop</i>	Goal 7. Build stronger relationships with stakeholders.	Foster deeper engagement with communities through the POETS process.	Deanna Desedas
12	Be proactive and transparent in communications: <i>Do additional POETS training for staff for IAP2 and reinstate public outreach and engagement requirements and plan</i>	Goal 7. Build stronger relationships with stakeholders.	Foster deeper engagement with communities through the POETS process.	Deanna Desedas
13	As part of the Transportation Element, document community histories and past harms caused by transportation policies and projects.	Values of Equity and Inclusivity	While not a current Strategic Initiative, the community histories will be included in the next Transportation Element.	Tom Maguire; Maia Small
14	Establish a Vision Zero task force and/or Vision Zero subcommittee of the Board	Goal 4. Make streets safer for everyone.	Deliver Vision Zero Action Strategy Commitments	Tom Maguire
15	Continue to include the Accessible Services team early in the project planning process	Goal 1. Identify and reduce disproportionate outcomes and resolve past harm towards marginalized communities.	-	Tom Maguire, Julie Kirschbaum, Kate Toran, Annette Williams

FOLLOW-UP ACTION		STRATEGIC PLAN VALUES & GOALS	EXISTING INITIATIVES & METRICS	CONTACT
16	Develop REAP Phase 2 for consistent guidance rooted in equity; investigate options for engagement, prioritization and shared decision-making	Goal 1. Identify and reduce disproportionate outcomes and resolve past harm towards marginalized communities.	Develop and implement Phase Two Racial Equity Action Plan (REAP).	Josephine Ayankoya
17	Work with the SFMTA Citizen Advisory Council to better understand their views and suggestions on building trust.	Goal 7. Build stronger relationships with stakeholders.	-	Viktoriya Wise
18	Active communities planning – structure process centered on deep engagement with communities to identify needed active infrastructure to build out the network	Goal 4. Make streets safer for everyone.	Develop and implement an Active Transportation Network.	Tom Maguire; Maia Small
19	Implement Community Connections Program, which involves simply participating in community events.	Goal 1. Identify and reduce disproportionate outcomes and resolve past harm towards marginalized communities.	-	Josephine Ayankoya; Tracey Lin
20	Muni Vision – implement deep public outreach to define what the future of transit service will look like if SFMTA got additional resources.	Goal 5. Deliver reliable and equitable transportation services.	-	Julie Kirschbaum; Sean Kennedy
21	Institute regular informal briefing meetings with BOS that focus specifically on transit service updates	Goal 5. Deliver reliable and equitable transportation services.	-	Julie Kirschbaum; Sean Kennedy

APPENDICES

[Appendix 1: Workshop Agenda](#)

Appendix 2: Trust Panel Participants

Moderator – Melissa Culross, SFMTA

1. Albert Chow
President, People of Parkside Sunset (POPS)
2. Milan Duong-Gordley
SFMTA Youth Transportation Advisory Board (YTAB) Member
3. Preston Kilgore
SF Board of Supervisors, District 5 Aide
4. Jessica Lehman
Executive Director, Senior and Disability Action
5. Eleazar Martinez
Program Director of Family Connections Centers
6. Kevin Ortiz
Chair of the SFCTA Community Advisory Committee and Co-Founder of Misión Destino
7. Tacing Parker
Senior Executive Director, Bayview Hunters Point YMCA
8. Masood Samereie
President of San Francisco Council of District Merchants Associations
9. Sebastián Vera Cuevas
SFMTA Youth Transportation Advisory Board (YTAB) Member
10. Malcolm Yeung
Executive Director of Chinatown Community Development Center

[Appendix 3: Project Fair Posters](#)

[Appendix 4: Photos of the Board Workshop](#)

[Appendix 5: SFMTA Strategic Plan](#)

SFMTA Board of Directors
sfmta.com/sfmta-board-directors