



SFMTA
Municipal
Transportation
Agency

Strategic Plan Progress Report

Goal 3 Focus

June 2014

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

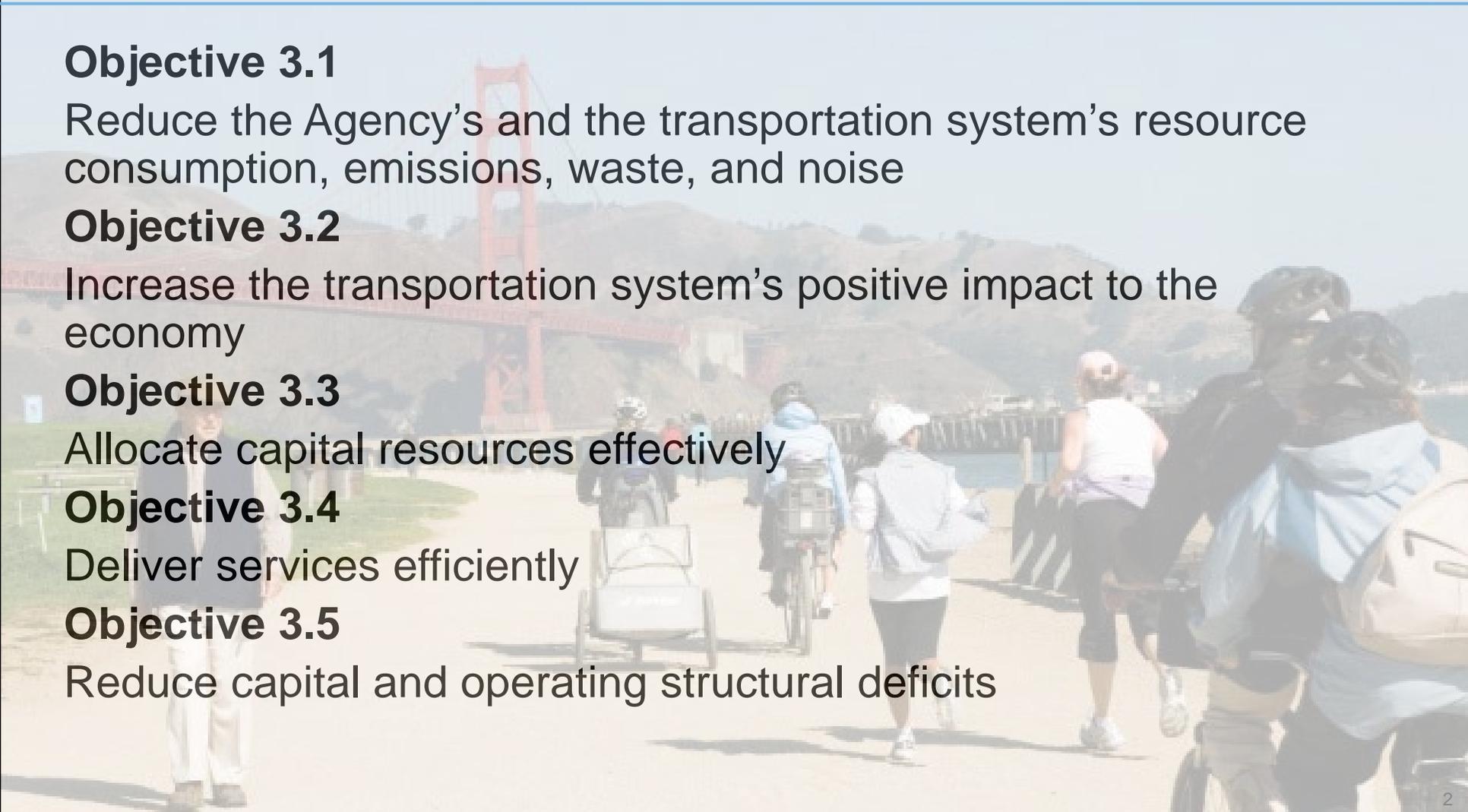
Allocate capital resources effectively

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 Metric tons of CO₂e for the transportation system

2,266,322
(2010)

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

ID	Metric	Target	FY13 Avg	FY14 Avg	Nov 2012	Oct 2013	Nov 2013
3.1.1	Metric tons of CO ₂ e for the transportation system	1,515,000	2,266,322 (2010)				
3.1.2	% of SFMTA non-revenue and taxi fleet that is alternative fuel/zero emissions		94% (taxi)				
3.1.3	% biodiesel to diesel used by SFMTA		19.3%				
3.1.4	Number of electric vehicle charging stations		31				
3.1.5	Citywide gasoline consumption rate		149,156,104 (2009)				
3.1.6	Agency electricity consumption (kWh)		122,809,359				
3.1.6	Agency gas consumption (therms)		415,308				
3.1.6	Agency water consumption (gallons)		20,116,592				
3.1.7	Agency compost production (tons)		14 (CY09)				
3.1.7	Agency recycling production (tons)		535 (CY09)				
3.1.7	Agency waste production (tons)		593 (CY09)				

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

Objective 3.1 action items

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

Key action item updates

3.1.1 Install EV Chargers in SFMTA Garages

Installed EV Chargers – over 80% in use

3.1.4 Develop citywide fuel contract

New contract in place reducing fuel costs by 10%

3.1.6 Improve energy efficiency of SFMTA facilities

Building energy use down by over 5 percent for electricity and 16 percent for natural gas

