Strategic Plan Progress Report
Metric and Action Updates

August 2016

San Francisco, California

Agenda

- Review of the Key Performance Indicators and proposed modifications.

- Development of the Strategic Action Plan.

- Key Actions for the FY 2017 – FY 2018 Budget Cycle.

REVIEW OF THE KEY PERFORMANCE INDICATORS AND PROPOSED MODIFICATIONS

Goal 1 metrics

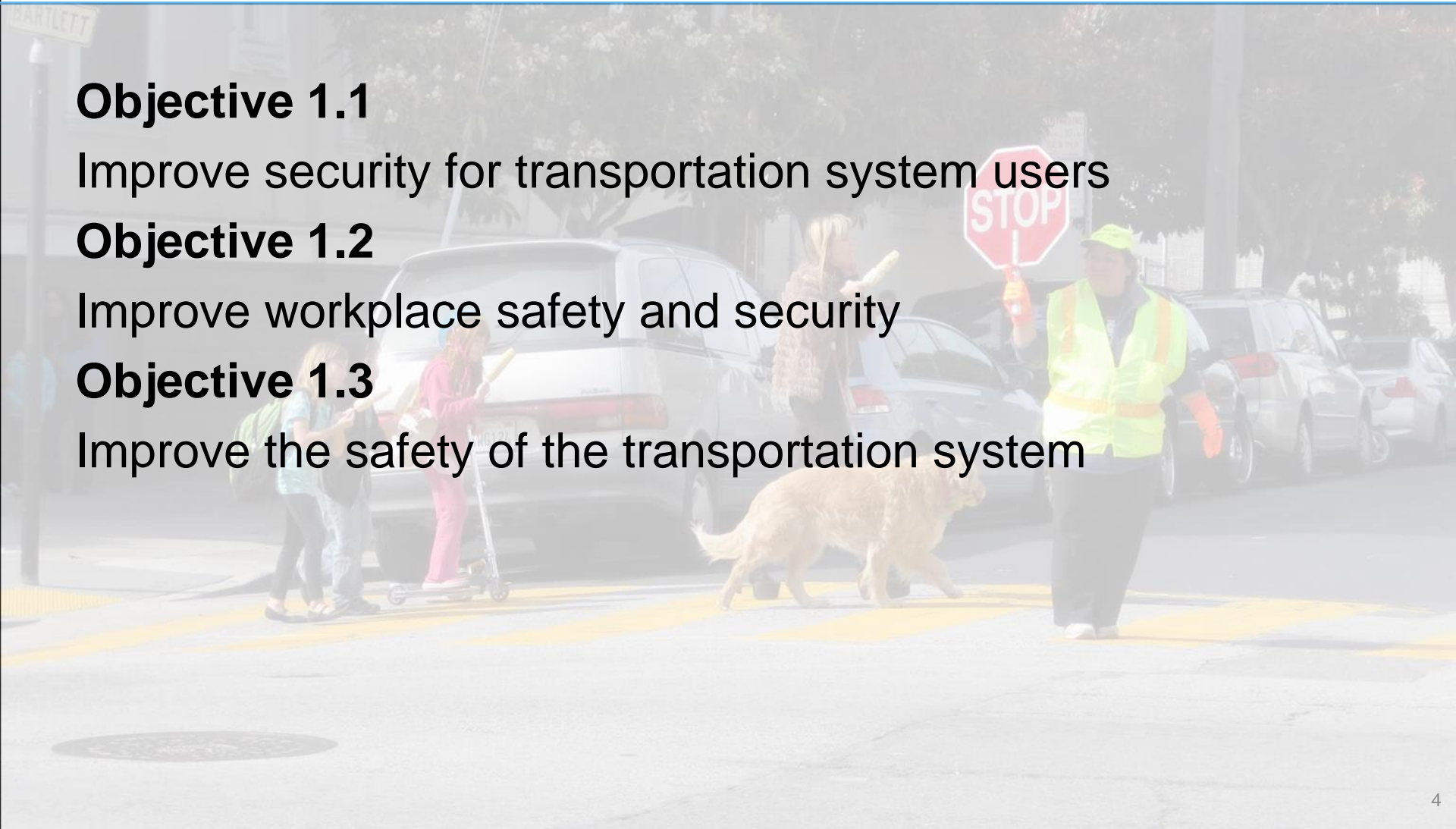Create a safer transportation experience for everyone

