

San Francisco Municipal Transportation Agency

MTA

Municipal Transportation Agency

2008-2012 Strategic Plan

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2008-2012 Strategic Plan

Table of Contents

Executive Summary	2
Introduction	6
Mission	7
The Future Environment: 2012 - Key Assumptions	8
Strategic Priorities	9
Vision Statement	10
Strategy Goals, Objectives, & Key Performance Indicators	11
Goal 1: Improved Safety, Cleanliness, Sustainability	11
Goal 2: Improved Service Delivery	12
Goal 3: Improved Communication	13
Goal 4: Improved Financial Stability	14
Goal 5: Improved Work Environment and Workforce	15
Goal 6: Improved Information Technology	17
Conclusion	18

Municipal Transportation Agency 2012 Organization Strategic Plan Executive Summary

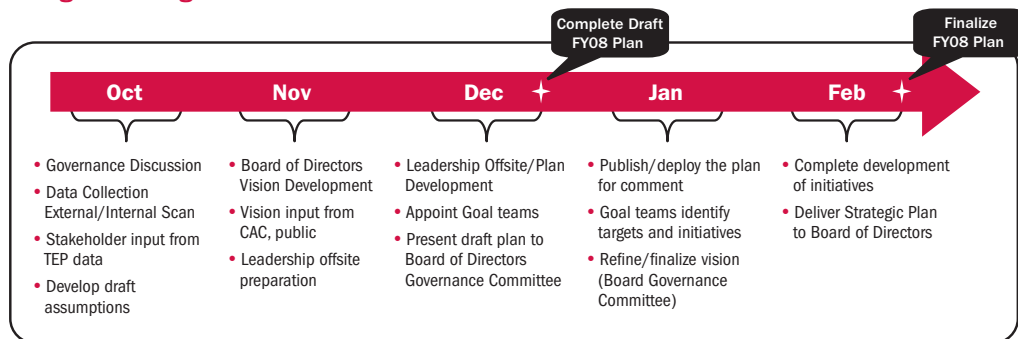
Background

The Municipal Transportation Agency (MTA) embarked on a five-month effort aimed at developing a comprehensive strategic plan that identifies both what the Agency must look like if it is to be successful in the future, and what actions it must take to get there. We began by conducting a comprehensive analysis of the future environment the SFMTA will face in 2012. As a result of the analysis, key assumptions were made as to how these issues will impact the Agency. Based on these assumptions, the SFMTA Board of Directors identified strategic priorities for the Agency that must be addressed if it is to perform its mission and service its customers and stakeholders successfully in the future. To articulate what success looks like, the Board of Directors crafted a Vision statement that will be the focus of our improvement efforts as we move forward.

key performance indicators (KPIs) and propose initiatives the Agency will implement to achieve the identified objectives.

The six goal teams were comprised of cross section of staff from different levels and divisions within the agency. The make up of the goal team was determined by the scope of the objectives that were identified. Goal Team 1 and 2 were combined to focus in specific service delivery improvements. This team was comprised of members from Operations, Transportation Planning and Development, including the Transit Effectiveness Project (TEP), and the Department of Parking and Traffic (DPT). Goal Team 3 focused on the SFMTA's interface with customers, as well as external stakeholders such as other regional transit providers. The team was informed by

MTA Strategic Planning Timeline



With the vision complete, the SFMTA Senior Leadership team began the process of developing a broad-based strategy for how the Agency will achieve the vision. The team identified six overarching goals and an initial set of objectives that would serve as the core of this strategy. The Senior Leadership team then appointed goal teams to refine the objectives, identify

staff from External Affairs. Goal Team 4 was tasked with examining the projected financial state of the agency over the next five years to determine how the SFMTA could increase revenue and reduce costs. The team was comprised of Finance and Administration and DPT staff. Goal Team 5 focused on workforce related objectives and was comprised of

Human Resource and Transportation Planning and Development personnel. Goal Team 6 was comprised of staff from Information Technology and focused on data integration and leveraging technological innovations throughout all aspects of the Agency. As a result of this combined effort, SFMTA embarked on a new direction to cross-pollinate ideas from different sectors within the agency to engender a greater understanding of how all components of the agency can work better together to improve service to our customers. The result is the 2012 Strategic Plan, a dynamic document to be used as a guidepost of the agency while maintaining a fluid relationship with the changing environment of public transportation within the City and County of San Francisco.