3.1.10 Reduce Taxi Fleet emissions

Applied for alternative fuel vehicle grant

Action item status

0% encountering issues

40% at risk

50% on track

0% on hold



10% completed



Objective 3.1 other key updates

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

- **Project achievements**

- Installed EV Chargers in SFMTA garages
- Developed new fuel contract
- Reduced building energy consumption

- **Forthcoming developments**

- Updating Climate Action Strategy
- Developing efficiencies to further reduce energy use
- Procuring low-carbon vehicles for PCOs and service and passenger vehicles

- **Challenges**

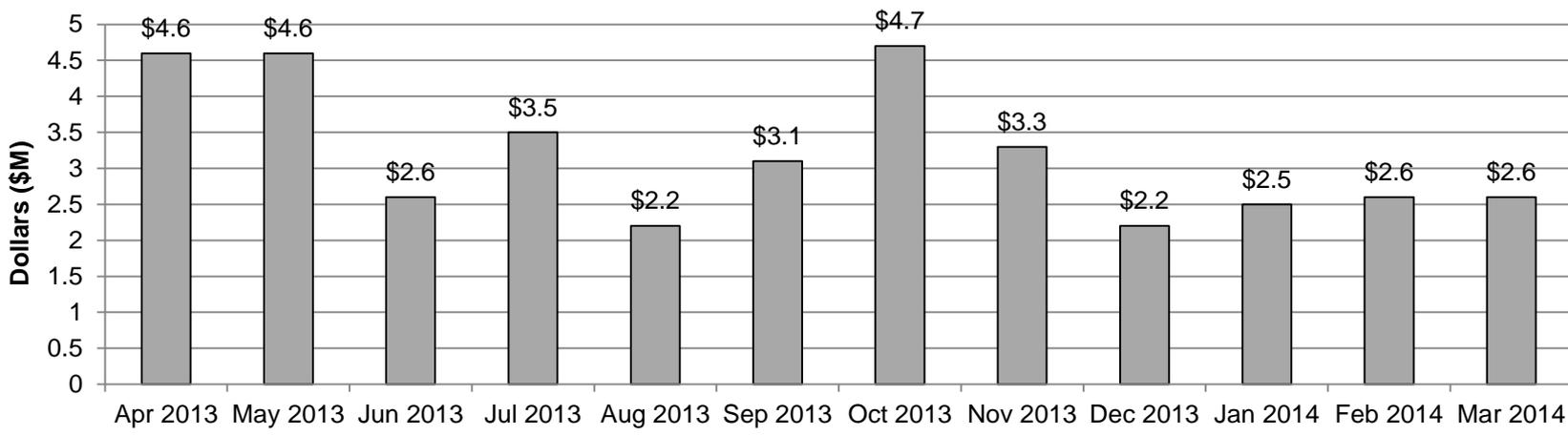
- Additional quality control needed for fuel contract
- PCO electric vehicles currently on market have reliability issues
- Single gate-keeper for vehicle procurement data needed

Objective 3.2

Increase the transportation system's positive impact to the economy

Key performance indicator

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



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

ID	Metric	Target	FY13 Avg	FY14 Avg	May 2013	Apr 2014	May 2014
3.2.1	Estimated economic impact of Muni service delays (Monthly \$M)		\$3.7	\$3.0	\$4.6	*	*

*Data forthcoming.
 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

3.2.3 Develop and implement policies for private shuttle loading/unloading to increase mode share

CEQA lawsuit filed against SFMTA, other parties; Pilot network drafted; GPS reporting requirements, permitting, billing, other business processes being finalized; On-going responses to inquiries and complaints

3.2.5 Develop co-branding and merchandising opportunities with SF businesses to increase mode share and revenues

Interviewing for Communications Marketing Manager in June - will be tasked with the implementation and completion of the Merchandising Program

3.2.6 Develop and implement local business and workforce opportunities in conjunction with our projects and programs

Chief of Staff's office engaging with other transit agencies to develop pathways to employment within the community

Action item status

0% encountering issues

25% at risk

50% on track

25% on hold

★ 0% completed ★

Objective 3.2 other key updates

Increase the transportation system's positive impact to the economy

- **Project achievements**

- Employer Shuttle Pilot Program approved by SFMTA Board and Board of Supervisors
- Outreach across agencies and organizations to educate regarding Public Outreach and Engagement Team Strategy (POETS)

- **Forthcoming developments**

- Official Announcement/Launch of POETS this summer
- Launch of SFMTA Employer Shuttle Pilot Program
- Initiate development of SFMTA workforce development plan

- **Challenges**

- CEQA Lawsuit regarding Employer Shuttle Program
- Clearly identify owner for workforce development plan

Objective 3.3

Allocate capital resources effectively

Key performance indicator

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



**Measure in
development**

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

ID	Metric	Target	FY13 Avg	FY14 Avg	May 2013	Apr 2014	May 2014
3.3.1	Percentage of all capital projects delivered on-budget by phase	Results reporting to begin in FY14.					
3.3.2	Percentage of all capital projects delivered on-time by phase	Results reporting to begin in FY14.					