Objective 1.1

Improve security for transportation system users

Objective 1.2

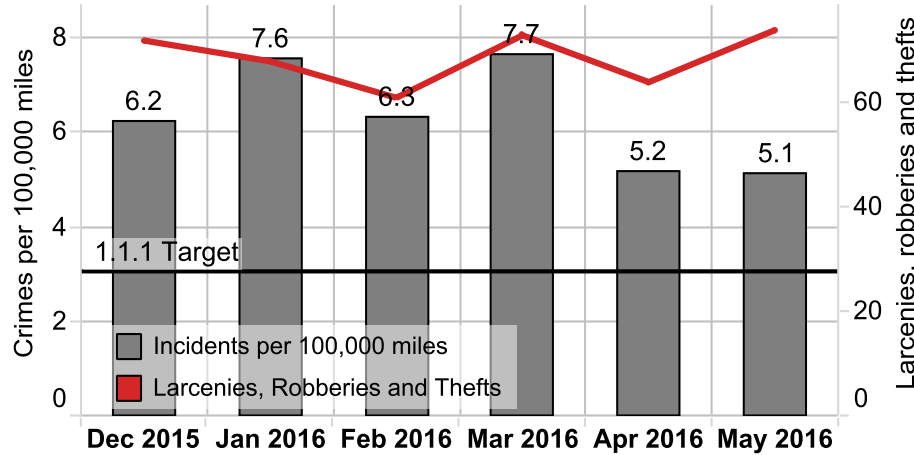Improve workplace safety and security
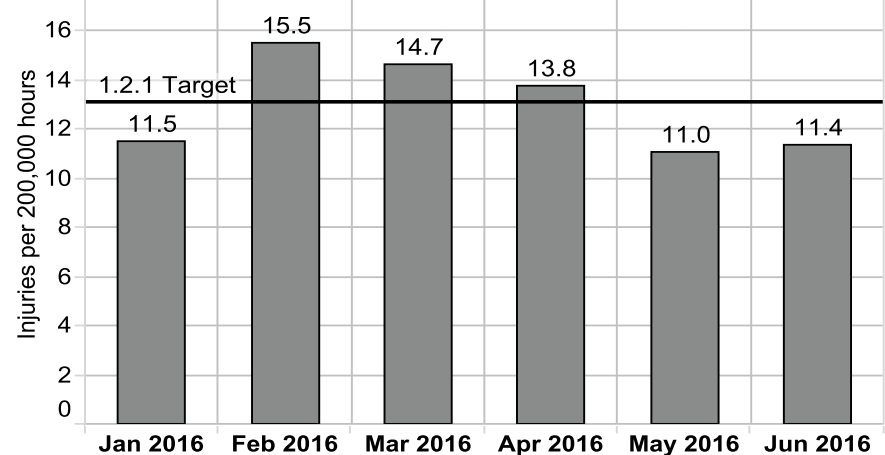
Objective 1.3

Improve the safety of the transportation system
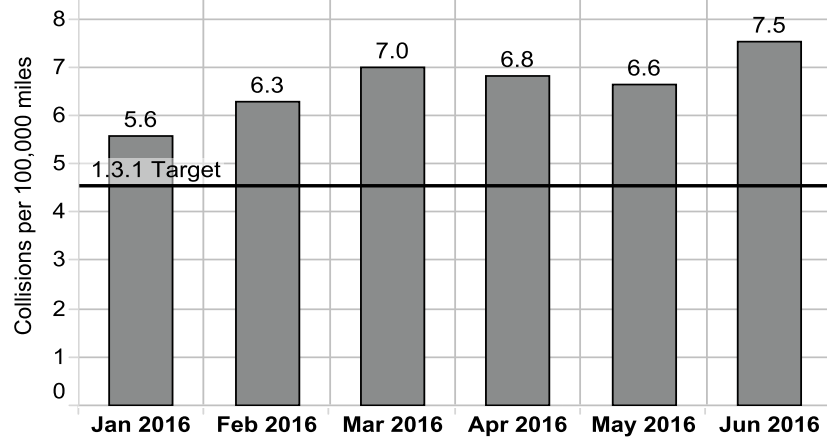
Goal 1 metrics

