Strategic Plan Progress Report
Goal 3 Focus

November 2016

San Francisco, California

Goal 3 focus

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 3.3

Allocate capital resources effectively

Objective 3.4

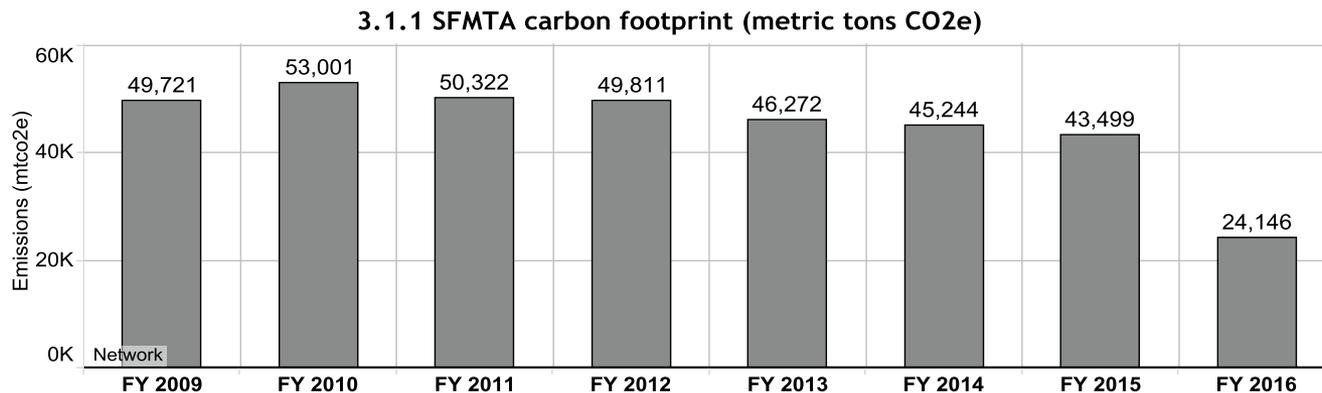Deliver services efficiently

Objective 3.5

Reduce capital and operating structural deficits

Objective 3.1

Reduce the Agency's and the transportation system's resource consumption, emissions, waste, and noise

Key performance indicator

3.1.1 SFMTA carbon footprint (metric tons CO2e)

Emissions (mtco2e)

Year	Value
FY 2009	49,721
FY 2010	53,001
FY 2011	50,322
FY 2012	49,811
FY 2013	46,272
FY 2014	45,244
FY 2015	43,499
FY 2016	24,146

Network

Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	Target	FY13 Avg	FY14 Avg	FY15 Avg	FY16 Avg	FY17 Avg
3.1.1	**SFMTA carbon footprint (metric tons CO2e)**		46,272	45,244	43,499	24,146	*
3.1.2	% of SFMTA non-revenue fleet that is alternative fuel/zero emissions		28.0%	28.1%	28.5%	42.2%	*
3.1.2	% of SFMTA taxi fleet that is alternative fuel/zero emissions		94.0%	98.0%	98.0%	94.6%	94.6%
3.1.4	Number of electric vehicle charging stations		63	63	63	63	*
3.1.6	Agency electricity consumption (kWh)		9,790,994	9,944,080	9,783,200	9,957,470	*
3.1.6	Agency gas consumption (therms)		32,049	23,057	19,265	22,829	*
3.1.6	Agency water consumption (gallons)		1,476,801	1,903,909	1,735,422	1,503,979	1,608,948
3.1.7	Agency waste diversion rate		37.9%	37.1%	34.5%	35.1%	34.0%

* Data forthcoming

[3.1.3]Upon the adopted use of renewable diesel for the Muni fleet in January 2016, the SFMTA no longer reports metric 3.1.3 (Percentage biodiesel to diesel used by SFMTA)

[3.1.6]Figures reflect monthly average consumption and do not include resource consumption at facilities leased by the SFMTA.

Note: Reported results are subject to change as data quality improves or new data become available.

Color Legend

Outperforms Previous FY Average	Underperforms Previous FY Average	Equal to Previous FY Average

Objective 3.1 action items

Reduce the Agency and transportation system's resource consumption, emissions, waste, and noise

Key action item updates

3.1.B   Develop and implement actions to reduce potable water use from transit vehicle washing

Background report and initial recommendations complete. Additional water conservation efforts include: the agencywide water fixture replacement project (expected completion by end of 2016); and the safety and water conservation improvements to the landscaped areas of Forest Hill station (grant application to be submitted to SFPUC at the end of November).

3.1.C   Conduct a Sea Level Rise Vulnerability Assessment for San Francisco's Transportation System.

Agency staff has developed a draft list of data that reflects the transportation system, and are convening an agency wide climate adaptation working group that can guide our climate / resiliency work.

3.1.D   Develop an update to the 2020 Clean Air Plan to reduce GHG Emissions from agency fleets and fuels.

The SFMTA remains in full compliance with all existing and proposed clean air-related regulations. Anticipated completion of the update to the Clean Air Plan is fall 2017, and will be based on SF-specific vehicle requirements and infrastructure using California Air Resources Board (CARB) regulations and agency zero-emission bus experiences.

Action item status

20% encountering issues

40% at risk
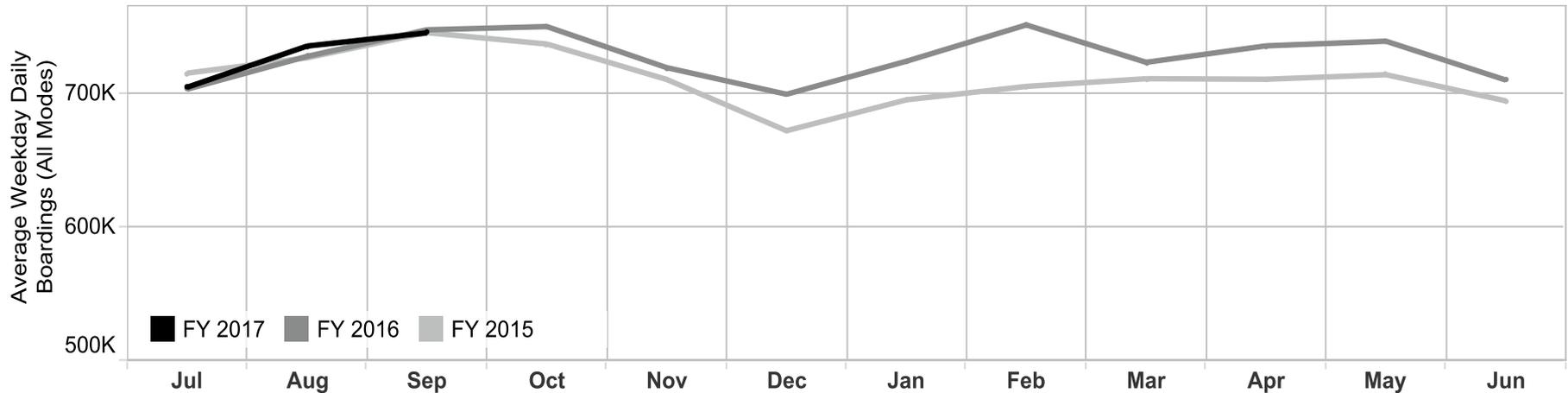
40% on track

0% on hold

0% completed

Objective 3.2

Increase the transportation system's positive impact to the economy

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Key performance indicator

3.2.1 Muni average weekday boardings

Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	Target	FY15 Avg	FY16 Avg	Oct 2015	Sep 2016	Oct 2016
3.2.1	Muni average weekday boardings		710,877	726,476	749,500	744,870	*

Note: Reported results are subject to change as data quality improves or new data become available.