Objective 3.3 action items

Allocate capital resources effectively

Key action item updates

3.3.6 Establish Pre-Development phase to determine complete scope prior to CER

Reviewing current project integration procedures and ensuring they are a regular part of project initiation

3.3.7 Develop project management processes to track and keep on track the scope, schedule, and budget of all capital projects

Development of draft Project Management Standard Operating Procedures manual is underway; establishing standard definitions for CIP Estimate / Baseline / Approved budgets and schedules

3.3.11 Prioritize and assign Communications staff to all SFMTA projects to oversee outreach

Initiated a Public Outreach and Engagement Team Strategy (POETS) to help define a five-step approach that includes analysis of current practices & pain points, best practices, recommendations, implementation and improvement

3.3.13 Review project portfolio and propose corrective action(s) for projects exceeding baseline budget and schedule

Refined performance dashboards and continued importing Sustainable Streets Division's portfolio into EcoSys software; Continued monthly workshops with Capital Projects & Construction's PMs to review project portfolios, identify areas of concern, and implement corrective actions required

Action item status

0% encountering issues

8% at risk

46% on track

0% on hold

★ 46% completed ★

Objective 3.3 other key updates

Allocate capital resources effectively

- **Key achievements**

- Finalized Complete Streets Committee (CSC) member selection
- Established a Project Delivery Improvement working group to identify and create common language, operating procedures, and institutional support for all Project Delivery functions within the SFMTA
- Small Project Delivery Workshop conducted by Livable Streets to discuss, in an open forum, issues that hamper SFMTA from delivering small projects efficiently

- **Forthcoming developments**

- Initiate first training sessions for the Agency's new electronic budget & funding revision tool and paperless approval routing.
- Continue building five-year CIP in EcoSys and initiate scope of work with consultant to design, develop, and implement Fund Programming functionality

- **Challenges**

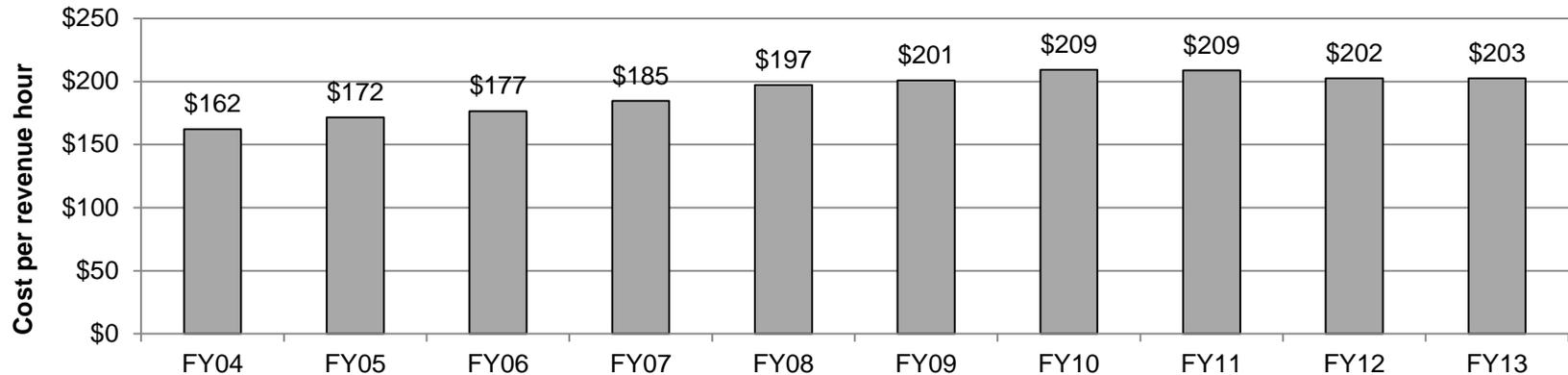
- Supporting and maintaining SFMTA's new Capital Program Controls System with limited Capital Controls staff
- Documenting Agency-wide standard operating procedures and providing comprehensive training to new and current employees

Objective 3.4

Deliver services efficiently

Key performance indicator

3.4.1 Average annual transit cost per revenue hour



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

ID	Metric	Target	FY13 Avg	FY14 Avg	May 2013	Apr 2014	May 2014
3.4.1	Average annual transit cost per revenue hour	\$192	\$202.67 ¹				
3.4.2	Passengers per revenue hour for buses		67				
3.4.3	Cost per unlinked trip		\$2.91 ¹				
3.4.4	Pay hours: platform hours ratio		1.12	1.11	1.11	1.12	1.12
3.4.5	Farebox recovery ratio		34% ¹				

¹Based on preliminary unaudited financials.

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

3.4.1 & 3.4.2 Evaluate and implement schedule deployment efficiencies & Identify incremental opportunities to shift resources from underutilized routes to overcrowded routes and increase schedule efficiency

Scarcity of part-time operators is limiting schedule efficiencies. Moving forward, hiring both part time and full time operators to maximize service hours and effectiveness. Shifting more Geary buses to the 38L Geary Limited line starting June 7 to address crowding. Planning to implement first service increase in October 2014 with a focus on reducing overcrowded routes like the 28 19th Avenue and 44 O'Shaughnessy.

3.4.8 Assess number of vehicles needed to reduce fleet age and introduce regular replacement schedule

112 new buses currently operational and an RFP is out to replace Neoplan fleet. First articulated trolley coaches to arrive by end of 2014 and articulated motor coaches to arrive shortly thereafter. RFP for light rail replacement and expansion to be awarded this summer. Full replacement funded and mid-life rehabilitations being incorporated into the capital budget for all vehicles.