Key performance indicators

1.1.1 SFPD incidents per 100,000 miles

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

- Dec 2015: 6.2
- Jan 2016: 7.6
- Feb 2016: 6.3
- Mar 2016: 7.7
- Apr 2016: 5.2
- May 2016: 5.1

1.1.1 Target

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

1.2.1 Workplace injuries per 200,000 hours

Injuries per 200,000 hours

- Jan 2016: 11.5
- Feb 2016: 15.5
- Mar 2016: 14.7
- Apr 2016: 13.8
- May 2016: 11.0
- Jun 2016: 11.4

1.2.1 Target

1.3.1 Collisions per 100,000 miles

Collisions per 100,000 miles

- Jan 2016: 5.6
- Feb 2016: 6.3
- Mar 2016: 7.0
- Apr 2016: 6.8
- May 2016: 6.6
- Jun 2016: 7.5

1.3.1 Target

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

Goal 1 metric modifications

Objective 1.1
Improve security for transportation system users

Metric	SFPD-reported Muni-related crimes per 100,000 miles
Type of Change	New target
New Target	Achieve 10% reduction in incidents over FY13 baseline by end of budget cycle
Description of Change	FY13 replaces FY12 as baseline to account for previously unreported crimes at Muni stops or stations.
Updated Reporting to Begin	FY17 Q1