Our Vision

“Providing timely, convenient, safe and environmentally friendly transportation alternatives...SFMTA enhances the quality of life of San Francisco”

Our Strategy

The agency strategy utilizes the goals and objectives to determine how the overall vision will be achieved. Each goal was crafted with the overall vision in mind and each objective indicates an area of emphasis within each goal that will ensure the agency is aligned with each of its strategic priorities.

Goal 1: Customer Focus

To provide safe, accessible, clean, environmentally sustainable service and encourage the use of auto-alternative modes through the Transit First Policy

Objectives:

- 1.1 Improve safety and security across all modes of transportation
- 1.2 Improve cleanliness of SFMTA stations and vehicles by providing a clean, comfortable experience
- 1.3 Reduce emissions as required by SFMTA Clean Air Plan
- 1.4 Improve accessibility across transit service
- 1.5 Increase percentage of trips using more sustainable modes (such as transit, walking, bicycling, rideshare)

Goal 2: Customer Focus

To get customers where they want to go, when they want to be there

Objectives:

- 2.1 Improve transit reliability to meet 85% on-time performance standard¹
- 2.2 Ensure efficient transit connectivity and span of service²
- 2.3 Fulfill bicycle and pedestrian network connectivity
- 2.4 Reduce congestion through major corridors
- 2.5 Manage parking supply to align with SFMTA and community goals

Goal 3: External Affairs - Community Relations

To improve the customer experience, community value, and enhance the image of the SFMTA, as well as ensure SFMTA is a leader in the industry

Objectives:

- 3.1 Improve economic vitality by growing relationships with businesses, community, and stakeholder groups
- 3.2 Pursue internal and external customer satisfaction through proactive outreach and heightened communication conduits
- 3.3 Provide a working environment that fosters a high standard of performance, recognition for contributions, innovations, mutual respect and a healthy quality of life
- 3.4 Enhance proactive participation and cooperatively strive for improved regional transportation

Goal 4: Financial Capacity

To ensure financial stability and effective resource utilization

Objectives:

- 4.1 Increase revenue by 20% or more by 2012 by improving collections and identifying new sources
- 4.2 Ensure efficient and effective use of resources

Goal 5: MTA Workforce

To provide a flexible, supportive work environment and develop a workforce that takes pride and ownership of the agency's mission and vision and leads the agency into the evolving, technology-driven future

Objectives:

- 5.1 Increase resources available for employees in performing their jobs (tools, staff hours, etc)
- 5.2 Improve facilities in which people are working
- 5.3 Improve internal communication and employee satisfaction
- 5.4 Increase internship and apprentice opportunities to fill critical positions (Determine current and future critical needs and create opportunities)
- 5.5 Improve SFMTA's ability to grow and retain strong leadership (Succession Planning)
- 5.6 Improve the performance management process across all classifications (Increase the number of performance expectation discussions and employee assessments)
- 5.7 Develop Leadership and Management Training
- 5.8 Improve work/life balance of employees
- 5.9 Improve access to Human Resource System information
- 5.10 Improve access to knowledge capital across the SFMTA (HR Portal)

Goal 6: Information Technology

To improve service and efficiency, the SFMTA must leverage technology

Objectives:

- 6.1 Information and Technology Leadership: Identify, develop and deliver the new and enhanced systems and technologies required to support SFMTA's 2012 goals

San Francisco Municipal Transportation Agency 2012 Organization Strategic Plan

Introduction

The San Francisco Municipal Transportation Agency is comprised of the Municipal Railway (Muni) and the Department of Parking and Traffic. On November 2, 1999, the voters of San Francisco passed Proposition E, an amendment to the City Charter governing the Municipal Railway. The measure created a new, quasi-independent agency called the San Francisco Municipal Transportation Agency (SFMTA) to serve as the umbrella organization managing Muni and the Department of Parking and Traffic as one entity. Unlike most large public transit systems in the United States, SFMTA is not a completely independent agency or authority. SFMTA is a department within the City and County government of San Francisco, and thus reports to a variety of policy making bodies for different issues. Thus, the impetus for developing an organizational strategic plan was born out of the opportunity to develop a comprehensive plan that would encompass all aspects of the agency's areas of transportation oversight from transportation planning and development to public transit operations, to pedestrian and bicycle planning.

