



SFMTA
Municipal
Transportation
Agency

Strategic Plan Progress Report

Goal 4 Focus with Employee Survey Update

February 2016

San Francisco, California

Goal 4 focus

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



Employee Engagement Survey

2015 Update

2015 Survey Campaign

- **Survey Period:** Sep 1 – Oct 9*

*Kept open for additional 2 weeks to collect more surveys from Transit Operators

- **Participation Rate:** 1,560 responses (27%)

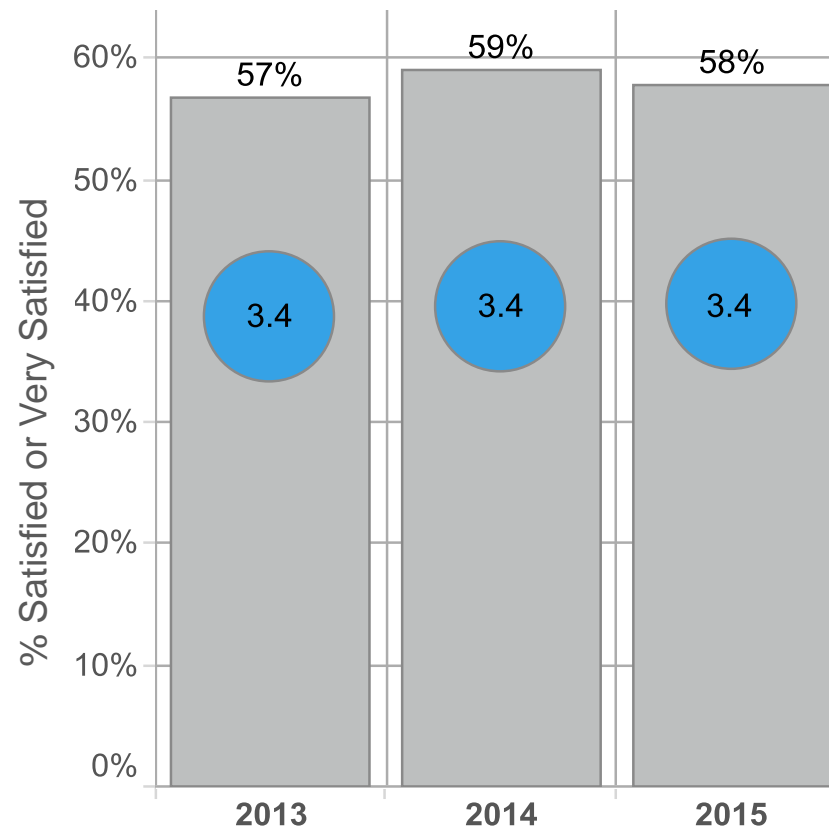
- 1,525 (30%) in 2014
- 1,667 (33%) in 2013

- **Lessons Learned:**

- Email campaign – generic URL will help improve awareness
- Paper surveys – direct mail to all frontline staff may improve participation
- Questions – classification-based questions may improve survey relevance

Overall satisfaction remains steady

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



**KPI for Objective 4.2:
Create a collaborative
and innovative work
environment**

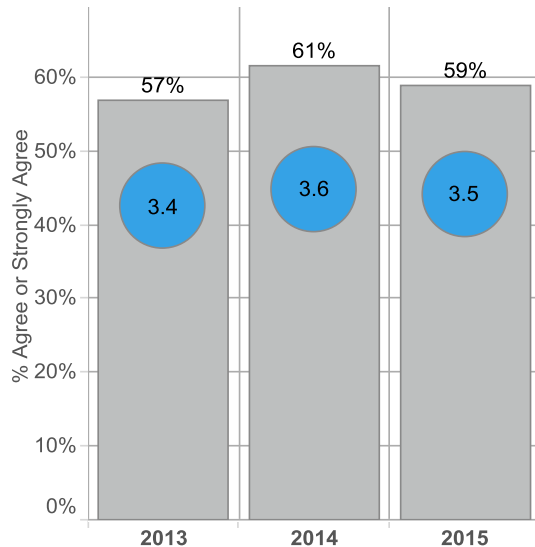


Avg. rating, scale of 1 (low) - 5 (high)

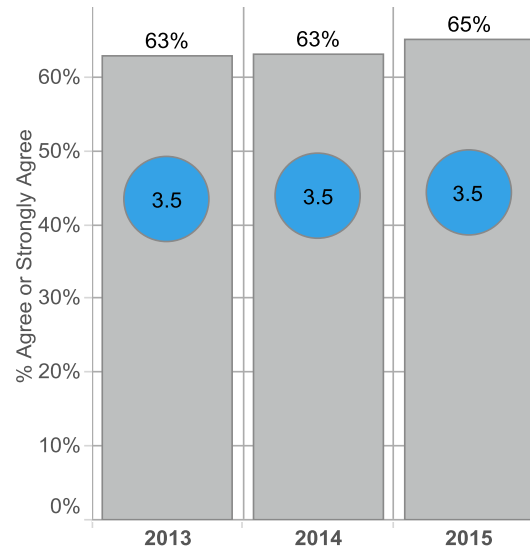
A few key metrics reveal greatest change

Agency-wide Ratings with Greatest Change, 2013-2015

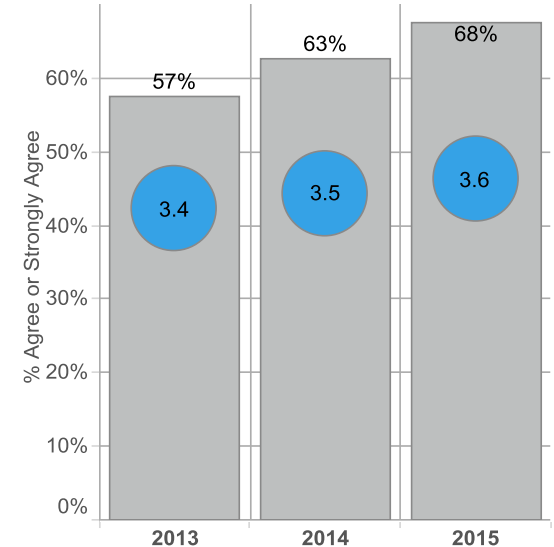
My manager/supervisor provides the support I need to do my best work



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



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



**KPIs for Objective 4.1:
Improve internal communications**

Three questions have the highest positive correlation with overall satisfaction

Rank	Question
#1	I feel like the Agency is moving in the right direction.
#2	My work gives me a feeling of personal accomplishment.
#3	I have confidence in the executive leadership of the SFMTA.