Action item status

0% encountering issues

5% at risk

82% on track

0% on hold

★ 14% completed ★

Objective 3.4 other key updates

Deliver services efficiently

- **Project achievements**

- Major progress on fleet replacement and rehabilitation
- Transit has reorganized internal support shops
- Transit and SSD Paint Shops will be combined starting July 1
- Shifting resources from the 38 Local to 38 Limited on June 7
- Continual review and upgrading of bus and rail maintenance techniques and practices
- Eleven focused rehabilitation programs on rail including on-going Breda rehabilitation

- **Forthcoming developments**

- First service improvements and expansions scheduled for October 2014
- New articulated trolley coaches will start arriving by end of 2014
- New articulated motor coaches will start arriving in early 2015
- Award of LRV replacement and expansion contract
- Completion of Neoplan rehabilitation program this summer
- Mid-life rehabilitation for Orion buses (86 vehicles)

- **Challenges**

- Operator availability limits our ability to maximize part time operators and reduce overtime
- On-going issues related to sick leave
- Older fleet hinders service performance

Goal 3 financials

Expenditures (FY14 as of April 2014)

EXPENDITURES	Revised Budget ⁽¹⁾	Actuals: Year to Date	Encumbrances	Total Projection for the Year ⁽²⁾	Saving/(Overage)
SFMTA Agency Wide	\$88,814,116	\$54,770,241	\$23,240,618	\$86,398,894	\$2,415,222
Board of Directors	\$753,855	\$430,655	\$4,865	\$525,302	\$228,553
Capital Programs and Construction	\$549,776	(\$5,950,229)	\$1,597,479	\$549,776	\$0
Communications	\$4,242,321	\$2,623,748	\$201,708	\$4,161,332	\$80,988
Director of Transportation	\$1,788,046	\$1,021,901	\$197,120	\$1,610,426	\$177,620
Finance and Information Technology	\$73,628,196	\$51,162,077	\$12,886,092	\$73,102,384	\$525,812
Government Affairs	\$683,204	\$436,224	\$140,890	\$672,949	\$10,255
Human Resources	\$28,017,155	\$19,324,204	\$4,345,459	\$27,371,051	\$646,104
Safety	\$5,151,056	\$2,651,653	\$192,610	\$4,247,823	\$903,233
Sustainable Streets ⁽³⁾	\$162,279,275	\$107,093,773	\$20,340,089	\$148,207,221	\$14,072,054
Transit Services ⁽³⁾	\$529,742,617	\$415,686,631	\$49,477,260	\$549,873,917	(\$20,131,300)
Taxi and Accessible Services	\$28,422,321	\$16,611,645	\$9,620,150	\$27,317,319	\$1,105,001
TOTAL	\$924,071,938	\$665,862,523	\$122,244,340	\$924,038,395	\$33,543

Note:

(1) The revised budget includes supplemental for the 2 non-profit garages, 5th & Mission and Ellis O'Farrell, whose ownership is now with SFMTA.

(2) Expenditures projection is based on all encumbrance spent in FY2014, without carry forward to next fiscal year.

Goal 3 financials

Revenues (FY14 as of April 2014)

REVENUE	Revised Budget ⁽¹⁾	Actuals Year to Date	Total Projection for the Year	Surplus/(Deficit)
TRANSIT FARES				
Cable Car Fares	\$25,303,000	\$23,125,879	\$27,224,787	\$1,921,787
Cash Fares	\$72,520,900	\$69,536,537	\$85,249,236	\$12,728,336
Other Fares	\$5,968,200	\$5,524,785	\$6,849,695	\$881,495
Passes	\$92,612,434	\$79,412,121	\$92,612,434	\$0
TRANSIT FARES Total	\$196,404,534	\$177,599,322	\$211,936,151	\$15,531,617
PARKING FEES & FINES				
General Fund Baseline Transfer	\$66,600,000	\$65,968,000	\$66,600,000	\$0
Citations and Fines	\$102,441,800	\$87,340,869	\$102,441,800	\$0
Garage Revenue	\$61,190,575	\$56,021,255	\$64,636,247	\$3,445,672
Meter Revenue	\$46,188,400	\$49,582,371	\$56,188,400	\$10,000,000
Permit Revenue	\$12,631,900	\$11,554,731	\$12,631,900	\$0
PARKING FEES & FINES Total	\$289,052,675	\$270,467,227	\$302,498,347	\$13,445,672
Operating Grants	\$115,702,102	\$96,063,506	\$131,302,190	\$15,600,088
Taxi Service	\$10,225,913	\$12,349,163	\$13,802,755	\$3,576,842
Other Revenues	\$23,991,672	\$25,258,984	\$26,792,963	\$2,801,291
General Fund Transfer	\$232,000,000	\$232,000,000	\$236,200,000	\$4,200,000
Prior Year Fund Balance Carry Forward	\$59,895,279	\$59,895,279	\$59,895,279	\$0
TOTAL	\$927,272,175	\$873,633,480	\$982,427,685	\$55,155,510

Note:

(1) The revised budget includes supplemental for the 2 non-profit garages, 5th & Mission and Ellis O'Farrell, whose ownership is now with SFMTA.