The Municipal Transportation Agency (MTA) embarked on a five-month effort aimed at developing a comprehensive strategic plan that identifies both what the Agency must look like if it is to be successful in the future, and what actions it must take to get there. We began by conducting a comprehensive analysis of the future environment the SFMTA will face in 2012. As a result of the analysis, key assumptions were made as to how these issues will impact the Agency. Based on these assumptions, the SFMTA Board of Directors identified strategic priorities for the Agency that must be addressed if it is to perform its mission and service its customers and stakeholders successfully in the future. To articulate what success looks like, the Board of Directors crafted the organizational vision and a mission statement that will be the focus of our improvement efforts as we move forward.

Our Mission

The San Francisco Municipal Transportation Agency (SFMTA), comprised of the Municipal Railway, Department of Parking and Traffic and the Parking Authority, is responsible for all modes of transportation within the City and County of San Francisco including public transit, bicycling, pedestrian planning and accessibility, and traffic and parking management

Why we exist...The MTA seeks to provide mobility for its customers as pedestrians, bicyclists, transit users, as well as for those who utilize our streets and roads via automobiles.

Who we serve...The MTA's customers include residents, visitors, and workers within the City and County of San Francisco.

San Francisco 2012: Our Future Environment Key Assumptions

An extensive analysis was conducted to consider the future environment in which the SFMTA will exist by 2012 to help identify opportunities and threats potentially facing the agency. During this review, a stakeholder analysis and vision developed by the Transit Effectiveness Project (TEP); future demographic data for the region; transportation industry trends; and business, political and socio-economic trends for the San Francisco region were reviewed. In addition, an internal analysis was conducted to review internal surveys, performance data, budgets, customer and employee surveys to help identify the strengths and weaknesses of the Agency. As a result of this analysis, assumptions about the future environment were developed and presented during the Board of Directors' visioning process:

- MTA will have the opportunity to serve more regional travelers either coming into the city or working outside the city
- Existing and new Bay Area residents will be more willing to try transit solutions in the future
- Improvements to traffic flow to ease congestion as well as a focus on pedestrian and bicycle safety will be needed
- An aging population will provide new challenges in service requirements and accessibility needs
- SFMTA will attract and retain riders if it provides safe, accessible, reliable and clean service
- We will maintain and increase favorable trends in customer perception
- SFMTA's ability to meet core and emerging customers' needs will reverse the trend of flat and/or declining ridership during periods of population growth
- Efficient planning of service delivery will enable SFMTA to provide flexible service to satisfy demand patterns
- The continued retention and expansion of existing revenue sources will enable SFMTA to improve its financial stability
- Improved efficiency and reduced cost will enable MTA to gain financial stability
- The image of SFMTA among the community and within current political circles will need to be enhanced and political relationships strengthened
- SFMTA will need to ensure that it continues to transition its fleet to zero emission vehicles, biodiesel, and incorporate other clean air or "green" improvements
- Improved economy and increased workforce competition leads to higher attrition, increased vacancy rates and diminished talent pool
- SFMTA needs to be an employer of choice to attract and retain a qualified workforce
- SFMTA's ability to capture knowledge capital and build succession plans for critical job functions will be vital to achieving its future goals and objectives
- The public will have increased expectations for improved customer service
- SFMTA will be expected to give more timely and accurate customer information such as way finding signage or real-time service data
- Improving efficiencies to support cost controls and increasing existing and new revenue sources will enable SFMTA to balance its budget while providing expanded, more efficient services

As a result of incorporating public comment from the Board vision meetings and data from

SFMTA Strategic Priorities – 2012

the future assumptions, strategic priorities were developed that identify what must be accomplished if the Agency is to successfully exist in this future environment. These priorities will help guide the Agency moving forward and were the basis for the agency goals. In addition, these priorities reflect the governing policies of the San Francisco Municipal Transportation Agency, including the charter