Next Steps to Improve Satisfaction

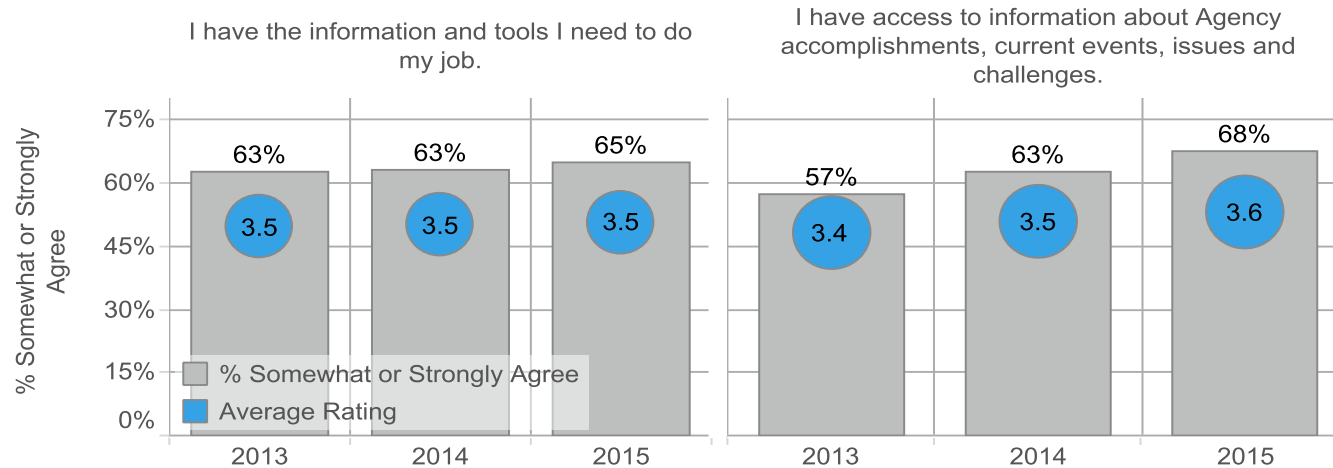
- Providing Division leaders with survey tool kits including results, comments, and analysis
- Sharing results with employee groups and engaging staff in discussions about improvement opportunities
- Identifying Division-specific initiatives to improve satisfaction
- Integrating survey findings into organizational development training and outreach
- Partnering to incorporate improvement strategies into the “Creating an Outstanding Workplace” effort

Objective 4.1

Improve internal communications

Key performance indicator

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



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

ID	Metric	2013 Avg	2014 Avg	2015 Avg
4.1.1	Employee rating: I have the info and tools I need to do my job; scale of 1 (high) to 5 (low)	3.5	3.5	3.5
4.1.1	Employee rating: I have access to info about Agency accomplishments, current events, issues and challenges.	3.4	3.5	3.6
4.1.2	Percentage of employees that complete the survey	32.9%	29.6%	27.2%
4.1.3	Employee rating: I have a clear understanding of my division's goals/objectives and how they contribute to Agency success.	3.5	3.5	3.6
4.1.4	Employee rating: I have received feedback on my work in the last 30 days.	3.2	3.1	3.1
4.1.5	Employee rating: I have noticed that communication between leadership and employees has improved.	2.9	3.0	3.0
4.1.6	Employee rating: Discussions with my supervisor about my performance are worthwhile.	3.4	3.5	3.5

¹ 2016 employee survey will be completed in September.

Objective 4.1

Improve internal communications

Key action item updates

4.1.23 Improve SFMTA intranet

The *insideSFMTA* intranet site will be upgraded to SharePoint 2016. Short term plans include creating new templates for division, section, and business unit sites. Collaboration team sites will now be implemented on-premises, rather than hosted, in SharePoint 2013. The SFMTA's SharePoint team will grow with 3 new employees to facilitate upcoming changes.

4.1.24 Develop communications vehicles that allow for improved communications with operators and frontline staff

The SFMTA received three vendor proposals for a pilot project to install programmable displays at facilities in the field. The proposals will be reviewed by the Communications team and staff anticipate selecting a vendor by the end of February. The pilot will include four locations.

Action item status

0% encountering issues

0% at risk

75% on track

0% on hold



25% completed

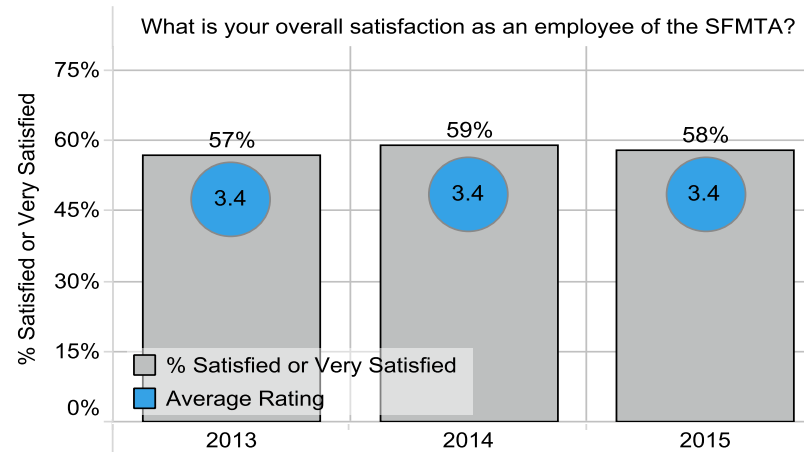


Objective 4.2

Create a collaborative and innovative work environment

Key performance indicator

4.2.1 Employee Rating: Overall employee satisfaction



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

ID	Metric	2013 Avg	2014 Avg	2015 Avg
4.2.1	Employee rating: Overall employee satisfaction; scale of 1 (low) to 5 (high)	3.4	3.4	3.4
4.2.2	Employee rating: My concerns, questions, and suggestions are welcomed and acted upon quickly and appropriately.	3.0	3.0	3.0
4.2.3	Employee rating: I find ways to resolve conflicts by working collaboratively with others.	3.9	4.0	4.0
4.2.4	Employee rating: I am encouraged to use innovative approaches to achieve goals.	3.4	3.4	3.3
4.2.5	Employee rating: Employees in my work unit share job knowledge to solve problems efficiently/effectively	3.7	3.8	3.8
4.2.6	Employee rating: I feel comfortable sharing my thoughts and opinions, even if they're different than others'.	3.6	3.7	3.6
4.2.7	Employee rating: My work gives me a feeling of personal accomplishment.	3.7	3.8	3.7

¹ 2016 employee survey will be completed in September.