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

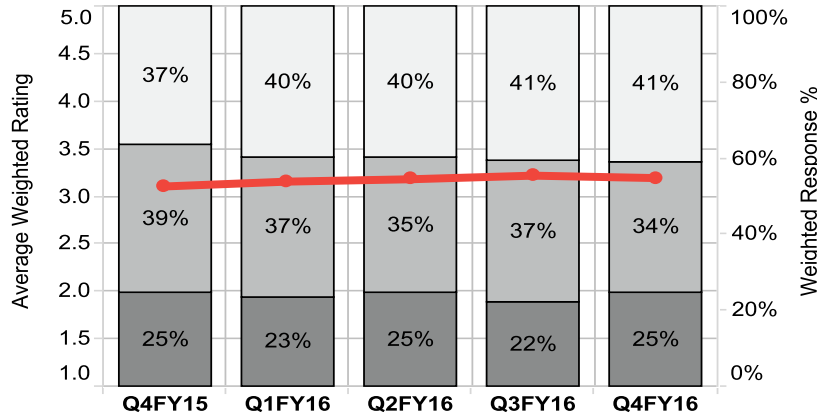**Objective 2.3**

Increase use of all non-private auto modes

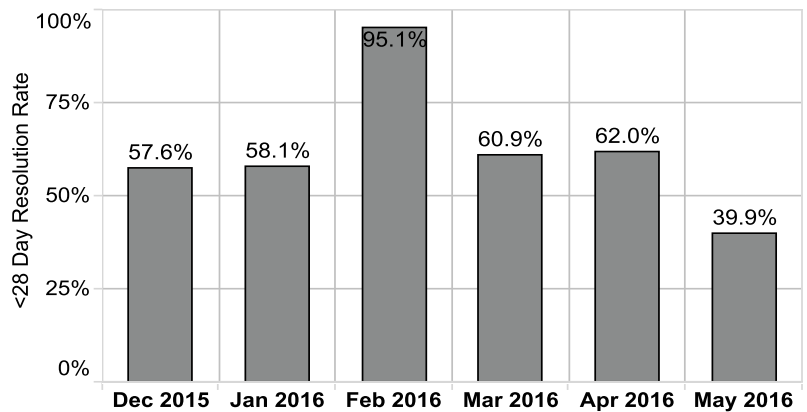**Objective 2.4**

Improve parking utilization and manage parking demand

Goal 2 metrics

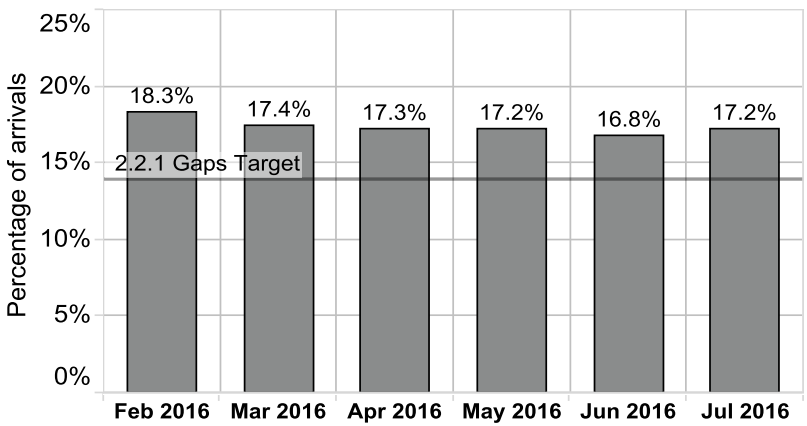## Key performance indicators

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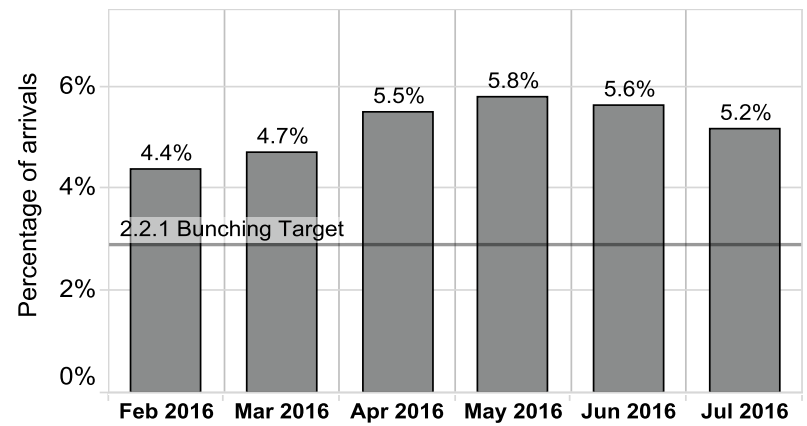

2.1.7 Percentage of actionable 311 Muni operator conduct complaints addressed within 28 business days

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.
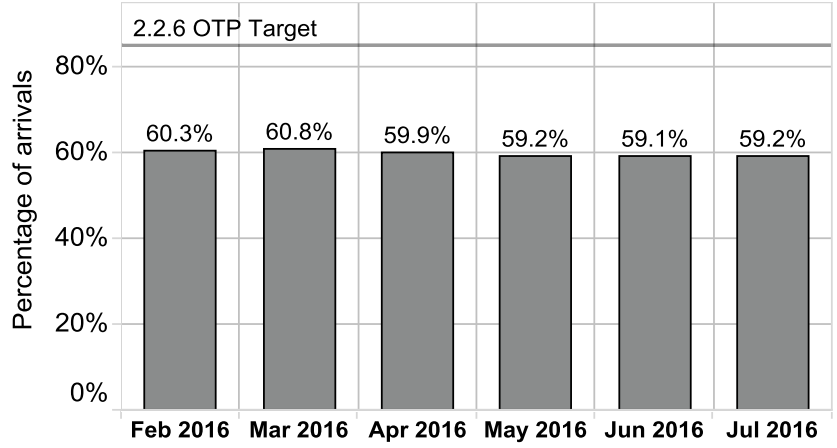
2.1.7Previously reported "Percentage of actionable 311 Muni operator conduct complaints addressed within 28 business days" results have been revised to reflect updated figures.

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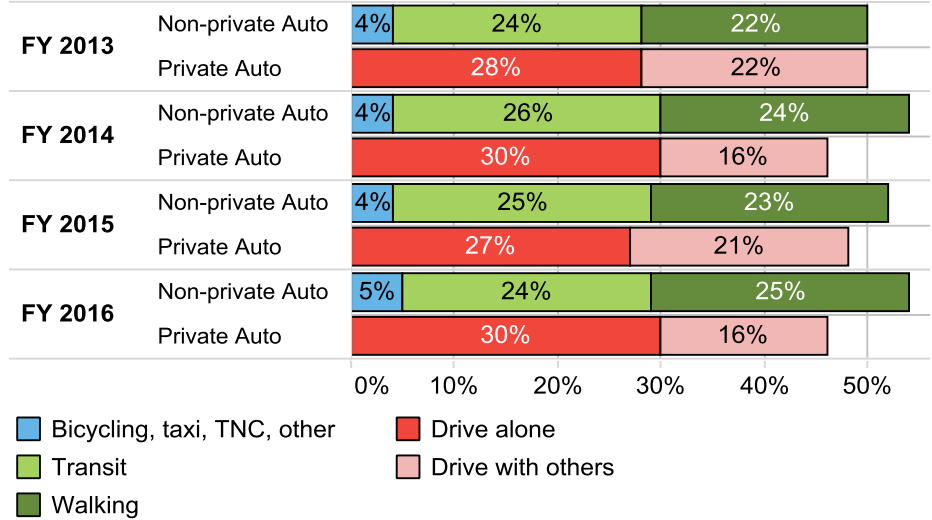
Key performance indicators continued