SFMTA Strategic Priorities

- SFMTA carries out San Francisco's Transit First policy by prioritizing public transit, walking, bicycling and auto-alternative modes
- SFMTA provides safe, accessible, reliable, clean and environmentally sustainable service for all modes
- SFMTA gets its customers where they want to go, when they want to be there
- SFMTA is respected in the community
- SFMTA is a leader in a well-integrated regional transportation system

TRANSIT FIRST POLICY

The "Transit First" policy states that all officers, boards, commissions, and departments shall implement the following principles in conducting the City and County's affairs:

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 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.
4. Pedestrian areas shall be enhanced wherever possible to improve the safety and comfort of pedestrians and to encourage travel by foot.
5. Bicycling shall be promoted by encouraging safe streets for riding, convenient access to transit, bicycle lanes, and secure bicycle parking.
6. Parking policies for areas well served by public transit shall be designed to encourage travel by public transit and alternative transportation.
7. 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.

amendments that impact the agency's governance (Proposition E), and Section 16.102 of the City Charter, the "Transit First" policy, which encourages the use and enhancement of public transit and alternative (other than private automobile usage) transportation.

- SFMTA is financially stable, and respected for effective resource utilization
- SFMTA takes care of its people by providing a flexible/supportive work environment
- SFMTA's workforce is capable of leading the agency into the ever-evolving, technology-driven future; taking pride and ownership of the agency's mission and vision

SFMTA Vision for 2012

Based on the identified strategic priorities, the SFMTA Board of Directors developed a vision statement to capture what success will look if the Agency has successfully implemented the identified strategic priorities over the next five years.

Providing timely, convenient, safe and environmentally friendly transportation alternatives...SFMTA enhances the quality of life of San Francisco

The vision includes several key elements:

- Service that gets San Franciscans where they want to be in a timely manner (whether by bicycle, car, walking or transit)
- An increased level of convenience for those who utilize roadways through transit
- A safe environment for all San Francisco travelers is paramount to the success of the agency
- Incorporating a city-wide vision for a “greener San Francisco,” SFMTA will provide renewed focus on environmental impacts of City transportation
- Accomplishment of SFMTA’s efforts over the next five years will result in an enhanced quality of life of all those who travel in and through the City

SFMTA Strategy

Goals, Objectives, & Key Performance Indicators

Goal 1: Customer Focus:

The first goal seeks to add increased focus and priority to several key issues that have impacted and will continue to impact the agency into the future. At the top of this list is safety. While the SFMTA has made improvements in this area, the agency has taken a proactive approach to assessing improvements in this area. This improvement effort includes not only a focus on major incidents, but also improving the culture of safety within the organization for the future.

The second objective seeks to provide a cleaner environment for our customers. Whether in our stations, rail cars, buses or any other facility, the Agency is to provide renewed attention and investment to enhance the transit rider's experience. Reducing customer complaints

for cleanliness and increasing satisfaction will follow. The third objective will be to ensure the Agency becomes a leader in sustainable transportation. The benefits of more riders taking transit, walking or bicycling over automobile usage can improve air quality, quality of life and reduce overall dependence on oil. Therefore, we need to ensure we identify and invest in those initiatives which will not only comply, but also demonstrate leadership in sustainability for the transportation industry.

The next objective seeks to increase accessibility to all who desire to use our and services. This emphasis goes beyond facility or equipment changes, but also changing how we care for our customers with all levels of ability.

The final objective will be to help San Franciscans find alternative solutions to accessing the city than by automobile