Objective 4.2

Create a collaborative and innovative work environment

Key action item updates

4.2.1 Implement Culture Change Initiative

- The SFMTA has relaunched and rebranded the Culture Change Initiative as *Creating an Outstanding Workplace*. Each Executive Team Member is championing one *Creating an Outstanding Workplace* effort and will report progress monthly at an Executive Team meeting.
- CPS HR Consulting will conduct 360° performance reviews for the Executive Team and will provide individual coaching. Kick-off meeting with the Executive Team scheduled for February 22.
- Staff are currently developing a staffing plan to sustain the effort, establishing a cross-divisional steering committee that is diverse - age, gender, race/ethnicity, and classification, and establish site-specific working groups to help with implementation of *Creating an Outstanding Workplace* initiatives.

Action item status

0% encountering issues

29% at risk

71% on track

0% on hold



0% completed

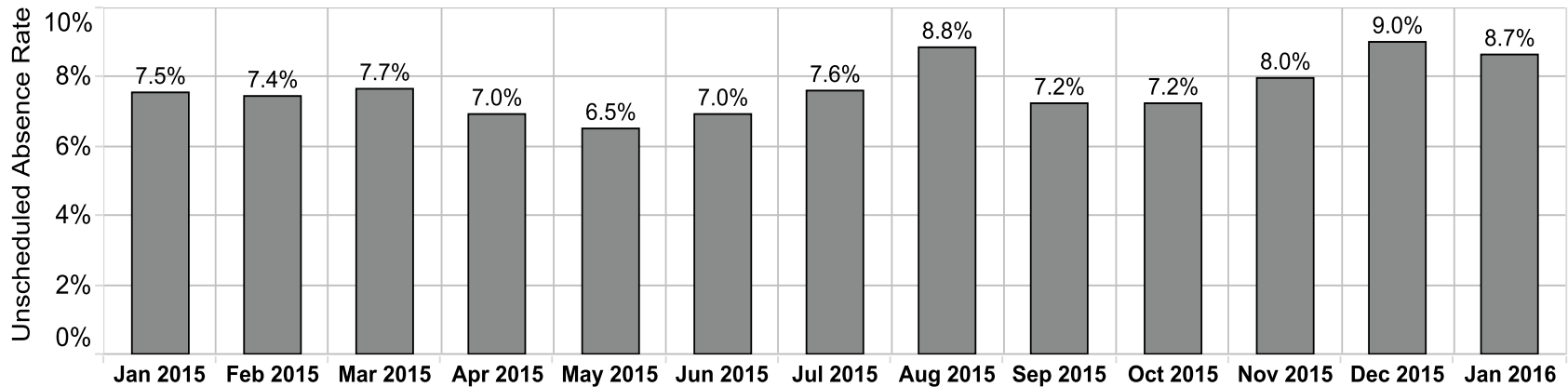


Objective 4.3

Improve employee accountability

Metric of note

4.3.3 Unscheduled absence rate by employee group (Transit operators)



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

ID	Metric	Target	FY15 Avg	FY16 Avg	Jan 2015	Dec 2015	Jan 2016
4.3.1	Percentage of employees with performance plans prepared by start of fiscal year		31.3%	59.1%			
4.3.1	Percentage of employees with annual appraisals based on their performance plans		54.2%	*			
4.3.2	Percentage of strategic plan metrics reported		92.3%	93.6%			
4.3.3	Unscheduled absence rate by employee group (Transit operators)		7.7%	8.1%	7.5%	9.0%	8.7%
4.3.4	Employee rating: My manager holds me accountable to achieve my written objectives		3.6	*			
4.3.5	Employee commendations to 311		103.8	128.3	98	157	130

*Data forthcoming: 2016 employee survey will be completed in September.

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

Objective 4.3

Improve employee accountability

Key action item updates

4.3.3 Exit interview program

The Exit Interview Program has now launched for all SFMTA divisions. The action team will continue to develop other parts of the program, including data reporting and analysis.

4.3.8 Agency-wide attendance management program

The Attendance Task Force launched an electronic return-to-work routing system in December, 2015 with Lead Dispatchers at each division. The team is collecting data in order to refine the process to improve effectiveness. A big-picture analysis on agency-wide attendance trends, which requires incorporating multiple tracking systems into one dashboard is on-going. Team members are meeting with Transit non-Operations Managers to develop a Transit-wide Attendance Toolkit & Guidelines, to be finalized in mid-FY16.

Action item status

0% encountering issues

0% at risk

88% on track

0% on hold



12% completed

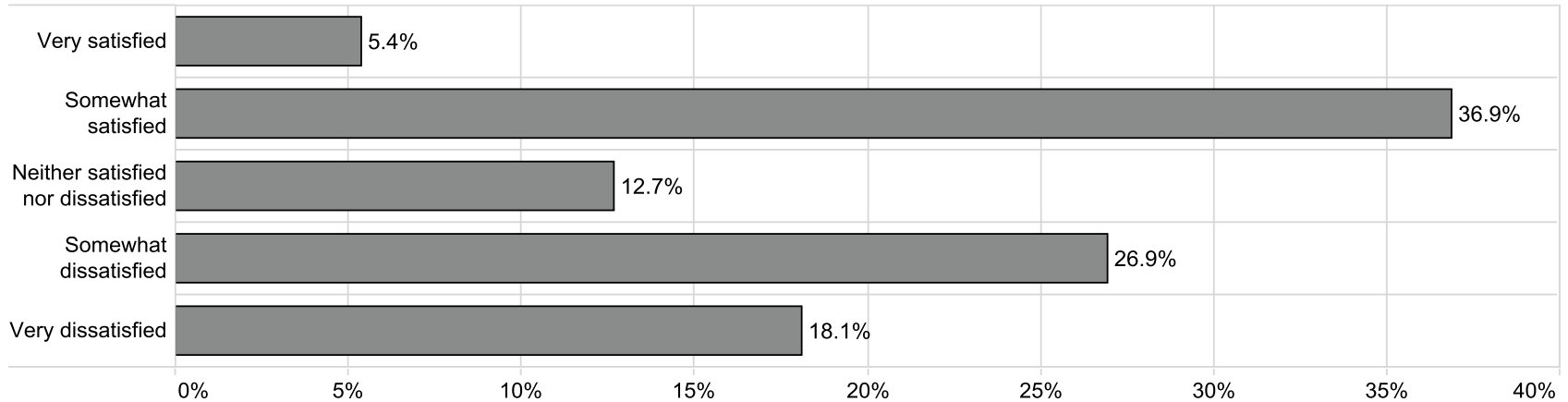


Objective 4.4

Improve relationships and partnerships with our stakeholders

Key performance indicator

4.4.1 Stakeholder rating: satisfaction with SFMTA management of transportation in San Francisco; scale of 1 (low) to 5 (high)