Objective 3.2 action items

Increase the transportation system's positive impact to the economy

Key action item updates

3.2.A   Develop an implementation plan for innovative fare products.

SFMTA staff submitted comments on the draft Technical Specifications package for the update to Clipper. The requirements will include ability to add additional products such as accumulator passes, time-based fares and a low-income fare category in order to transition Lifeline Customers to Clipper. MTC plans to release the request for proposal (RFP) for industry review in early 2017.

3.2.B   Implement an enhanced mobile ticketing solution.

On a month over month basis, sales increased nearly 16% to $207,000 in October. We have approximately 71,000 accounts to date and expect to launch Rate My Ride before the end of the year. Forthcoming marketing will focus on cable car turnarounds, TVMs, high volume cash boarding locations, and the fare differential.

Action item status

0% encountering issues
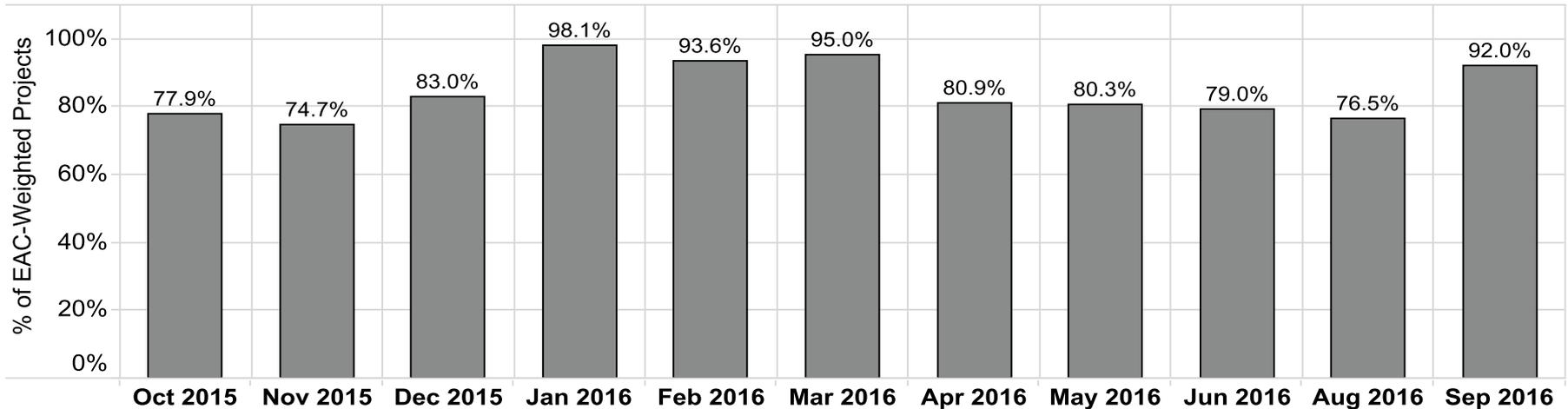
33% at risk

67% on track

0% on hold

0% completed

Objective 3.3

Allocate capital resources effectively

Key performance indicator

3.3.1 Percentage of all capital projects delivered on-budget by phase

Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	Target	FY16 Avg	FY17 Avg	Oct 2015	Sep 2016	Oct 2016
3.3.1	**Percentage of all capital projects delivered on-budget by phase**		**81.3%**	**85.1%**	**77.9%**	**92.0%**	*
3.3.2	Percentage of all capital projects delivered on-time by phase		97.8%	91.5%	55.3%	90.3%	*

3.3.1Reported results currently exclude projects in the Sustainable Streets Division portfolio. No data for reporting project delivery budget performance is available for July 2016. Data forthcoming after measure methodology is revised
Note: Reported results are subject to change as data quality improves or new data become available.

Objective 3.3 action items

Allocate capital resources effectively

Key action item updates

3.3.F Establish and implement an Enterprise Asset Management System (EAMS)

Staff completed Phase 1 to operationalize EAMS for Maintenance of Way business units in October, and are currently in a final review processes in preparation to go live with Materials Management. Digitizing Asset Management for MOW brings value by being able to utilize data to understand work load management, equipment issue trends, on time performance indicators, and, over time, ease of historical information for required reporting.

3.3.H Develop Cost/Benefit analysis during project initiation that includes impacts to Operations

The SFMTA Capital Finance analysis team is currently identifying connections between capital and operations budget development and how to best account for life-cycle costs of capital projects. Staff are reviewing best practices in linking Capital Project planning to Operations and Maintenance planning.

Action item status

14% encountering issues

14% at risk

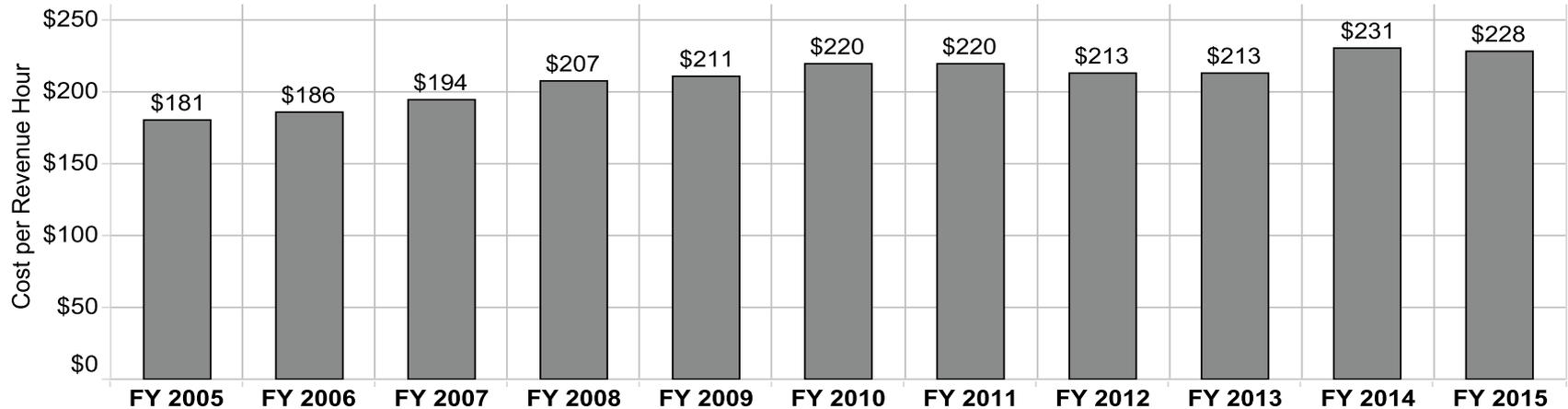72% on track

0% on hold

★ 0% completed ★

Objective 3.4

Deliver services efficiently

Key performance indicator

3.4.1 Transit Cost per Revenue Hour

Bar chart showing Cost per Revenue Hour by fiscal year:
- FY 2005: $181
- FY 2006: $186
- FY 2007: $194
- FY 2008: $207
- FY 2009: $211
- FY 2010: $220
- FY 2011: $220
- FY 2012: $213
- FY 2013: $213
- FY 2014: $231
- FY 2015: $228

Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	Target	FY15 Avg	FY16 Avg	FY17 Avg	Oct 2015	Oct 2016
3.4.1	**Average annual transit cost per revenue hour**	**$192**	**$227.69**	*			
3.4.2	Passengers per revenue hour for buses		69	*			
3.4.3	Cost per unlinked trip		$3.29	*			
3.4.5	Farebox recovery ratio		29.5%	*			
3.4.7	Number of individuals entering Transit Operator training per month		594	295	75	30	*

3.4.1, 3.4.3 Figures are adjusted for inflation to reflect FY15 dollars.

3.4.1, 3.4.2, 3.4.3, 3.4.5 Based on preliminary unaudited financials.

3.4.7 Fiscal year total.

Note: Reported results are subject to change as data quality improves or new data become available.

Objective 3.4 action items

Deliver services efficiently

Key action item updates

| 3.4.D   Improve parts availability on rail |

Increased collaboration between Rail Maintenance and Materials Management has improved parts availability for the light rail fleet through an expansion of the VMI pilot. Next steps include finalizing approach to add additional parts to VMI contract.

| 3.4.E   Evaluate and implement schedule deployment efficiencies |

Schedule efficiencies for the winter 2017 schedule are under development including identifying cost neutral ways to address crowding and congestion related travel time delays.

Action item status

0% encountering issues

0% at risk
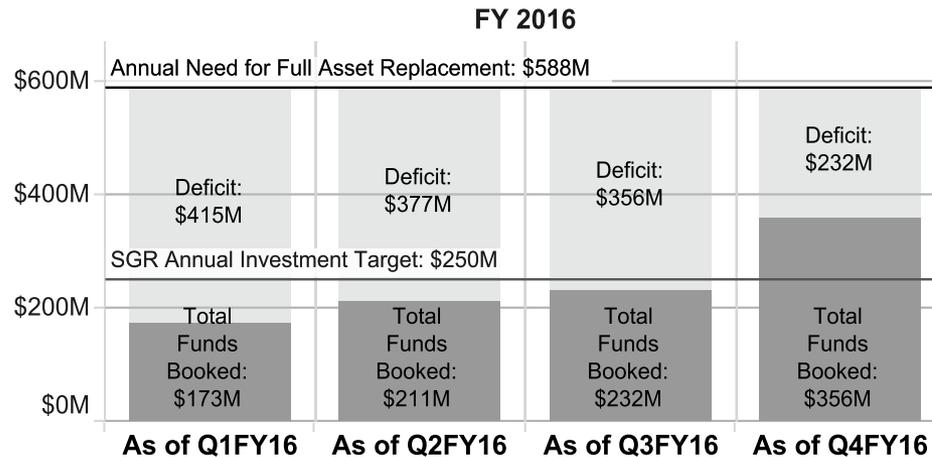
67% on track

33% on hold

0% completed

Objective 3.5

Reduce capital and operating structural deficits

Key performance indicator

3.5.1 Structural capital budget deficit (SGR)

FY 2016

Annual Need for Full Asset Replacement: $588M

	As of Q1FY16	As of Q2FY16	As of Q3FY16	As of Q4FY16
Deficit	$415M	$377M	$356M	$232M
Total Funds Booked	$173M	$211M	$232M	$356M

SGR Annual Investment Target: $250M

Additional $1.7B 5-year shortfall for bike, pedestrian, facilities and transit

Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	Target	FY16 Avg
3.5.1	Structural capital budget deficit (State of Good Repair)	Make progress towards closing State of Good Repair structural deficit	$232 Million
3.5.1	Structural operating budget deficit (State of Good Repair)	Make progress towards closing operating structural deficit	*

[3.5.1]Structural capital budget deficit is defined as the difference between annual full asset replacement need for State of Good Repair and funds secured. Operating structural deficit is currently being estimated and will be available for reporting in January 2017.
Note: Reported results are subject to change as data quality improves or new data become available.

Objective 3.5 action items

Reduce capital and operating structural deficits

Key action item updates

3.5.A   Develop SFMTA Properties

Staff completed the surface parking lot transit-oriented development study (TOD). The Moscone Garage parking feasibility study and initial development feasibility analysis is underway. Staff are finalizing development MOU negotiations with MOHCD at 4th and Folsom and are developing third party design review scope of services for 4th and Folsom.

3.5.D   Advance and support T2030, including oversight of new revenue

Ballot initiatives to provide additional funding for transportation were decided on November 8th. The FY18 SFMTA Capital Budget includes an assumption of $45 million in new revenue. Expenditures from the $500M GO Bond approved by voters in 2014 are reported on a quarterly basis to the City's General Obligation Bond Oversight Committee and presented most recently at their October 3 meeting.

Action item status

0% encountering issues

0% at risk

100% on track

0% on hold

⭐ **0% completed** ⭐

Goal 3 financials

Expenditures (FY17 as of September 2016)

EXPENDITURES	Revised Budget[1]	Actuals Year to Date	Encumbrances	Total Projection for the Year [2]	Saving/(Overage)
SFMTA Agency Wide	$139,467,492	$16,016,019	$46,082,717	$137,626,339	$1,841,153
Board of Directors	$634,238	$135,221	$944	$585,549	$48,689
Capital Programs and Construction	$25,868	$3,526,001	$3,389,552	$25,868	$0
Communications	$8,466,087	$1,148,997	$1,318,589	$6,923,498	$1,542,589
Director of Transportation	$1,979,882	$291,485	$532,876	$1,894,999	$84,883
Finance and Information Technology	$120,303,808	$15,775,644	$42,453,634	$118,549,759	$1,754,049
Government Affairs	$1,332,093	$236,278	$221,333	$1,280,537	$51,556
Human Resources	$38,286,972	$6,099,419	$6,995,569	$37,855,027	$431,945
Safety	$6,183,801	$814,124	$2,642,630	$6,284,119	($100,318)
Sustainable Streets	$150,957,286	$23,645,183	$46,613,859	$145,951,899	$5,010,387
Transit Services	$610,607,644	$128,475,045	$68,689,579	$621,570,310	($10,962,666)
Taxi and Accessible Services	$33,798,606	$4,579,288	$25,398,331	$33,353,641	$444,965
TOTAL	**$1,112,043,777**	**$200,742,704**	**$244,339,613**	**$1,111,901,545**	**$147,232**

(1) Revised budget includes encumbrance and equipment carry forward from FY16 of $59.2 million.
(2) Expenditures projection is based on all encumbrance spent in FY2017.