Goal 1

Goal	Objectives	Initiatives	Example Key Performance Indicators
To provide safe, accessible, reliable, clean and environmentally sustainable service and encourage the use of auto-alternative modes through the Transit First Policy."	1.1 Improve safety and security across all modes of transportation	1.1a Proactive Transit Watch campaign	1.1 Number of safety incidents per 100,000 vehicle miles
		1.1b Safety and Security Communications Outreach campaign	1.2a Customer satisfaction scores for "cleanliness"
	1.2 Improve cleanliness of SFMTA stations and vehicles by providing a clean, comfortable experience	1.2 Clean MTA Campaign	1.2b Percentage of "passing" Quality Checks
		1.3 Clean Air Fleet Plan	1.2c Cleaning per 100,000 vehicle miles
	1.3 Reduce emissions as required by the SFMTA Clean Air Plan	1.4 Transit Access Campaign	1.2d Cleaning per station/terminal
		1.5 Complete Bicycle and Pedestrian Master Plan	1.3 Percent of vehicle miles of zero emission vehicles (as % of total fleet) per quarter
	1.4 Improve accessibility across transit service		1.4a Percentage operating lifts (total volume/total working)
			1.4b Percentage of fleet with verbal Digital Voice Announcement System
	1.5 Increase percentage of trips using more sustainable modes (such as transit, walking, bicycling, and rideshare)		1.4c Number of complaints
			1.5a Percentage of single occupant vehicle trips/total trips taken
			1.5b Percentage of bike, pedestrian and transit trips
			1.5c Number of passengers/trip (by route)

Emphasizing bicycles, the pedestrian environment and enhancing the quality of public transportation will enable those who desire alternative travel modes to seek out, explore and take advantage of the many opportunities available.

Goal 2: Customer Focus:

The second goal is primarily focused on the transportation services we provide directly to our customers. Within the first objective there is a realization at SFMTA that if we are to be successful in the future, as a minimum we must be able to achieve existing customer requirements as well as Proposition E goals

for on-time, reliable service. This objective becomes the cornerstone of our strategic plan. Without improved service, we will not be able to improve our image (Goal 3), we will not be able to attract and retain customers and the revenue that they provide (Goal 4), and our employees will not have the resources they need to deliver the required services (Goal 5).

The second objective is for the Agency to consider the span of service we provide. Determining if our service delivery remains relevant to both the current and emerging needs of our customers, and ensuring the necessary adjustments are made on an on-going basis, will ensure SFMTA stays relevant to all those

Goal 2

Goal	Objectives	Initiatives	Example Key Performance Indicators
To get customers where they want to go, when they want to be there.	2.1 Transit Reliability: Improve on-time performance to 85% 2.2 Transit Connectivity and Span of Service 2.3 Fulfill bicycle and pedestrian network connectivity 2.4 Reduce congestion through major corridors 2.5 Manage parking supply to align with SFMTA and community goals	2.1-2.2 Being developed in coordination with the Transit Effectiveness Project decision framework Possible initiatives include: ▶ Route restructuring ▶ Proof of payment on bus system ▶ City wide transit signal priority ▶ PCO deployment to improve on-time performance 2.3 Complete bicycle and pedestrian master plan 2.4a Implement SFgo program 2.4b Continued implementation of comprehensive traffic calming program 2.5a On-street parking management 2.5b Implement parking garage guidance system	2.1a Schedule adherence and travel time 2.1b Mean distance between failures by vehicle type (mode); rate of unscheduled absenteeism; extra-board availability 2.2a TEP Placeholder (e.g., transit ridership on transit priority network) 2.2b TEP Placeholder 2.3 Number of miles of bike lanes as a percentage of total miles proposed in the bicycle plan 2.4 Reduced number of congested locations identified in the Congestion Management program 2.5a Maintain 85% on street parking meter occupancy (annual measure via sample) 2.5b Maximize off-street parking occupancy 2.5c Optimal balance of occupancy and revenue of garage operations

who are impacted by our transportation network. The Transit Effectiveness Project (TEP) is conducting a more robust analysis of these issues, and therefore emphasis on these objectives will be refined as the findings from the TEP are completed.

The third and fourth objectives look at additional customer segments such as bicyclists, pedestrians and users of our roadways to ensure we are providing them the best possible environment to support their mobility needs. While related to the Goal 1 objectives (reducing automobile trips), these objectives seek to provide the emphasis and investment needed for all service modes and for all customer segments.

Goal 3: External Affairs – Community Relations

There were three objectives that focused on SFMTA's need to improve its stakeholder relationships, internal, and external customer communication. The first centered on the Agency's need to build relationships with business and community partners to help develop a system that meets their needs. Building partnerships will help ensure all voices are heard while at the same time providing additional support to promote SFMTA services.