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

ID	Metric	FY15 Avg
4.4.1	Stakeholder rating: satisfaction with SFMTA management of transportation in San Francisco; scale of 1 (low) to 5 (high)	2.9

Objective 4.4

Improve relationships and partnerships with our stakeholders

Key action item updates

4.4.21 Public Outreach and Engagement Team Strategy (POETS)

Staff have developed and are finalizing a feedback mechanism structure to properly assess the progress of the POETS program. Staff developed a structured approach for both recognition and training programs; will review final proposal with the Executive Team in February prior to launching, and implementing via Agency POETS Peer Group. Staff are establishing a case study model for additional review and recognition component of POETS, with a divisional focus. A District Liaison component is being established to identify key stakeholders within each supervisorial district, further develop relationships and serve as a liaison to ensure communication and responsiveness.

Action item status

17% encountering issues

0% at risk

66% on track

0% on hold



17% completed



Goal 4 financials

Expenditures (FY16 as of December 2015)

EXPENDITURES	Revised Budget ⁽¹⁾	Actuals: Year to Date	Encumbrances	Total Projection for the Year ⁽²⁾	Saving/(Overage)
SFMTA Agency Wide	\$96,158,219	\$35,575,615	\$33,839,924	\$97,742,678	(\$1,584,459)
Board of Directors	\$596,049	\$259,061	\$500	\$553,534	\$42,515
Capital Programs and Construction	\$545,255	(\$3,592,823)	\$2,199,703	\$545,255	\$0
Communications	\$6,425,892	\$1,785,994	\$975,190	\$5,791,690	\$634,202
Director of Transportation	\$2,508,056	\$780,288	\$500,099	\$2,469,567	\$38,488
Finance and Information Technology	\$92,734,684	\$29,072,124	\$26,095,350	\$89,251,120	\$3,483,564
Government Affairs	\$1,108,148	\$437,983	\$215,969	\$1,144,460	(\$36,312)
Human Resources	\$34,435,841	\$13,338,735	\$6,369,300	\$37,646,294	(\$3,210,453)
Safety	\$4,907,792	\$1,192,497	\$862,127	\$5,445,783	(\$537,990)
Sustainable Streets	\$161,063,457	\$63,756,601	\$38,892,298	\$153,740,272	\$7,323,186
Transit Services	\$597,431,415	\$275,496,333	\$60,412,113	\$604,051,565	(\$6,620,150)
Taxi and Accessible Services	\$29,708,519	\$11,355,027	\$7,508,497	\$29,161,987	\$546,532
TOTAL	\$1,027,623,327	\$429,457,434	\$177,871,071	\$1,027,544,204	\$79,122

(1) Revised budget includes encumbrance and equipment carry forward of \$58.3 million..

(2) Expenditures projection is based on all encumbrance spent in FY2016.

Goal 4 financials

Revenues (FY16 as of December 2015)

REVENUE	Revised Budget	Actuals Year to Date	Total Projection for the Year	Surplus/(Deficit)
TRANSIT FARES				
Cable Car Fares	\$26,580,000	\$16,297,410	\$27,464,677	\$884,677
Cash Fares	\$81,636,000	\$42,560,215	\$82,544,820	\$908,820
Other Fares	\$4,570,000	\$2,068,710	\$4,170,408	(\$399,592)
Passes	\$88,255,000	\$44,129,272	\$88,052,460	(\$202,540)
TRANSIT FARES Total	\$201,041,000	\$105,055,606	\$202,232,364	\$1,191,364
PARKING FEES & FINES				
General Fund Baseline Transfer	\$71,800,000	\$35,900,000	\$71,800,000	\$0
Citations and Fines	\$97,040,000	\$51,362,659	\$101,599,272	\$4,559,272
Garage Revenue	\$64,464,191	\$33,266,902	\$64,998,902	\$534,711
Meter Revenue	\$45,337,319	\$30,211,318	\$56,670,404	\$11,333,085
Permit Revenue	\$13,420,000	\$6,753,714	\$14,732,572	\$1,312,572
PARKING FEES & FINES Total	\$292,061,510	\$157,494,592	\$309,801,150	\$17,739,640
Operating Grants	\$132,080,682	\$41,147,372	\$136,419,524	\$4,338,842
Taxi Service	\$14,310,000	\$2,304,447	\$4,608,971	(\$9,701,029)
Other Revenues	\$28,536,000	\$18,002,843	\$30,240,389	\$1,704,389
General Fund Transfer ⁽²⁾	\$272,000,000	\$136,000,000	\$277,000,000	\$5,000,000
Fund Balance for Current Year Budget	\$20,009,965	\$20,009,965	\$20,009,965	\$0
Transfer from Non-operating Fund	\$9,459,969	\$9,459,969	\$9,459,969	\$0
Fund Balance for Prior Year Encumbrance Carry Forward	\$58,257,733	\$58,257,733	\$58,257,733	\$0
TOTAL	\$1,027,756,858	\$547,732,527	\$1,048,030,064	\$20,273,206

Goal 4 financials

Overtime Report (FY16 as of December 2015)