Goal 3 financials

Overtime Report (FY14 as of April 2014)

FUND/DIVISION	ANNUAL REVISED BUDGET	ACTUALS FISCAL YEAR TO DATE*	PROJECTION FOR REMAINING MONTHS **	END OF YEAR PROJECTION	SURPLUS (DEFICIT)
OPERATING FUND					
TRANSIT SERVICES DIVISION					
Transit Operators	\$23,151,569	\$21,889,716	\$4,807,554	\$26,697,270	(\$3,545,701)
Transit Vehicle Maintenance	\$6,786,456	\$9,336,655	\$2,050,574	\$11,387,229	(\$4,600,773)
Transit – All Others	\$4,516,632	\$8,755,751	\$1,922,992	\$10,678,744	(\$6,162,112)
Subtotal Transit Services Division	\$34,454,657	\$39,982,123	\$8,781,120	\$48,763,243	(\$14,308,586)
SUSTAINABLE STREETS DIVISION					
Parking Control Officers	\$928,043	\$1,282,159	\$281,596	\$1,563,754	(\$635,711)
Sustainable Streets – All Others	\$762,576	\$525,317	\$115,373	\$640,690	\$121,886
Subtotal Sustainable Streets Division	\$1,690,619	\$1,807,476	\$396,969	\$2,204,445	(\$513,826)
SFMTA AGENCY WIDE***	\$0	\$260,275	\$0	\$260,275	(\$260,275)
ALL OTHER DIVISIONS	\$889,774	\$809,252	\$177,733	\$986,985	(\$97,211)
TOTAL OPERATING FUND	\$37,035,050	\$42,859,126	\$9,355,822	\$52,214,948	(\$15,179,898)
NON OPERATING FUND					
Capital Programs & Construction	\$0	\$1,104,393	\$179,818	\$1,284,211	(\$1,284,211)
Sustainable Streets Engineering Programs	\$0	\$209,383	\$45,986	\$255,369	(\$255,369)
Total Non-Operating Fund	\$0	\$1,313,776	\$225,804	\$1,539,580	(\$1,539,580)
TOTAL	\$37,035,050	\$44,172,902	\$9,581,627	\$53,754,528	(\$16,719,478)

*Figures include cost recovery for events or services totaling \$1.76 million as of month-end (April 2014). The amount includes reimbursements for payroll (both regular and overtime), overhead, and other non-labor costs as applicable.

**Projection for Remaining Months is calculated average of actuals year-to-date (year-to-date actual overtime labor cost divided by the numbers of pay periods as of the reporting period) multiplied by the remaining periods.

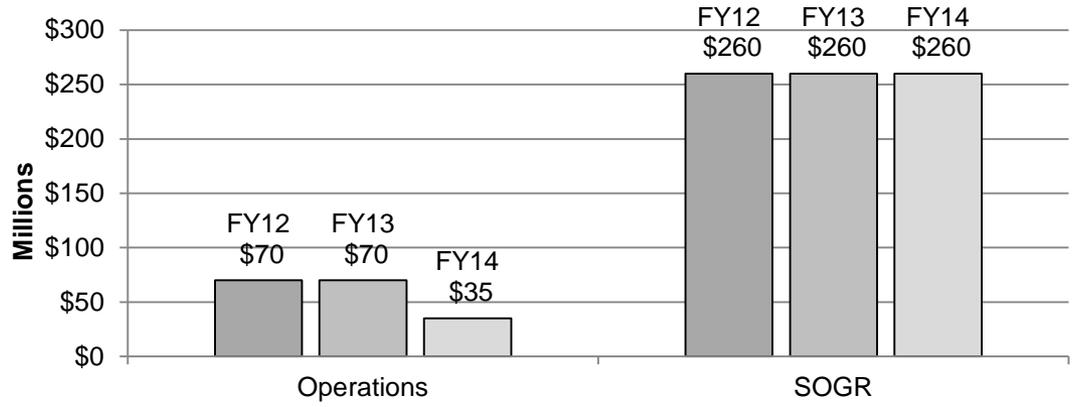
*** Charges are all related to America's Cup.

Objective 3.5

Reduce capital and operating structural deficits

Key performance indicator

3.5.1 Operating and capital structural deficit



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	FY14 Avg
3.5.1	Operating and capital structural deficit	Make progress towards closing operating and mission critical capital structural deficit	\$35M additional needed for operations, \$260M additional needed for State-of-Good Repair (SOGR) and \$1.7B 5-Year shortfall for bike, pedestrian, facilities and transit (FY14)

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

3.5.1 Develop operating needs of each function based on output and aligned to Strategic Plan

FY 15-16 operating budget has been aligned to the extent possible to support divisional functions to meet strategic plan actions, including 10% Muni service increase

3.5.3 Secure funding to increase State of Good Repair budget to at least \$250 million annually

MTC approved Transit Core Capacity Program; GO Bond to be placed on November 2014 ballot; Issued \$100 m in revenue bonds and commercial paper; Continue to work on Cap and Trade and other revenues

3.5.11 Reduce claims and workers compensation by 5% each year

Reduced worker's compensation budget by \$2 million annually to reflect projected decreases in costs; Worker's compensation costs budgeted by division completed; Entered into a third party provider contract with the rest of the City

Action item status

0% encountering issues

0% at risk

92% on track

0% on hold

★ 8% completed ★

Objective 3.5 other key updates

Reduce capital and operating structural deficits

- **Project achievements**

- FY 15 and FY 16 operating and capital budgets balanced
- November 2014 Ballot to include \$500 million Transportation General Obligation Bond
- New Advertising Agreement for vehicles: \$100 million over 15 years
- Ratings upgrades will reduce debt service costs on revenue bonds

- **Forthcoming developments**

- Issue Revenue Bonds in late 2014, early 2015
- November 2014 Ballot measure outcome
- Work with region on cap and trade revenues to transportation
- Potential future sales tax and/or VLF
- Finalize Transportation Sustainability Program and Fee (TSP)
- Develop properties