The second objective was focused on improving SFMTA's image both externally and internally. Through increased outreach and the development of a more effective communication tools, the Agency will be able to better inform key customers, stakeholders and employees while effectively marketing its success as goals and objectives are achieved.

Goal 3

Goal	Objectives	Initiatives	Example Key Performance Indicators
To improve the customer experience, community value, and enhance the image of SFMTA, as well as ensure SFMTA is a leader in the industry.	<p>3.1 Improve economic vitality by growing relationships with business, community, and stakeholder groups</p> <p>3.2 Pursue internal and external customer satisfaction through proactive outreach and heightened communication conduits</p> <p>3.3 Provide a working environment that fosters a high standard of performance, recognition for contributions, innovations, mutual respect, and a healthy quality of life</p> <p>3.4 Enhance proactive participation and cooperatively strive for improved regional transportation</p>	<p>3.1 Business partnership campaign</p> <p>3.2 Internal & external customer communication plan</p> <p>3.3 Managerial Communication training</p> <p>3.4 Heightened regional transportation policy-level engagement</p>	<p>3.1 Develop baseline to reduce customer inquiries/complaints</p> <p>3.2 Develop baseline to reduce customer inquiries/complaints</p> <p>3.3 Increase percentage point ratings of SFMTA employee survey</p> <p>3.4 Develop baseline to increase percentage of SFMTA participation in community/civic events</p>

The final objective was designed to re-energize SFMTA's leadership and participation in regional transportation activities. By providing leadership and appropriate levels of engagement with our regional partners, the Agency will promote the impact of public transit and regional connectivity.

Goal 4: Financial Capacity

One of the fundamental drivers of the potential future success of SFMTA is its financial health. The SFMTA Board of Directors and Executive Leadership have recognized that accomplishing its objectives will only be possible from a healthy financial position—one that is stable year to year and that is valued for its financial stewardship.

The first objective identified was to increase new funding sources and to grow existing revenue

sources. This continuous focus on increasing revenue will enable SFMTA to maximize opportunities available for revenue during periods of severe deficit projections. Associated with this objective is a focus on improving compliance with existing revenue streams such as fare box revenue. Through improved fare compliance, the Agency will ensure that all customers pay their fair share in supporting the operation costs of our key services, thereby improving customer perceptions of equity within the system and ultimately their general satisfaction with the services.

An additional objective will be to reduce the cost of business which will further improve SFMTA's financial stability. The Agency recognizes that there are many opportunities to continuously improve efficiency and to control cost. This effort will focus on continuous improvement and working with our key partners to better control costs while improving service delivery.

Goal 4

Goal	Objectives	Initiatives	Example Key Performance Indicators
To ensure financial stability and effective resource utilization.	4.1 Increase revenue by 20% or more by 2012 from improving collections and identifying new sources	4.1a Revenue generation plan	4.1a Amount of annual budgeted new revenue sources per year
		4.1b Optimize collection efforts from existing sources	4.1b Ratio of total revenue to total expense
		4.1c Create financial management reporting system	4.2a Vehicle miles per operating expense (annually)
	4.2 Ensure efficient and effective use of resources	4.1d Increased enhancement activities	4.2b Passenger miles per operating expense
		4.2a Improve procurement, inventory management, and contract administration systems	4.2c Customers per total labor and fringe expenses
		4.2b Identify, evaluate and report on key cost drivers	
		4.2c Evaluate cost/benefits of expenditure categories	

These objectives are especially vital as SFMTA seeks to improve safety, environmental compliance, and cleanliness (Goal 1), timeliness, reliability, and span of service (Goal 2), improve the working environment and workforce effectiveness (Goal 5) and develop an information technology infrastructure that supports organizational management information and communication needs.

Goal 5: SFMTA Workforce

Probably one of the most extensive goal areas was associated with ensuring SFMTA has a future workforce that is well-training has the tools and resources necessary to complete their job functions and help grow the capacity of their agency by bringing their strengths to dif-

ferent roles within the Agency. The Agency has recognized that significant work is required to attract and retain a workforce needed to deliver improved service, and improving the impact of the SFMTA as an “employer of choice” within the transit industry. We want to ensure that the SFMTA becomes a driving force for attracting and retaining the ‘best and brightest’ employees, and that for those that are here, that they have the opportunity to grow their skills with the agency’s investment in its workforce.