FUND/DIVISION	ANNUAL REVISED BUDGET	ACTUALS 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	\$11,740,868	\$12,361,667	\$24,102,535	(\$515,915)
Transit Vehicle Maintenance	\$6,468,689	\$5,788,309	\$6,303,261	\$12,091,570	(\$5,622,881)
Transit – All Others	\$4,664,203	\$5,140,211	\$6,291,765	\$11,431,976	(\$6,767,773)
Subtotal Transit Services Division	\$34,719,512	\$22,669,388	\$24,956,693	\$47,626,081	(\$12,906,569)
SUSTAINABLE STREETS DIVISION					
Parking Control Officers	\$994,984	\$471,911	\$0	\$471,911	\$523,073
Sustainable Streets – All Others	\$794,714	\$361,909	(\$11,630)	\$350,279	\$444,435
Subtotal Sustainable Streets Division	\$1,789,698	\$833,820	(\$11,630)	\$822,190	\$967,508
SFMTA AGENCY WIDE	\$0	\$0	\$0	\$0	\$0
ALL OTHER DIVISIONS	\$889,774	\$618,261	\$692,394	\$1,310,656	(\$420,882)
TOTAL OPERATING FUND	\$37,398,984	\$24,121,469	\$25,637,457	\$49,758,927	(\$12,359,943)
NON OPERATING FUND					
Capital Programs & Construction	\$0	\$1,381,470	\$1,561,173	\$2,942,643	(\$2,942,643)
Sustainable Streets Engineering Programs	\$0	\$434,812	\$491,372	\$926,184	(\$926,184)
Total Non-Operating Fund	\$0	\$1,816,281	\$2,052,545	\$3,868,827	(\$3,868,827)
TOTAL	\$37,398,984	\$25,937,751	\$27,690,003	\$53,627,753	(\$16,228,769)

⁽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 \$1,682,000 as of December 2015.

Goal 1 metrics

Create a safer transportation experience for everyone

Objective 1.1

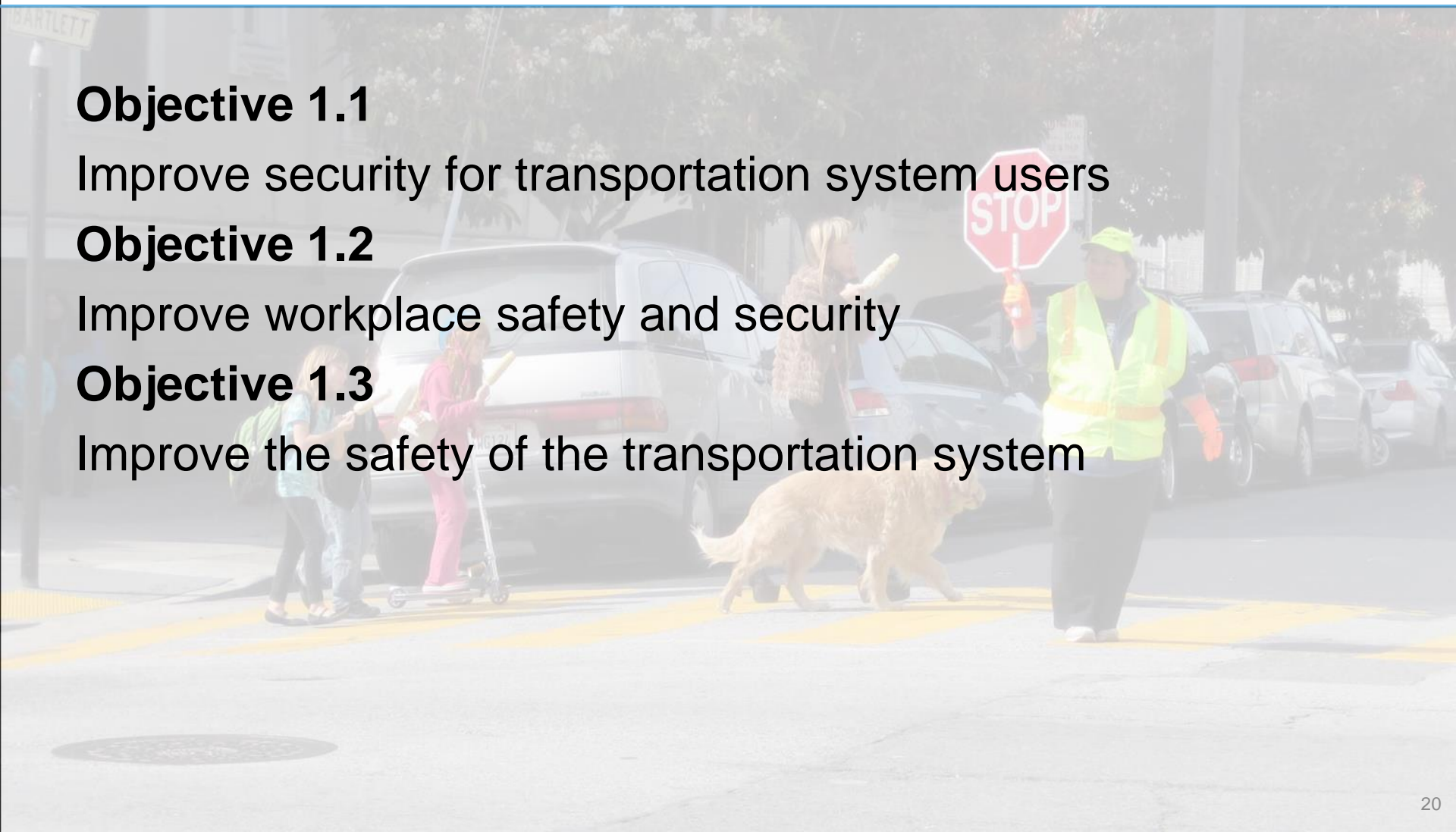
Improve security for transportation system users

Objective 1.2

Improve workplace safety and security

Objective 1.3

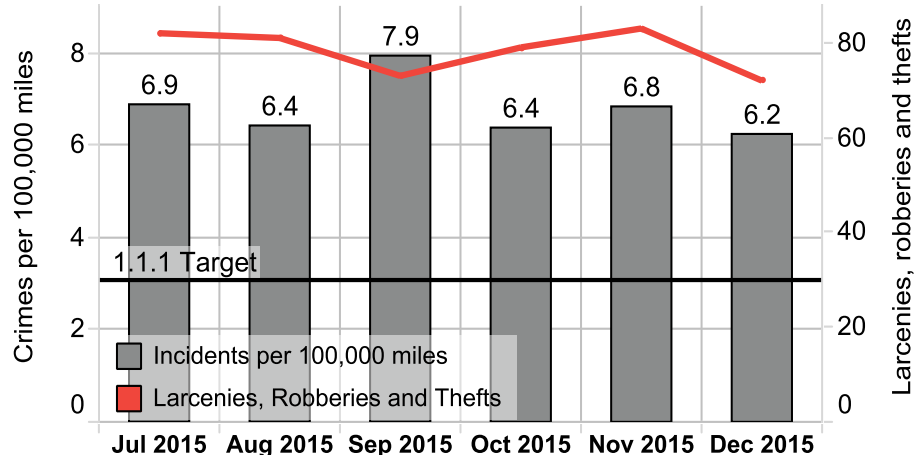
Improve the safety of the transportation system