- **Challenges**

- Operating additional need for existing service level and growth unidentified
- \$260M annual State-of-Good Repair (SOGR) deficit.
- \$10 billion in capital need through 2030 of which \$3.7 billion has been identified; Additional \$1 billion in General Obligation Bonds for November 2014 ballot; Gap = \$5.3 billion gap

Goal 1 metrics

Create a safer transportation experience for everyone

Objective 1.1

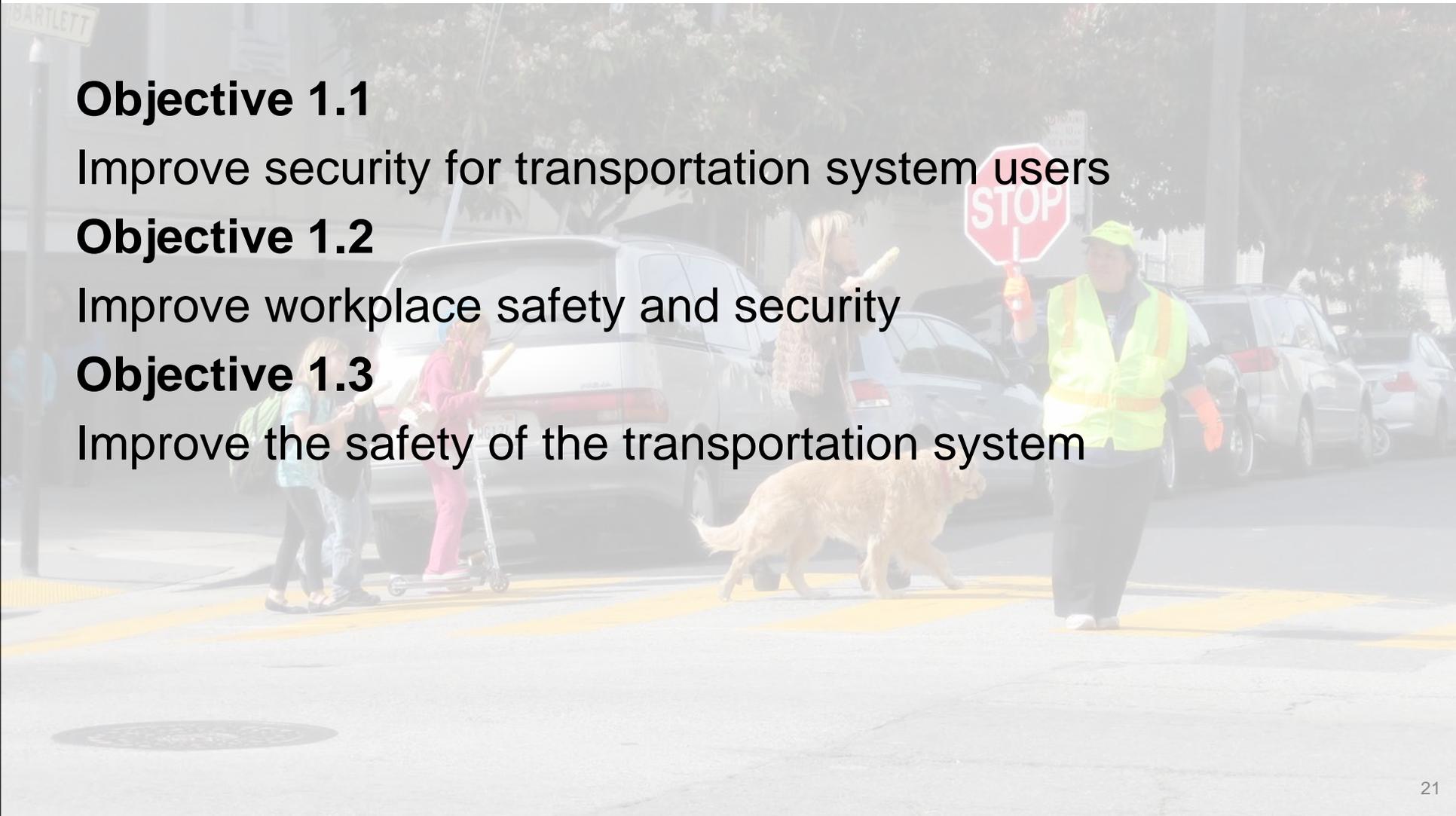
Improve security for transportation system users