Goal 3 financials

Revenues (FY17 as of September 2016)

REVENUE	Revised Budget	Actuals Year to Date	Total Projection for the Year	Surplus/(Deficit)
TRANSIT FARES				
Cable Car Fares	$27,725,000	$9,593,978	$27,725,000	($0)
Cash Fares	$84,550,000	$20,912,556	$84,550,000	$0
Other Fares	$4,240,000	$994,008	$4,240,000	$0
Passes	$89,365,000	$21,282,407	$88,007,514	($1,357,486)
TRANSIT FARES Total	**$205,880,000**	**$52,782,949**	**$204,522,514**	**($1,357,486)**
PARKING FEES & FINES				
General Fund Baseline Transfer	$74,260,000	$37,130,000	$74,260,000	$0
Citations and Fines	$104,998,892	$27,934,404	$104,998,892	$0
Garage Revenue	$70,577,578	$16,732,074	$70,577,578	$0
Meter Revenue	$58,411,840	$16,618,315	$61,473,262	$3,061,422
Permit Revenue	$16,282,000	$3,870,008	$17,041,330	$759,330
PARKING FEES & FINES Total	**$324,530,310**	**$102,284,801**	**$328,351,062**	**$3,820,752**
Operating Grants	$135,392,363	$14,214,747	$135,392,363	$0
Taxi Service	$8,375,682	$1,471,736	$3,234,815	($5,140,867)
Other Revenues	$29,729,000	$8,077,985	$32,406,601	$2,677,601
General Fund Transfer	$291,540,000	$145,770,000	$291,540,000	$0
Fund Balance for Current Year Budget	$45,000,000	$45,000,000	$45,000,000	$0
Transfer from Non-operating Fund	$13,494,244	$0	$13,494,244	$0
Fund Balance from Prior Year Encumbrance Carry Forward	$59,217,156	$59,217,156	$59,217,156	$0
TOTAL	**$1,113,158,755**	**$428,819,374**	**$1,113,158,755**	**$0**

Goal 3 financials

Overtime Report (FY17 as of September 2016)

FUND/DIVISION	ANNUAL REVISED BUDGET	ACTUAL FISCAL YEAR TO DATE[3]	PROJECTION FOR REMAINING MONTHS	END OF YEAR PROJECTION	SURPLUS (DEFICIT)
OPERATING FUND					
TRANSIT SERVICES DIVISION					
Transit Operators	$23,586,620	$6,652,492	$21,811,446	$28,463,937	($4,877,317)
Transit Vehicle Maintenance	$6,718,500	$3,029,725	$9,925,637	$12,955,362	($6,236,862)
Transit – All Others	$4,544,031	$2,311,812	$4,460,783	$6,772,596	($2,228,565)
Subtotal Transit Services Division	**$34,849,151**	**$11,994,029**	**$36,197,866**	**$48,191,895**	**($13,342,744)**
SUSTAINABLE STREETS DIVISION					
Parking Control Officers	$994,984	$405,740	($405,740)	$0	$994,984
Sustainable Streets – All Others	$794,714	$164,907	($135,875)	$29,032	$765,682
Subtotal Sustainable Streets Division	**$1,789,698**	**$570,647**	**($541,615)**	**$29,032**	**$1,760,666**
SFMTA AGENCY WIDE	**$0**	**$0**	**$0**	**$0**	**$0**
ALL OTHER DIVISIONS	**$709,466**	**$243,196**	**$797,363**	**$1,040,559**	**($331,093)**
TOTAL OPERATING FUND	**$37,348,315**	**$12,807,872**	**$36,453,614**	**$49,261,486**	**($11,913,171)**
NON OPERATING FUND					
Capital Programs & Construction	$0	$342,844	$1,124,078	$1,466,922	($1,466,922)
Sustainable Streets Engineering Programs	$0	$151,470	$496,622	$648,092	($648,092)
Total Non-Operating Fund	**$0**	**$494,314**	**$1,620,700**	**$2,115,014**	**($2,115,014)**
TOTAL	**$37,348,315**	**$13,302,186**	**$38,074,314**	**$51,376,500**	**($14,028,185)**

[3] Reported overtime actuals and resulting deficit are net of cost recovery for events or services that includes reimbursements for payroll (both regular and overtime), overhead, and other non-labor costs as applicable. The total actual cost recoveries is $ 666K (low because early in the fiscal year).

Goal 1 metrics

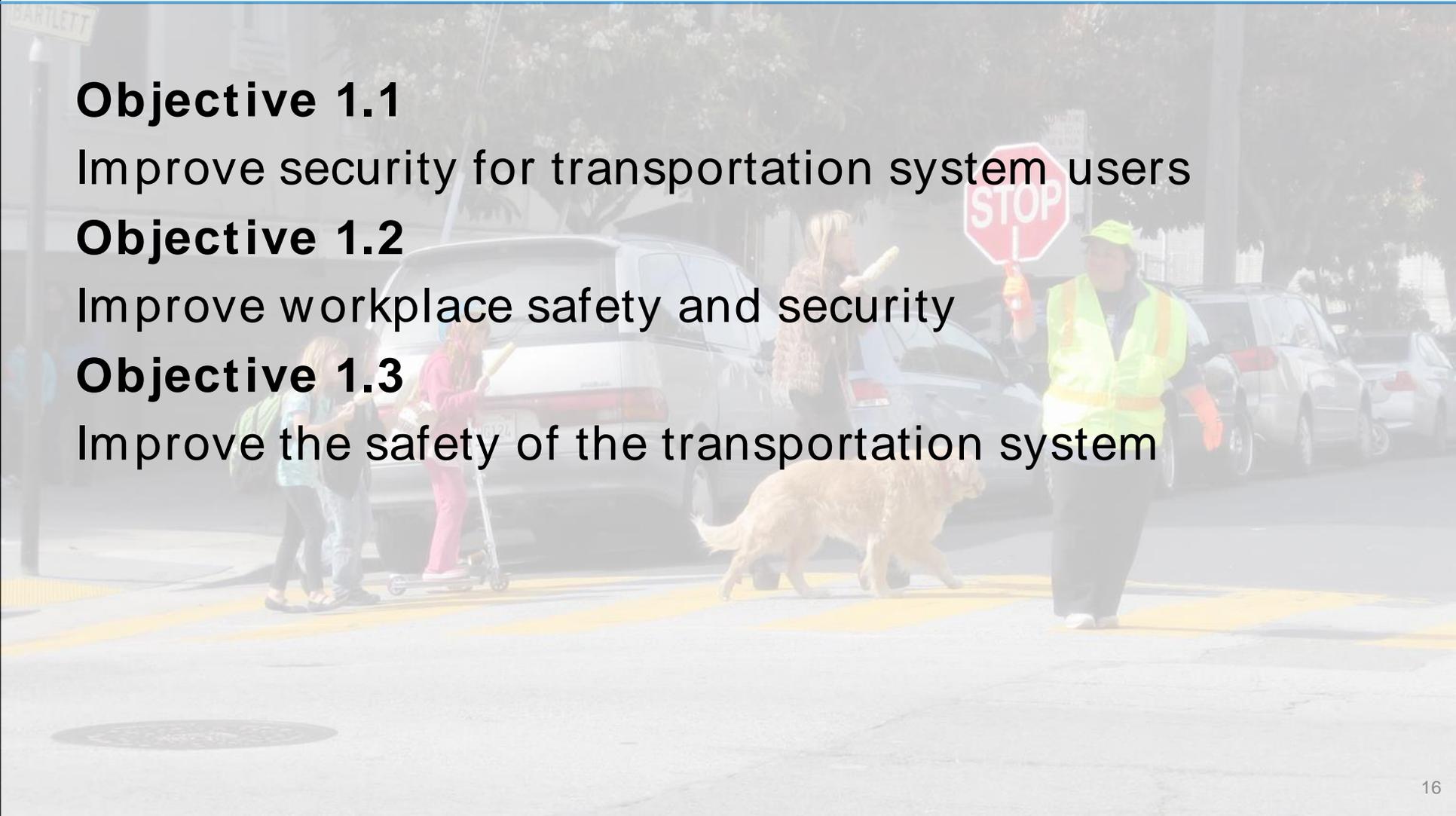Create a safer transportation experience for everyone