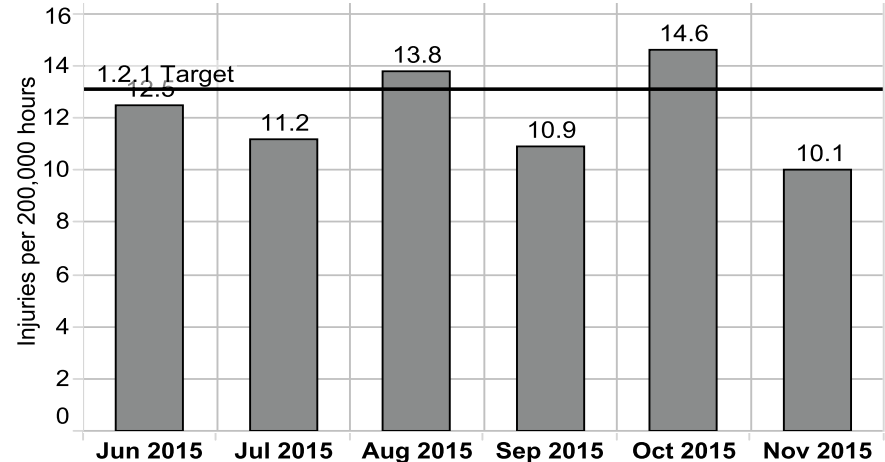
Goal 1 metrics

Key performance indicators

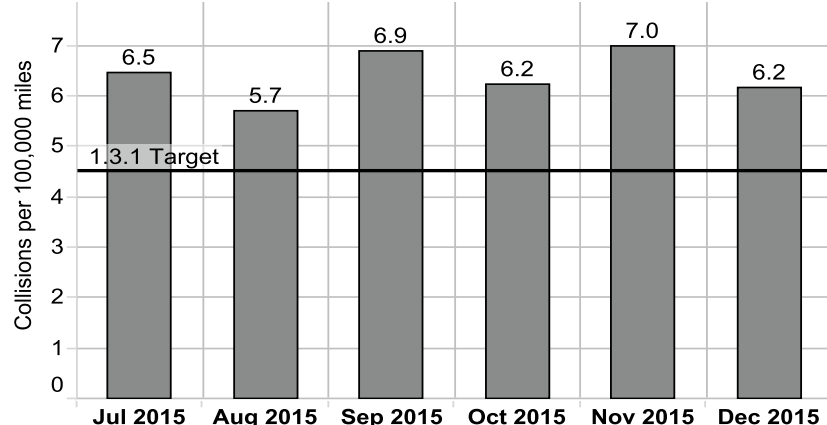
1.1.1 SFPD incidents per 100,000 miles



1.2.1 Workplace injuries per 200,000 hours



1.3.1 Collisions per 100,000 miles



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

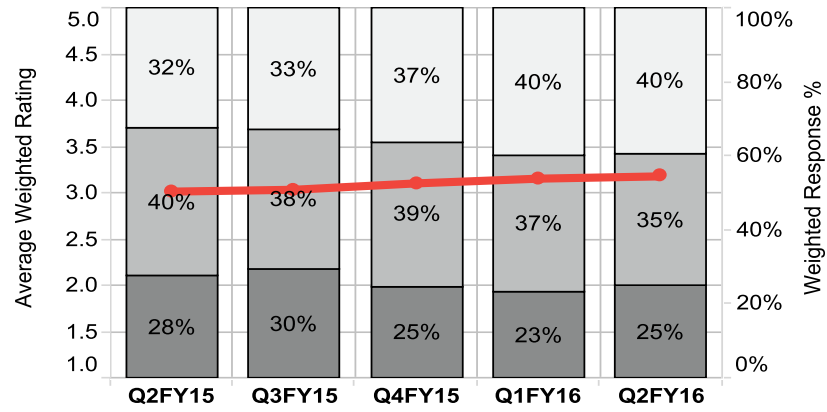
Objective 2.4

Improve parking utilization and manage parking demand

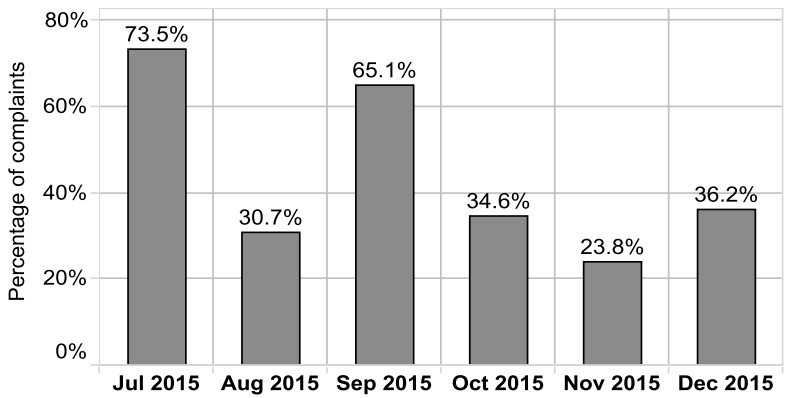
Goal 2 metrics

Key performance indicators

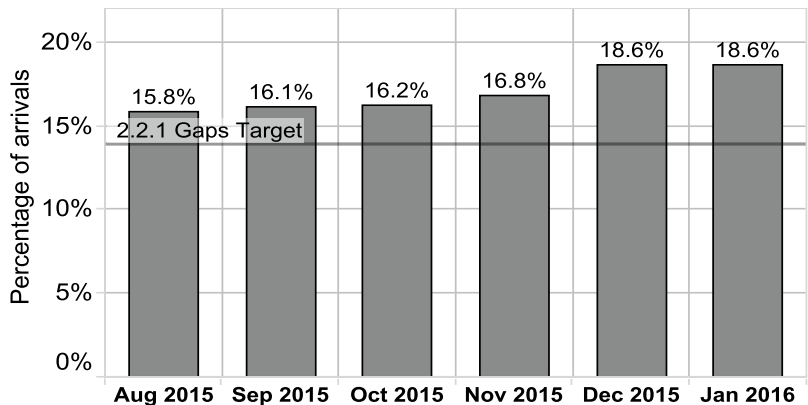
2.1.1 Customer rating: Overall satisfaction with transit services; scale of 1 (low) to 5 (high)