By providing a flexible, supportive work environment and developing a capable workforce that takes pride and ownership in their roles within the Agency, SFMTA will ensure that the most critical building block to success—its people—have the support they need to ensure a workforce that takes pride in continuous improve-

Goal 5

Goal	Objectives	Initiatives	Example Key Performance Indicators
To provide a flexible, supportive work environment and develop a workforce that is capable of leading the agency into the ever-evolving, technology driven future, that takes pride and ownership of the agency’s mission and vision.	5.1 Increase resources available for employees in performing their jobs (tools, staff hours, etc)	5.1 Tool enhancement initiative	5.1a Dollars spent on tools/labor hours by division and/or classification
	5.2 Improve facilities in which people are working	5.2 Facilities enhancement initiative	5.1b Efficiencies gained on the job (measured by % time saved on activities)
	5.3 Improve internal communication (improve employee satisfaction)	5.3 Managerial Communication Program	5.1c Employee survey results (Tools)
	5.4 Increase internship/apprentice opportunities to fill critical positions (determine current and future critical needs and create opportunities)	5.4 Internship/ apprentice Program (Transit Tech Academy)	5.2a Dollars spent on facility improvements, employees survey results on tools and facilities
	5.5 Improve SFMTA’s ability to grow and retain strong leadership (Succession Planning)	5.5 Executive development/ succession planning program	5.2b Efficiencies or money saved on reduction in sick leave
			5.2c Employee survey results (facilities)
			5.3a Percentage of employee complaints
			5.3b Employee satisfaction rate (internal communication)
			5.4a Volume of internship/apprentice opportunities by prioritized job classification versus previous year
			5.4b Number of internships able to be filled (tracked annually)
			5.5a Percentage participation of hires/newly promoted managers
			5.5b Percentage participation of senior management
			5.5c Increased understanding of SFMTA priorities, expectations, culture and competencies by management (survey results or annual focus groups)

ment is retained. Key objectives include ensuring employees have the tools and facilities they need, improving internal communication mechanisms, increasing opportunities to identify new candidates for critical service jobs and building a capable leadership team of the future with consistent succession planning. Implementing these objectives will be fundamental steps in creating a viable, effective workforce and work environment.

The last objectives within the Human Resource area focus on improving human resource information availability and internal communication.

These technology -related improvements will enable the effective management of the workforce in addition to capturing valuable knowledge capital during a period that will see the retirement of a significant number of its experienced workforce

Goal 5 (cont)

Goal	Objectives	Initiatives	Example Key Performance Indicators
To provide a flexible, supportive work environment and develop a workforce that is capable of leading the agency into the ever-evolving, technology driven future, that takes pride and ownership of the agency's mission and vision.	5.6 Improve the performance management process across all classifications (Increase the number of performance expectation discussions and employee assessments)	5.6 Performance management system 5.7 Leadership and Management Training program 5.8 Work/life balance enhancement program	5.6a Volume of employee expectation meetings conducted, volume of assessments completed by directorate 5.6b Employee satisfaction rate (1.communication, opportunities, etc.) 5.6c Retention rate % (by Division) 5.7a Percentage of external hires and new promoted managers 5.7b Percentage participation of senior management 5.7c Increased understanding of SFMTA priorities, expectations, culture and competencies by management (survey results or annual focus groups)
	5.7 Leadership and Management Training 5.8 Improve work/life balance of employees (ex. daycare options, costs of getting to work, etc.)		5.8a Increased Awareness of and Participation in the following programs: measured quarterly Commuter check program (X%) ▶ Corporate discounts available to staff (gym memberships, etc.) ▶ Flexible scheduling for specified job categories 5.8b Increase in Employee satisfaction survey (wellness, work environment, etc.)
	5.9 Improve access to Human Resource System information	5.9 Human Resource Information System	5.9a Percentage completed (quarterly/annually) 5.9b Project measures to be defined
	5.10 Improve access to knowledge capital across the SFMTA (HR portal)	5.10 Human Resource Portal (Consistent with city of SF/DHR milestones)	5.9c Efficiencies measured annually after completion (measures to be defined in collaboration with city of SF) 5.10a Percent completed (information available) (quarterly/annually) 5.10b Increased employee satisfaction from survey (communication)

Goal 6: Information Technology

Throughout the strategic planning process one of the most prevalent recurring themes was how the agency could take advantage of information technology improvements. The efforts will serve to increase the availability of management information to support improved efficiency and the application of available service improvement technologies.