Objective 1.1

Improve security for transportation system users

Objective 1.2
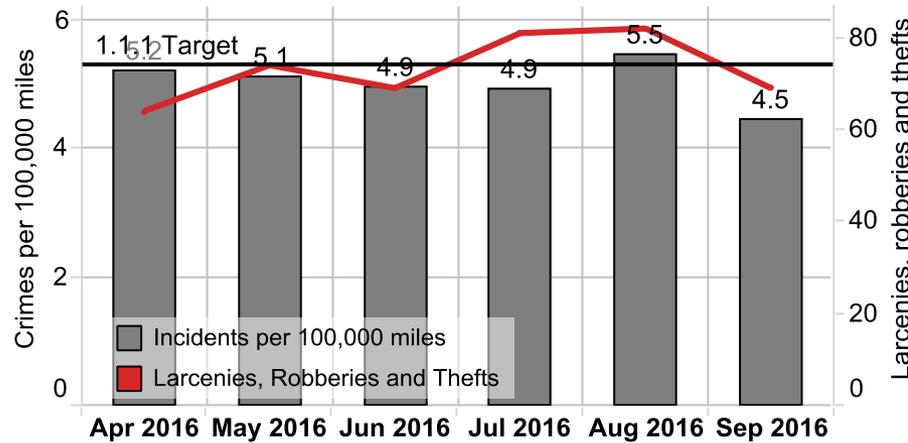
Improve workplace safety and security

Objective 1.3

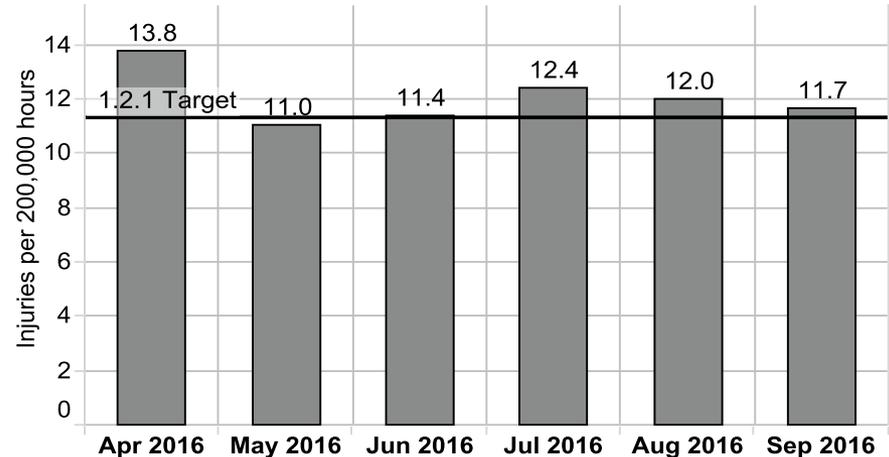Improve the safety of the transportation system
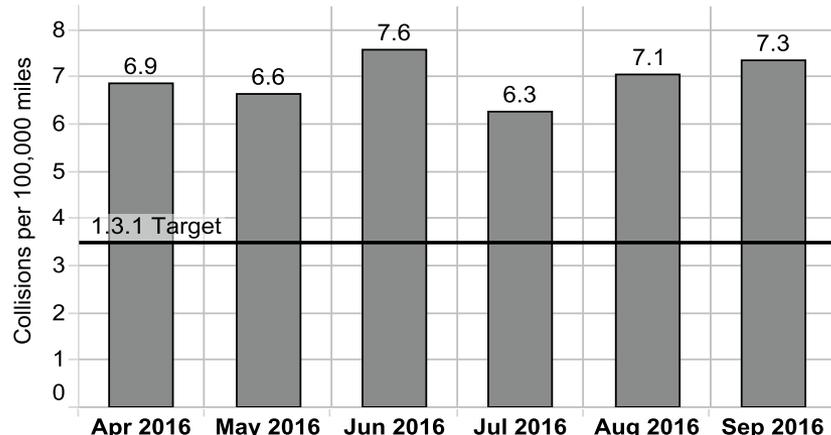
Goal 1 metrics

Key performance indicators

1.1.1 SFPD incidents per 100,000 miles

Crimes per 100,000 miles / Larcenies, robberies and thefts

1.1.1 Target

5.2, 5.1, 4.9, 4.9, 5.5, 4.5

Legend:
- Incidents per 100,000 miles
- Larcenies, Robberies and Thefts

Apr 2016 May 2016 Jun 2016 Jul 2016 Aug 2016 Sep 2016

1.2.1 Workplace injuries per 200,000 hours

Injuries per 200,000 hours

1.2.1 Target

13.8, 11.0, 11.4, 12.4, 12.0, 11.7

Apr 2016 May 2016 Jun 2016 Jul 2016 Aug 2016 Sep 2016

1.3.1 Collisions per 100,000 miles

Collisions per 100,000 miles

1.3.1 Target

6.9, 6.6, 7.6, 6.3, 7.1, 7.3

Apr 2016 May 2016 Jun 2016 Jul 2016 Aug 2016 Sep 2016

Note: Reported results are subject to change as data quality improves or new data become available.