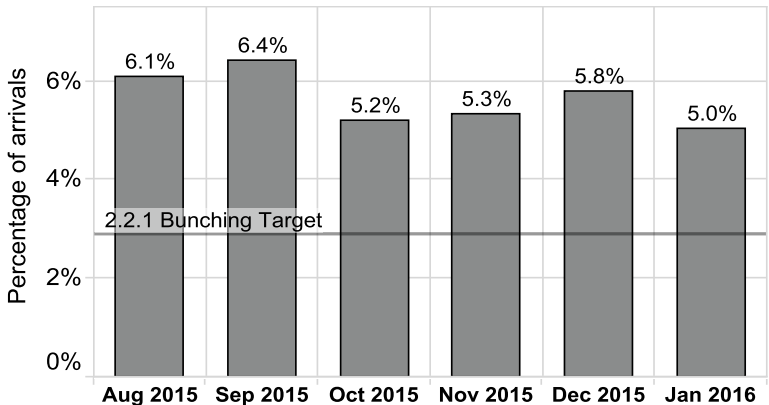
2.1.7 Percentage of actionable Muni related 311 complaints addressed within 28 business days



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)



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.

²Effective April 2015, the Muni Rapid Network is defined as routes/lines J, K, L, M, N, 5R, 7R, 9R, 14R, 28R, and 38R. This report reflects the updated Rapid Network.

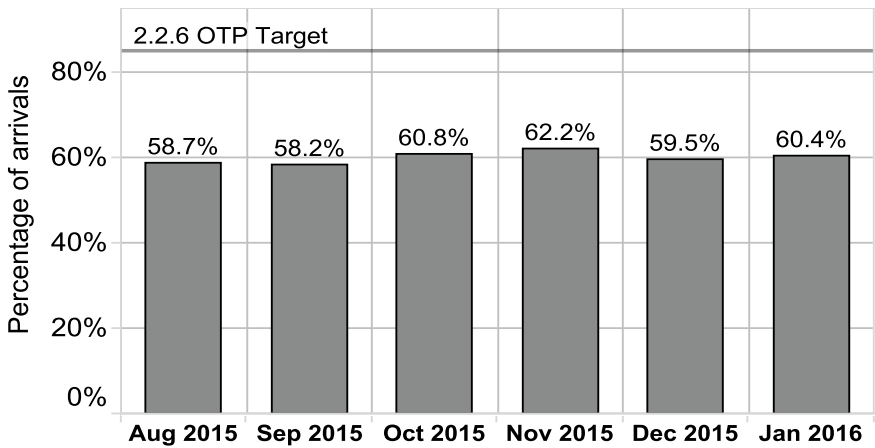
³Due to a new automated reporting process that accurately reflects the current Transit Operator MOU-based performance standard for timeliness of complaint resolution, the reported percentage of Muni related 311 complaints resolved within 28 business days slightly differs from previously published figures.