Objective 1.2

Improve workplace safety and security

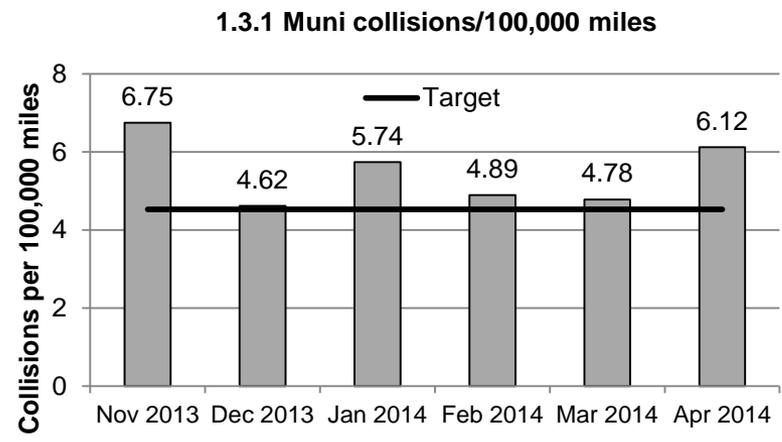
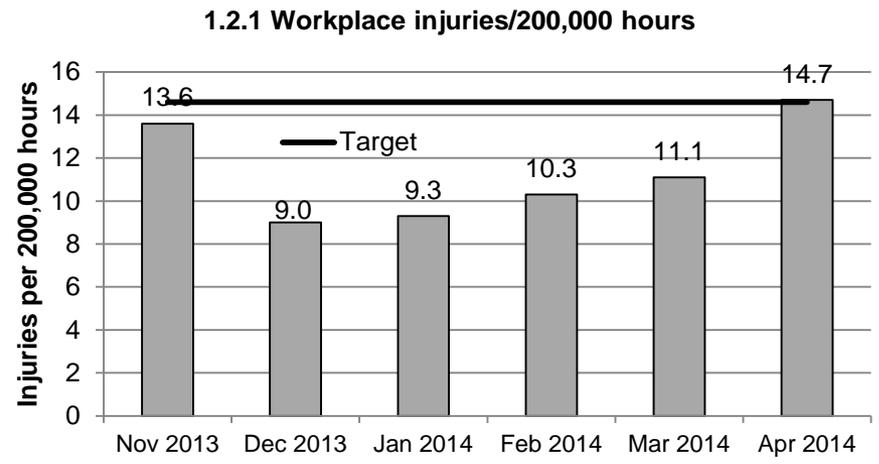
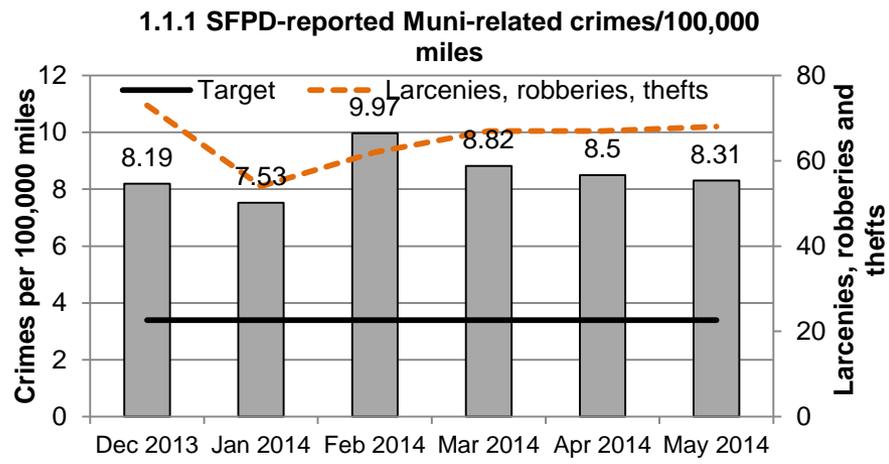
Objective 1.3