Goal 2 metrics

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

Objective 2.3

Increase use of all non-private auto modes
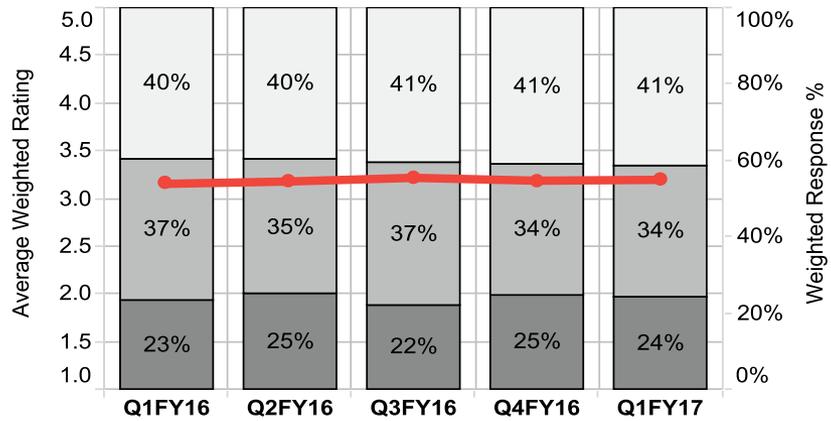
Objective 2.4

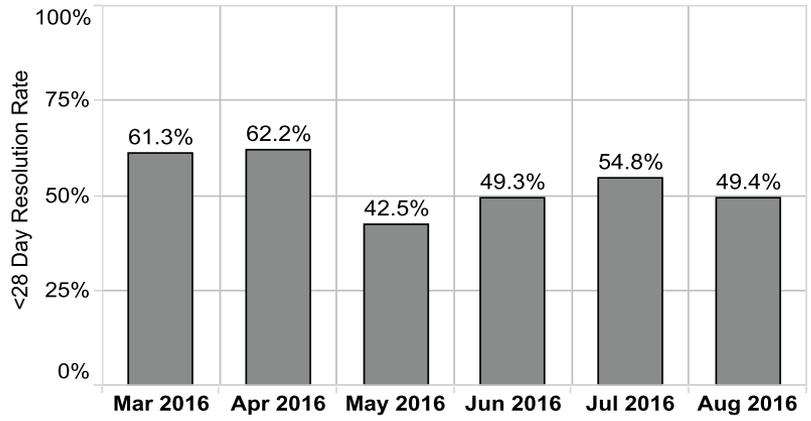Improve parking utilization and manage parking demand

Goal 2 metrics

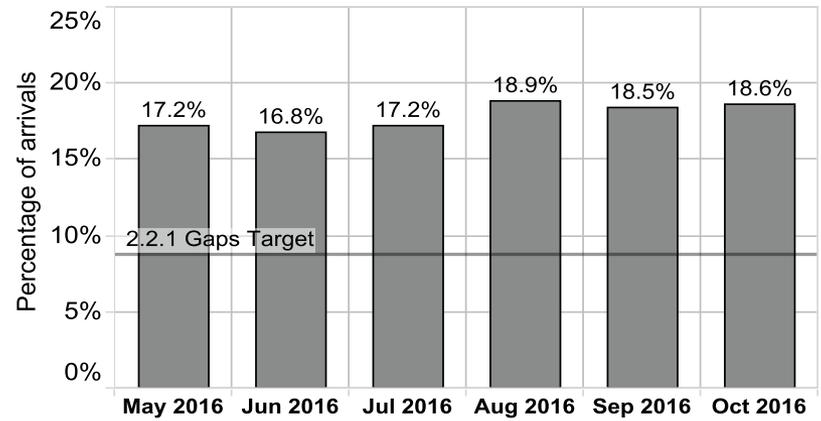## Key performance indicators

2.1.1 Customer rating: Overall satisfaction with transit services; scale of 1 (low) to 5 (high)
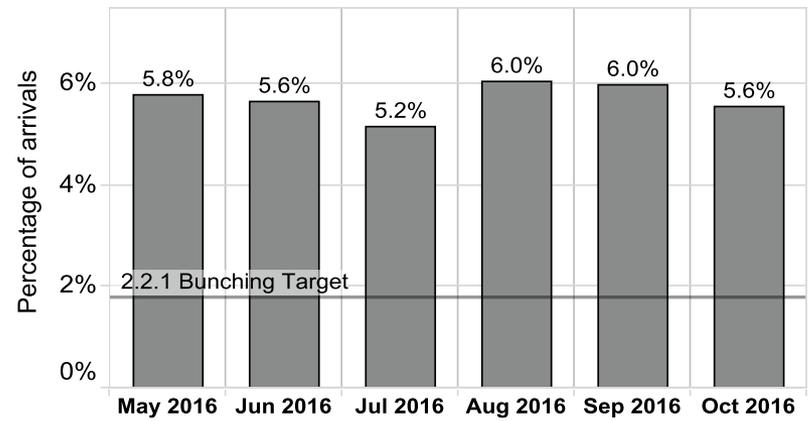

2.1.7 Percentage of actionable 311 Muni operator conduct complaints addressed within 28 business days

2.2.1 Percentage of Rapid Network transit trips with +5 min gaps

2.2.1 Percentage of Rapid Network transit trips with <2 min bunching (<1 min for headways of 5 min or less)

2.1.1Results are based on a non-probability sample from opt-in SFMTA online survey conducted quarterly and are weighted to reflect the geographic distribution of San Francisco's population.
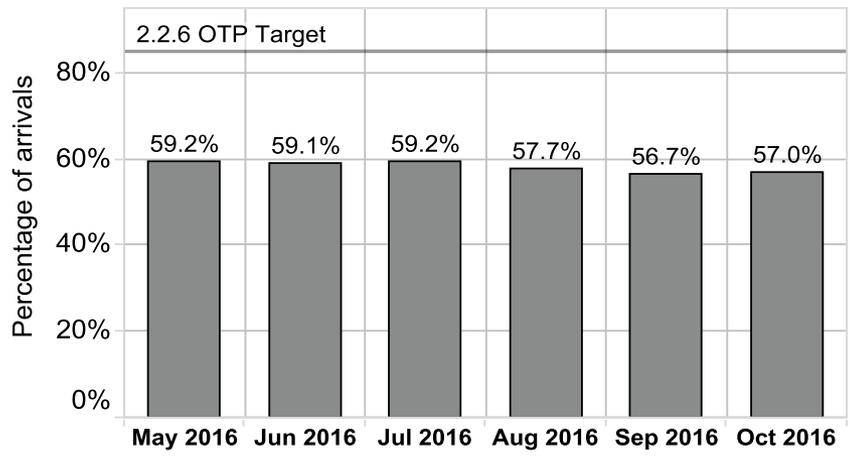
2.1.7Previously reported "Percentage of actionable 311 Muni operator conduct complaints addressed within 28 business days" results have been revised to reflect updated figures.