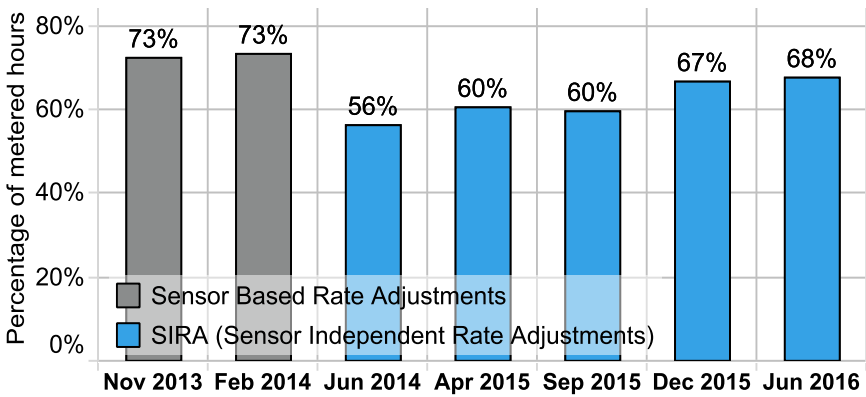### 2.2.6 Percentage of on-time performance

2.2.6 OTP Target

Percentage of arrivals

Feb 2016	Mar 2016	Apr 2016	May 2016	Jun 2016	Jul 2016
60.3%	60.8%	59.9%	59.2%	59.1%	59.2%

2.3.1 Percentage of non-private auto mode share

		Bicycling, taxi, TNC, other	Transit	Walking / Drive alone	Drive with others
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)

Percentage of metered hours

Nov 2013	Feb 2014	Jun 2014	Apr 2015	Sep 2015	Dec 2015	Jun 2016
73%	73%	56%	60%	60%	67%	68%

Legend:
- 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 2 metric modifications

Objective 2.1
Improve customer service and communications

Metric	Customer rating: Overall customer satisfaction; Scale of 1 (low) to 5 (high)
Type of Change	New target
New Target	Improve satisfaction rating by 0.2 points over baseline by end of budget cycle
Description of Change	Change of previous improvement target of 0.5 points to 0.2 points on a five point scale to establish an ambitious, yet attainable goal.
Updated Reporting to Begin	FY17 Q1

Goal 2 metric modifications

Objective 2.4
Improve parking utilization and manage parking demand

Metric	Percentage of metered hours with no rate change in SF*park* pilot areas
Type of Change	Establish target
New Target	Achieve 65% of metered hours with no rate change by end of budget cycle
Description of Change	Target is established to accompany rate change metric that was adopted in May 2015 to replace Parking reliability rate metric after parking sensors were decommissioned.
Updated Reporting to Begin	Reporting underway

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
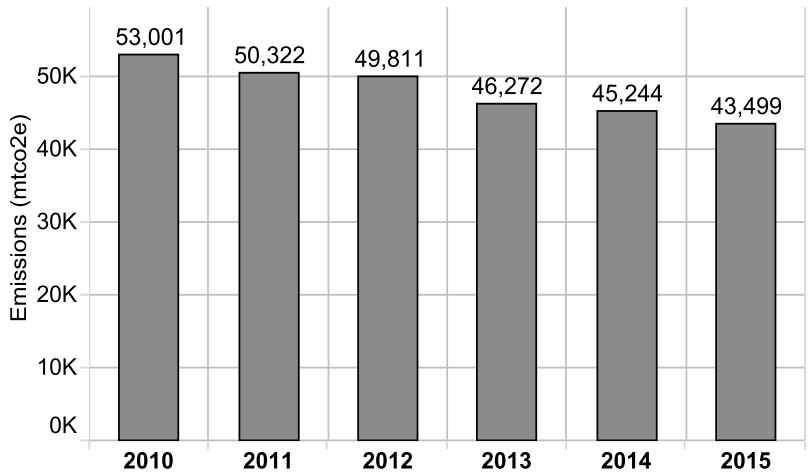
Objective 3.4