Improve the safety of the transportation system



Goal 1 metrics

Key performance indicators



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

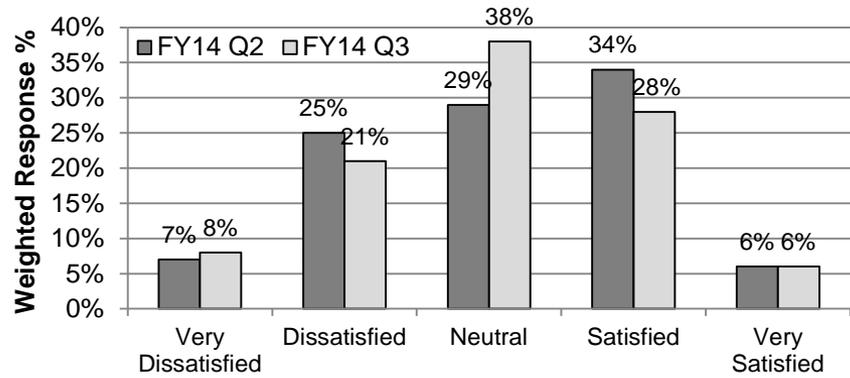
Objective 2.4

Improve parking utilization and manage parking demand

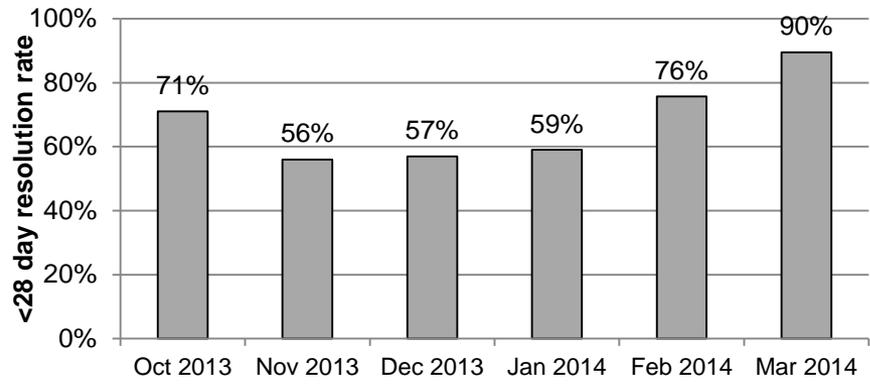
Goal 2 metrics

Key performance indicators

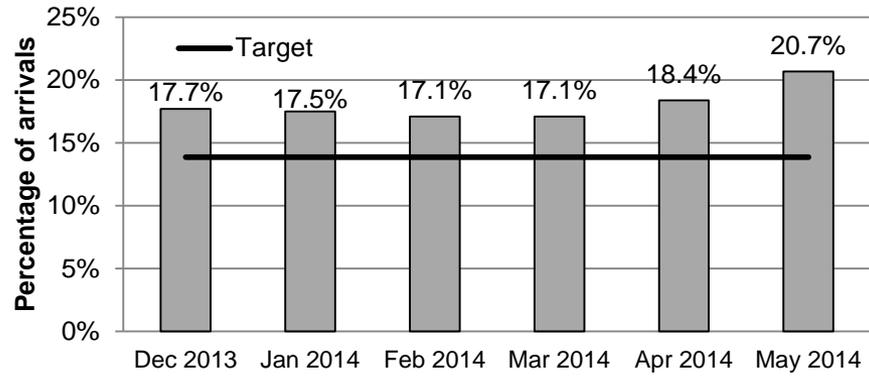
2.1.1 Customer rating: Overall customer satisfaction with transit services; scale of 1 (low) to 5 (high)



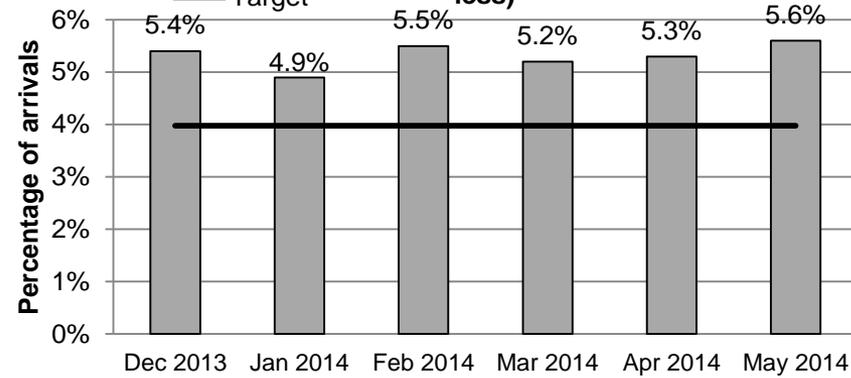
2.1.7 Percentage of actionable 311 Muni-related complaints addressed within 28 days



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



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



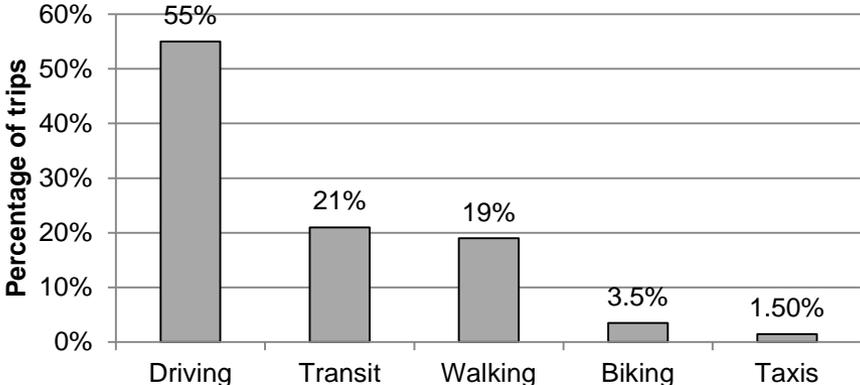
¹Results are based on a non-probability sample from opt-in SFMTA online survey conducted in 11/13 and 12/13 and are weighted to reflect the geographic distribution of San Francisco's population.

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

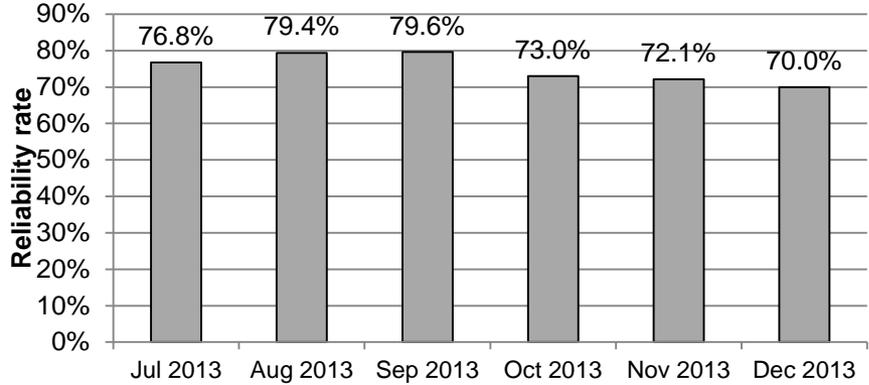
Goal 2 metrics

Key performance indicators **continued**

2.3.1 Non-private auto mode share (2011 all trips)



2.4.1 Parking reliability rate of SFpark spaces¹



¹Due to street sensor removal, occupancy-based parking measures will not be reported after Dec 2013. 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: I have the info and tools I need to do my job; I have access to info about Agency accomplishments, current events, issues and challenges;

scale of 1 (high) to 5 (low)

3.45, 3.40
(FY13)

4.2.1 Employee rating: Overall employee satisfaction; scale of 1 (low) to 5 (high)

3.36
(FY13)

4.3.1 Percentage of employees with performance plans prepared by start of fiscal year

62.5%
(FY14)

4.3.1 Percentage of employees with annual appraisals based on their performance plans

18.8%
(FY13)

Goal 4 metrics

Key performance indicators **continued**

4.4.1 Stakeholder rating: satisfaction with SFMTA decision-making process/communications; scale of 1 (low) to 5 (high)



**Survey will be
conducted in 2014.**