Note: Reported results are subject to change as data quality improves or new data become available.
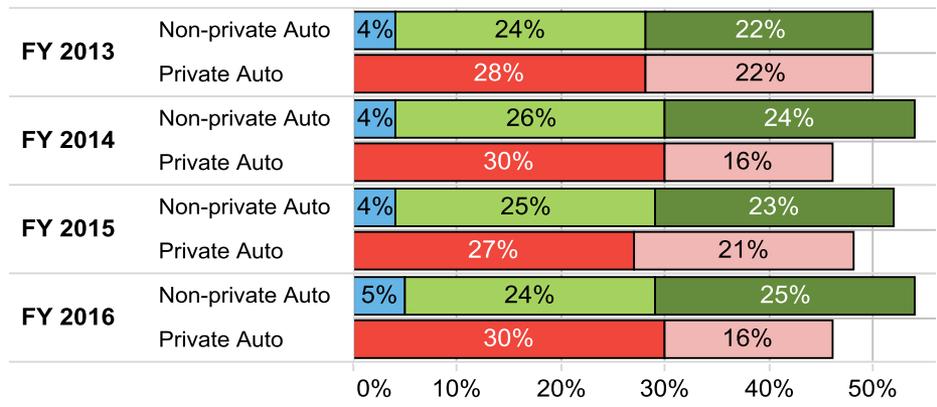
Key performance indicators continued

2.2.6 Percentage of on-time performance

2.3.1 Percentage of non-private auto mode share

		Bicycling, taxi, TNC, other	Transit	Walking
FY 2013	Non-private Auto	4%	24%	22%
	Private Auto	28%	22%	
FY 2014	Non-private Auto	4%	26%	24%
	Private Auto	30%	16%	
FY 2015	Non-private Auto	4%	25%	23%
	Private Auto	27%	21%	
FY 2016	Non-private Auto	5%	24%	25%
	Private Auto	30%	16%	

Legend:
- Bicycling, taxi, TNC, other
- Transit
- Walking
- Drive alone
- Drive with others

2.4.1 Percentage of metered hours with no rate change in SFpark pilot areas(1)
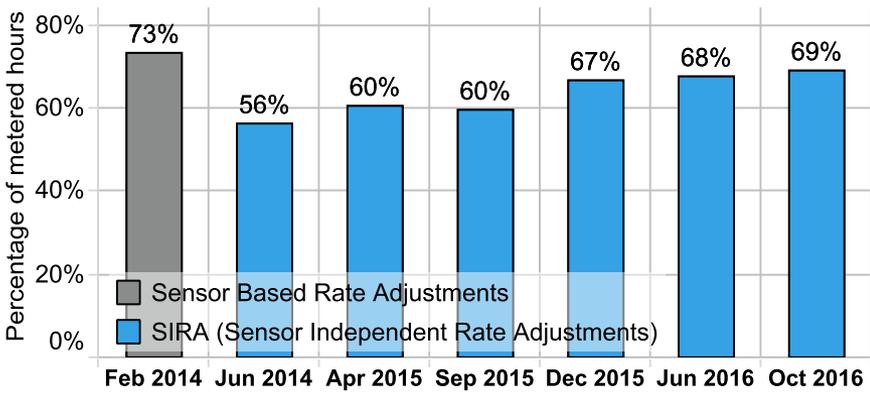
- Sensor Based Rate Adjustments
- SIRA (Sensor Independent Rate Adjustments)

Note: Reported results are subject to change as data quality improves or new data become available.

Goal 4 metrics

Create a workplace that delivers outstanding service

Objective 4.1
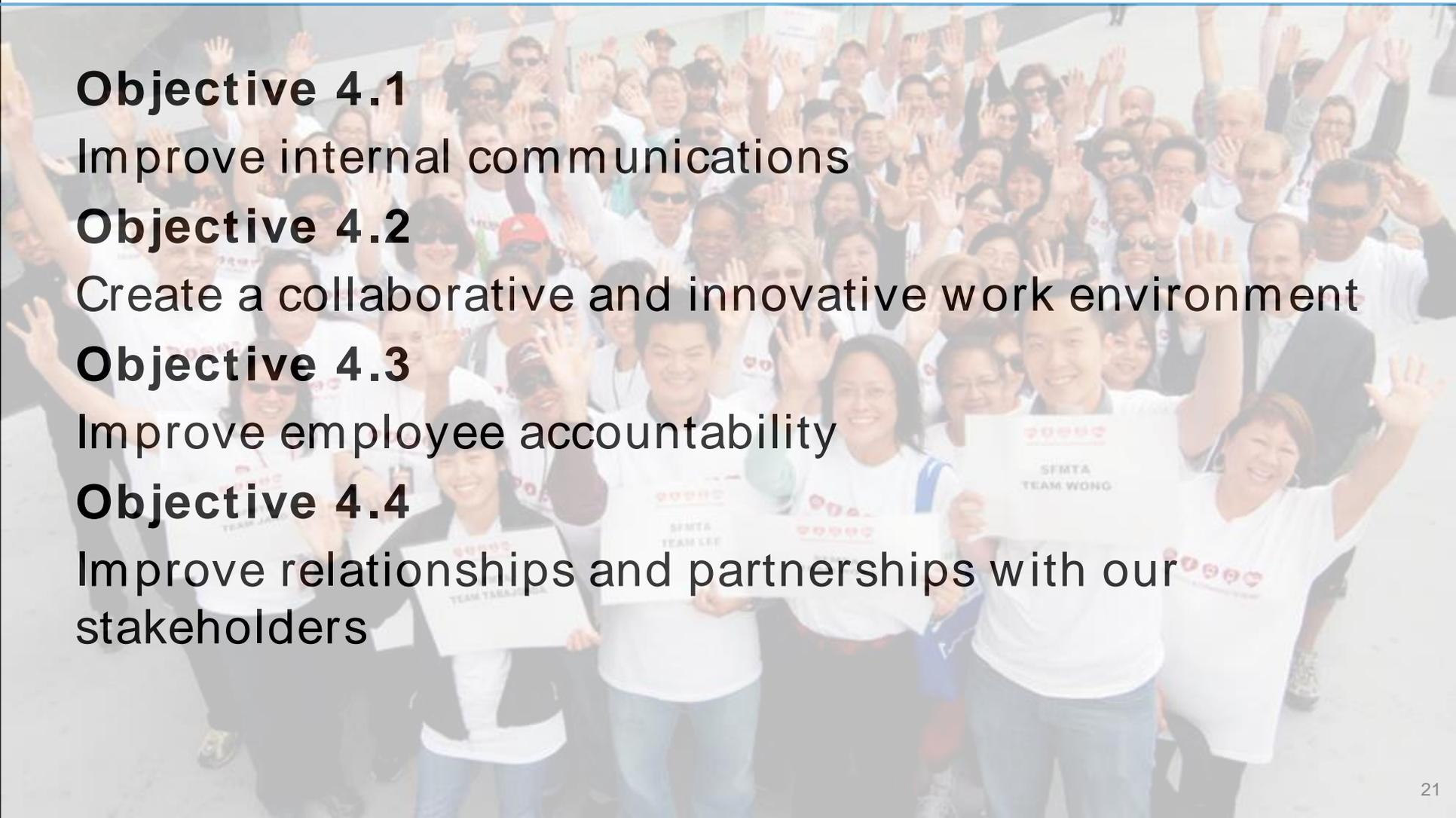
Improve internal communications