Deliver services efficiently

Objective 3.5

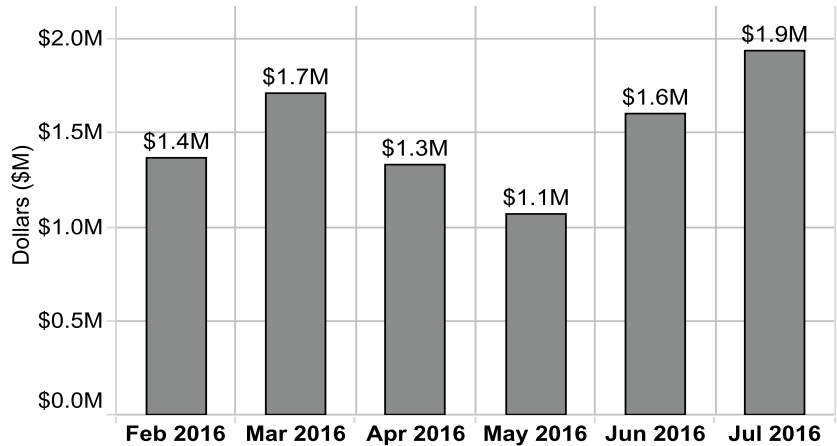Reduce capital and operating structural deficits

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

3.4.1 Transit cost per revenue hour

3.3.1 Reported results currently exclude projects in the Sustainable Streets Division portfolio.
3.4.1 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.

Key performance indicators continued

3.5.1 Operating and capital structural deficit

Operations   **Sogr**

Chart values:
- Operations FY12 $70M
- Operations FY13 $70M
- Operations FY14 $35M
- Sogr FY12 $260M
- Sogr FY13 $260M
- Sogr FY14 $260M

Y-axis: Dollars ($M), 0M to 300M

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

3.5.1 Operating and capital structural deficit figures are being recalculated and will be reported at the September 2016 Policy and Governance meeting.
Note: Reported results are subject to change as data quality improves or new data become available.

Goal 3 financials

Overtime Report (FY17 as of July 2016)

FUND/DIVISION	ANNUAL REVISED BUDGET	ACTUAL FISCAL YEAR TO DATE	PROJECTION FOR REMAINING MONTHS	END OF YEAR PROJECTION	SURPLUS (DEFICIT)
OPERATING FUND					
TRANSIT SERVICES DIVISION					
Transit Operators	$23,586,620	$1,146,547	26,162,106.73	$27,308,653	(3,722,033)
Transit Vehicle Maintenance	$6,718,500	$537,172	$13,426,207	$13,963,378	(7,244,878)
Transit – All Others	$4,544,031	$397,835	$8,945,182	$9,343,017	(4,798,986)
Subtotal Transit Services Division	**$34,849,151**	**$2,081,554**	**$48,533,495**	**$50,615,049**	**(15,765,898)**
SUSTAINABLE STREETS DIVISION					
Parking Control Officers	$994,984	$116,814	$636,143	$752,956	242,028
Sustainable Streets – All Others	$794,714	$17,354	$423,712	$441,066	353,648
Subtotal Sustainable Streets Division	**$1,789,698**	**$134,168**	**$1,059,855**	**$1,194,022**	**595,676**
SFMTA AGENCY WIDE	**$0**	**$0**	**$0**	**$0**	**0**
ALL OTHER DIVISIONS	**$709,466**	**$44,511**	**$1,112,780**	**$1,157,291**	**(447,825)**
TOTAL OPERATING FUND	**$37,348,315**	**$2,260,232**	**$50,706,130**	**$52,966,362**	**(15,618,047)**
NON OPERATING FUND					
Capital Programs & Construction	$0	$32,402	$810,054	$842,456	(842,456)
Sustainable Streets Engineering Programs	$0	$17,252	$431,290	$448,541	(448,541)
Total Non-Operating Fund	**$0**	**$49,654**	**$1,241,343**	**$1,290,997**	**(1,290,997)**
TOTAL	**$37,348,315**	**$2,309,886**	**$51,947,473**	**$54,257,359**	**(16,909,044)**

(a) 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 $16K as of July 2016. The actual cist recovery is minimal given it's early in the fiscal year, the recovery amounts incorporated on the projections assumes same level as FY16.