The first objective in this goal area was designed to leverage existing systems currently in use by the agency to include providing more effective, timely management information to all

levels of the organization. This would enable an improved, less manually-intensive reporting capability thereby improving the Agency's ability to identify and react to key management information.

The second objective was to continuously identify technology solutions for improving service delivery and convenience to the customer. This objective will help the Agency identify an investment strategy that focuses technology solutions on the most important aspects of our improvement efforts. By identifying improvement needs, potential technology solutions and prioritizing key investments, SFMTA will ensure the most effective use of its resources and improvement efforts.

Goal 6

Goal	Objectives	Initiatives	Example Key Performance Indicators
To Improve service and efficiency, the SFMTA must leverage technology.	6.1 Information and Technology Leadership: Identify, develop and deliver the new and enhanced systems and technologies required to support SFMTA's 2012 goals	<p>6.1a Identify and deliver key transportation technologies which create business value and improvements to efficiency and effectiveness</p> <p>6.1b Provide an environment where information is timely, accurate, and seamlessly accessed from multiple sources and stakeholders in order to improve decision making and support regulatory compliance</p> <p>6.1c Ensure efficient and effective use of information technology assets and systems</p> <p>6.1d Develop more secure, flexible and mobile ways to access and disseminate information</p>	<p>6.1a Improve the return on our technology investments (metrics individual to each project)</p> <p>6.1b Number of successful intelligent technology initiatives deployed</p> <p>6.1c % Project completed on time > 80%</p> <p>6.1d % Project completed on budget for each phase > 80%</p> <p>6.1e Project Customer Satisfaction > 80%</p> <p>6.1f Improved information use and communication to our internal employees and external customers (KPI defined by survey)</p>

Conclusion

The publication of this strategic plan represents the culmination of a five month effort that sought to envision the future of the Agency and then develop the strategies that we must execute to achieve that vision. The effort has been overseen by our key stakeholders and the public and has included participation by the SFMTA Board of Directors to create the vision and strategic priorities, the Executive Director's staff to identify the strategy, and goal teams, comprised of staff from across the Agency, to identify the initiatives required to execute the strategies.

SFMTA's strategic planning process will continue to improve over time, incorporating more opportunities to further refine the plan through annual updates and to create better communication forums to improve the reach of information. The goal of this first effort is to identify the actions the agency must take today to be successful tomorrow. This document is not meant to sit on the shelf, but rather serve as a guidepost for future policy decisions that everyone from front line staff to executive leaders, must take into account to ensure a strong and consistent future for the agency. To achieve our vision we must take action. We must execute against the plan by using it as a tool to help guide our decisions. The key element of the plan that will ultimately determine its success is how well we utilize it in our management-decision making. At all levels of the Agency, managers and employees must consider how their decisions and actions support our organizational strategy.

To help implement this plan, the Board of Directors and the Executive Director's Staff will begin using the plan in the Annual Budget

process by funding those initiatives that have been identified against proposed objectives. To ensure the Agency stays on course, the Board of Directors and the Executive Director's staff will also continuously monitor key performance indicators against targets. Senior leadership will be able to gauge progress as well as review the status of the associated initiatives. The success of our efforts will be fundamentally driven by our ability to execute our initiatives.

Finally, the plan is meant to be a living document. It should be continually reviewed and changed as we progress forward. Key performance indicators should provide us the management information we need to track progress, however, if we find that there are more relevant measures of our progress, then these should be changed accordingly. If initiatives are not enabling our progress against our objectives, then they must be altered or new initiatives must be identified and resources reapplied accordingly. What remains solely important is our continued progress against this plan. Providing timely, convenient, safe and environmentally friendly transportation alternatives and enhancing the quality of life of those we serve should be our top priority.

**For additional feedback on this document,
please send your comments to
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MTA

Municipal Transportation Agency