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

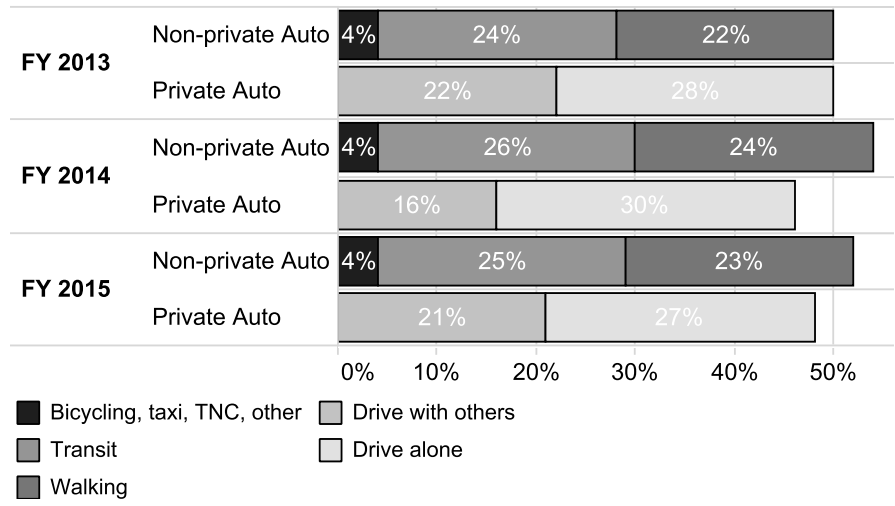
Goal 2 metrics

Key performance indicators **continued**

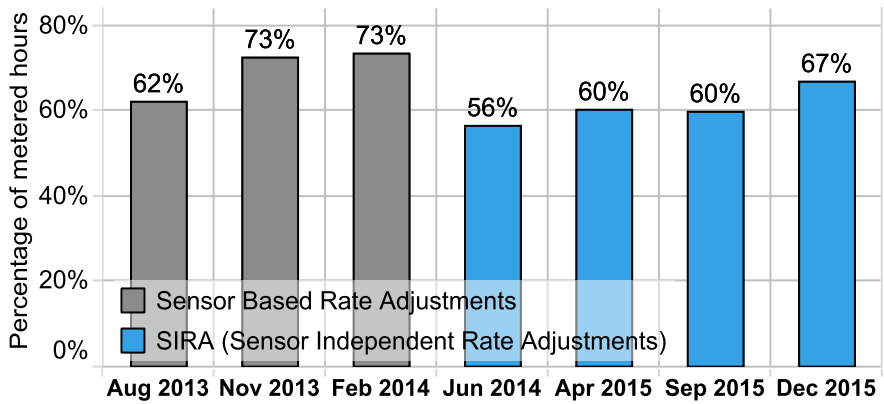
2.2.6 Percentage of on-time performance



2.3.1 Percentage of non-private auto mode share



2.4.1 Percentage of metered hours with no rate change in SFpark pilot areas⁽¹⁾



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

Goal 3 metrics

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

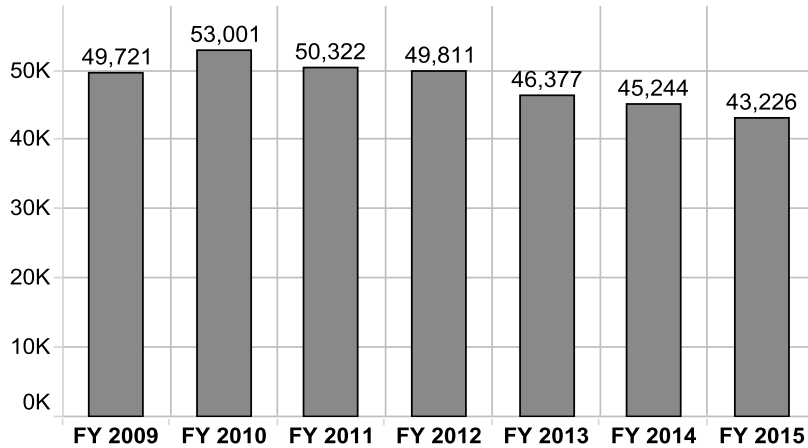
Objective 3.5

Reduce capital and operating structural deficits

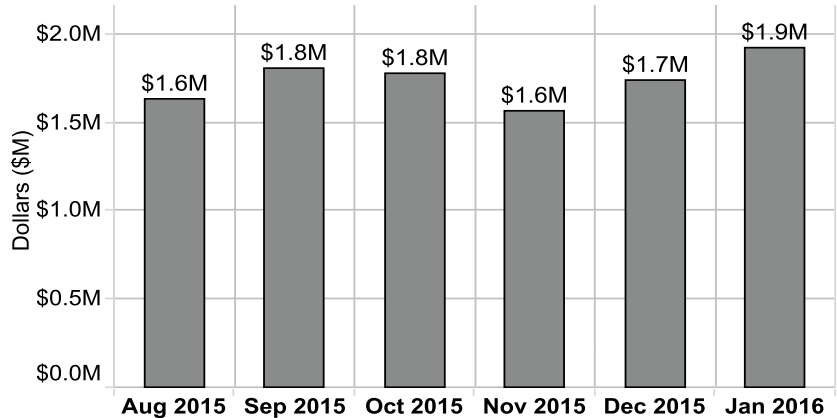
Goal 3 metrics

Key performance indicators

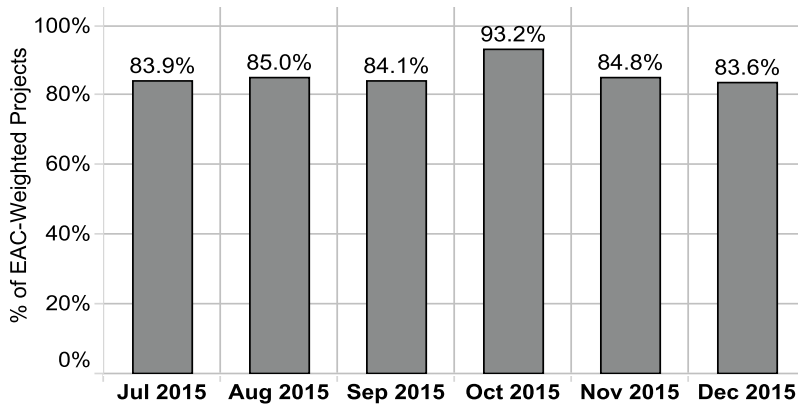
3.1.1 SFMTA carbon footprint (metric tons CO2e)



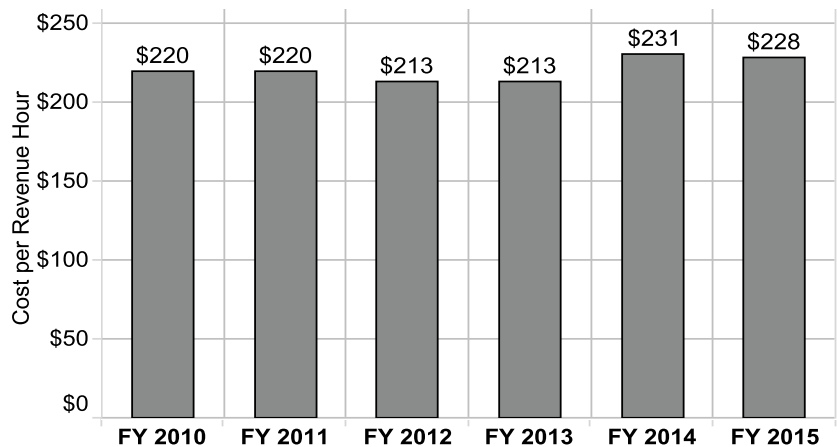
3.2.1 Estimated economic impact of Muni service delays (Monthly \$M)



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



3.4.1 Transit cost per revenue hour

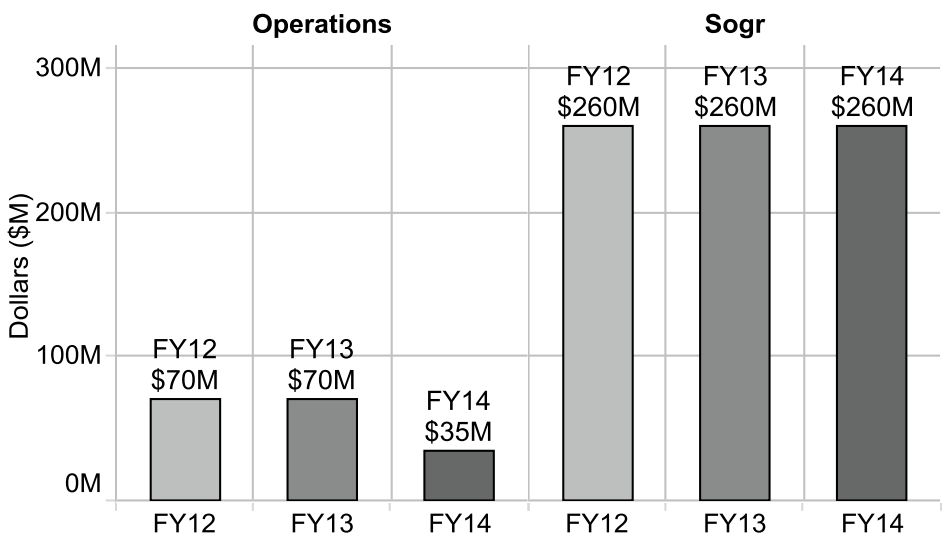


¹FY14 figures are based on preliminary unaudited financials. Figures are adjusted for inflation to reflect FY15 dollars. Note: Reported results are subject to change as data quality improves or new data become available.

Goal 3 metrics

Key performance indicators **continued**

3.5.1 Operating and capital structural deficit



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

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