Goal 3 metric modifications

Objective 3.1
Reduce the Agency's and the transportation system's resource consumption, emissions, waste, and noise

Metric	SFMTA carbon footprint (metric tons C02e)
Type of Change	Establish target
New Target	Reduce SFMTA greenhouse gas emissions 80% below 1990 level by end of budget cycle
Description of Change	Target reflects new and anticipated advancements in fleet and fuel technologies to achieve 80% reduction below 1990 level.
Updated Reporting to Begin	Reporting underway

Goal 3 metric modifications

Objective 3.2
Increase the transportation system's positive impact to the economy

Metric	Muni Ridership
Type of Change	New metric
New Target	Increase Muni ridership
Description of Change	Ridership replaces impact of Muni delays as key indicator of the SFMTA's positive economic benefit to the City. Growing ridership is both a significant correlate and contributor to urban economic growth.
Updated Reporting to Begin	FY17 Q1

Goal 3 metric modifications

Objective 3.4
Deliver services efficiently

Metric	Passengers per Revenue Hour
Type of Change	New metric
New Target	Achieve 3% growth in passengers per revenue hour by end of budget cycle
Description of Change	Passengers per revenue hour replaces cost per revenue hour as key indicator for efficient delivery of services to enable more current and frequent monthly reporting.
Updated Reporting to Begin	FY17 Q3

Goal 3 metric modifications

Objective 3.5
Reduce capital and operating structural deficits

Metric	Structural operating budget deficit
Type of Change	New methodology and new target
New Target	Make progress towards closing operating structural deficit
Description of Change	New methodology reflects unmet funding needs identified by SFMTA divisions to deliver mission critical services
Updated Reporting to Begin	FY17 Q1

Goal 3 metric modifications

Objective 3.5
Reduce capital and operating structural deficits *continued*

Metric	Structural capital budget deficit (State of Good Repair)
Type of Change	New methodology and new target
New Target	Make progress towards closing State of Good Repair structural deficit
Description of Change	New methodology defines capital budget deficit as the difference between annual full asset replacement need for State of Good Repair and funds secured to enable more current and frequent quarterly reporting.
Updated Reporting to Begin	FY17 Q1