Objective 4.2

Create a collaborative and innovative work environment

Objective 4.3

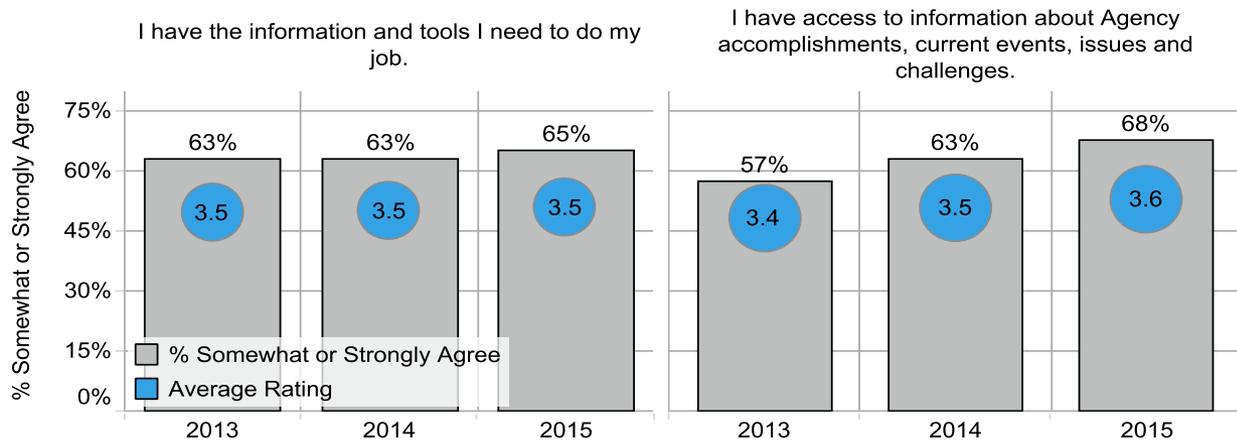Improve employee accountability

Objective 4.4

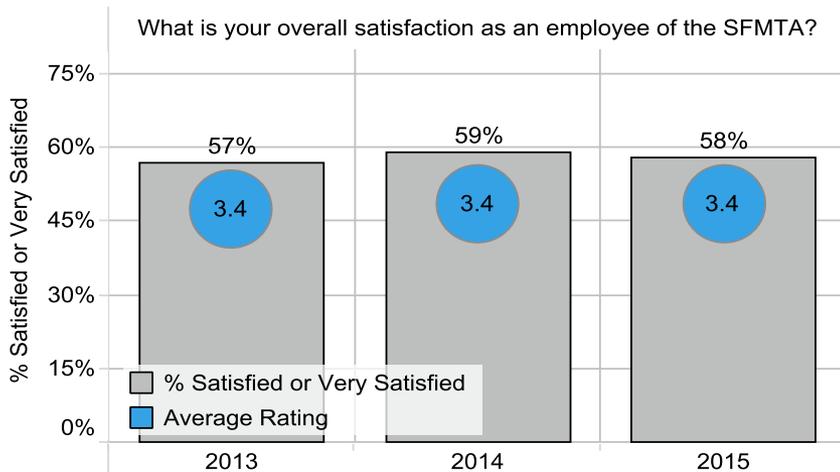Improve relationships and partnerships with our stakeholders
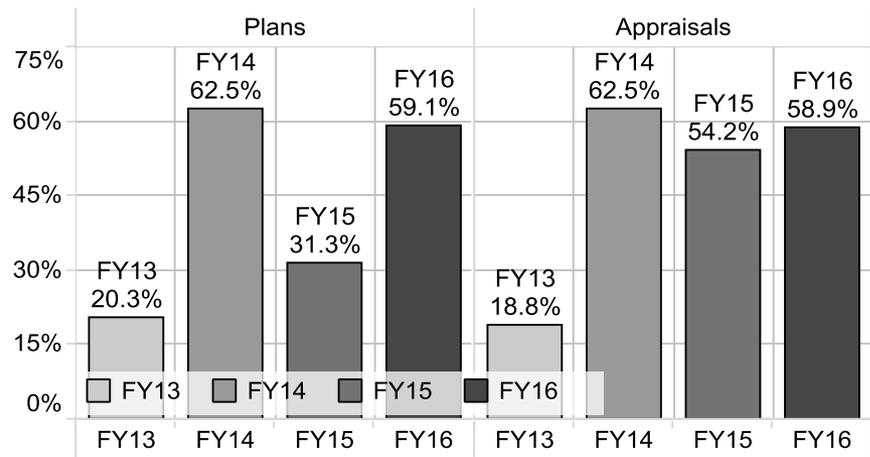
Goal 4 metrics

Key performance indicators

4.1.1 Employee Rating: Access to Agency information and tools needed to do my job

I have the information and tools I need to do my job.

- % Somewhat or Strongly Agree
- Average Rating

Year	% Somewhat or Strongly Agree	Average Rating
2013	63%	3.5
2014	63%	3.5
2015	65%	3.5

I have access to information about Agency accomplishments, current events, issues and challenges.

Year	% Somewhat or Strongly Agree	Average Rating
2013	57%	3.4
2014	63%	3.5
2015	68%	3.6

4.2.1 Employee Rating: Overall employee satisfaction

What is your overall satisfaction as an employee of the SFMTA?

Year	% Satisfied or Very Satisfied	Average Rating
2013	57%	3.4
2014	59%	3.4
2015	58%	3.4

- % Satisfied or Very Satisfied
- Average Rating

4.3.1 Percentage of employees with performance plans/appraisals by start/end of fiscal year

Plans

	FY13	FY14	FY15	FY16
Plans	20.3%	62.5%	31.3%	59.1%

Appraisals

	FY13	FY14	FY15	FY16
Appraisals	18.8%	62.5%	54.2%	58.9%

- FY13
- FY14
- FY15
- FY16

4.1.1 2016 employee survey results will be reported in January 2017.
Note: Reported results are subject to change as data quality improves or new data become available.

Goal 4 metrics

Key performance indicators *continued*

4.4.1 Stakeholder rating: satisfaction with SFMTA management of transportation in San Francisco

Rating	Percentage
Very satisfied	5.4%
Somewhat satisfied	36.9%
Neither satisfied nor dissatisfied	12.7%
Somewhat dissatisfied	26.9%
Very dissatisfied	18.1%

Note: Reported results are subject to change as data quality improves or new data become available.