Goal 4 metrics

Create a workplace that delivers outstanding service

Objective 4.1

Improve internal communications
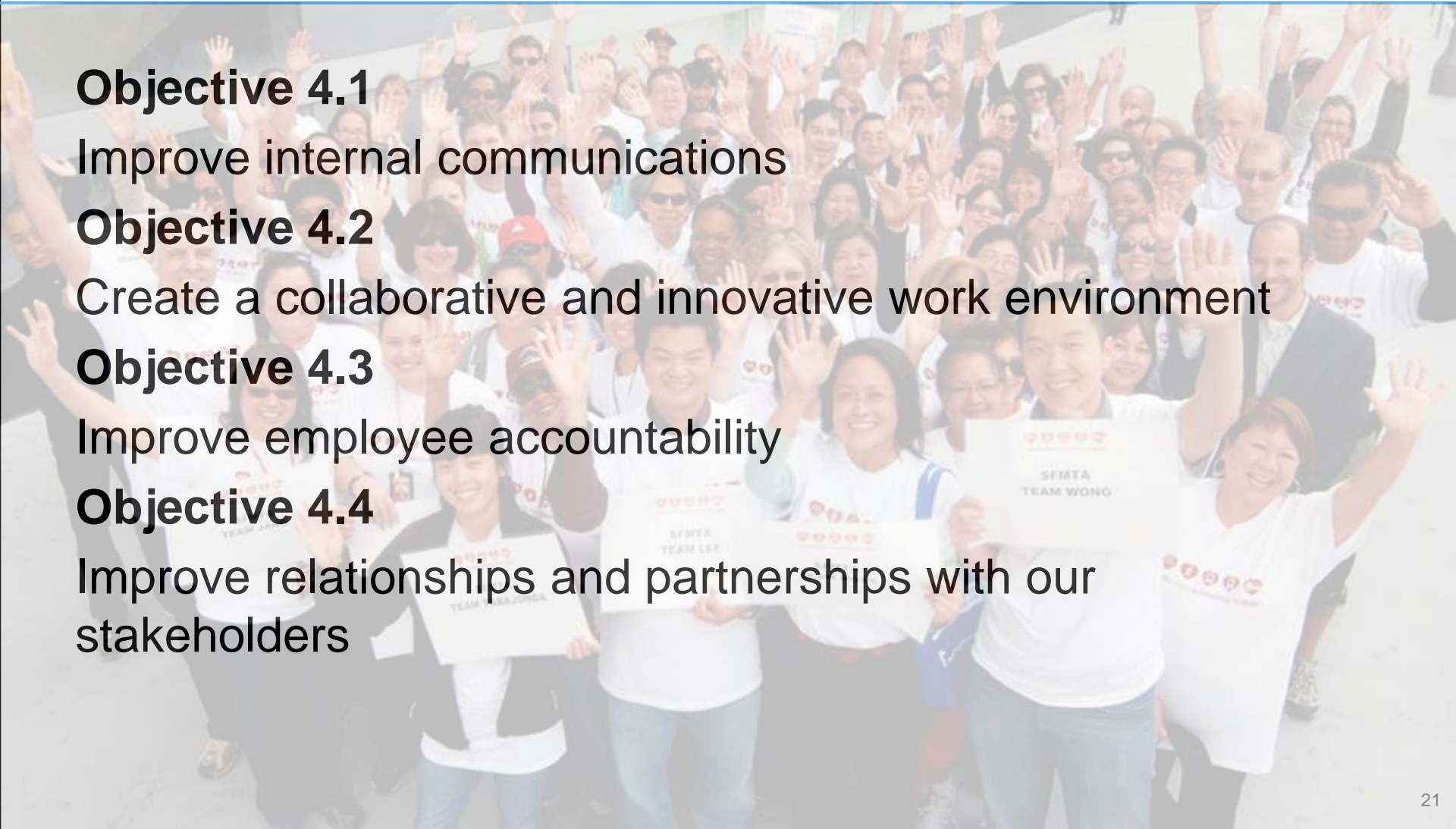
Objective 4.2

Create a collaborative and innovative work environment

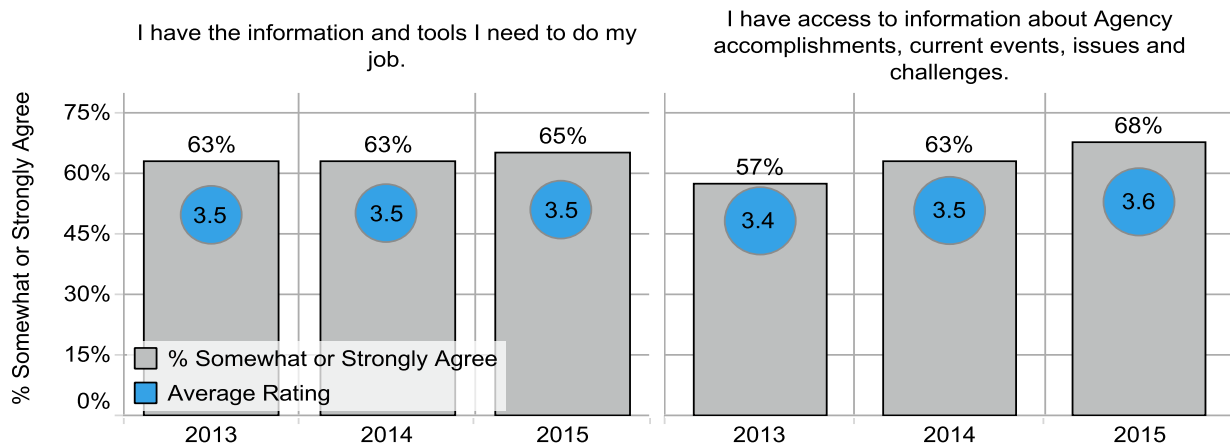**Objective 4.3**

Improve employee accountability

Objective 4.4
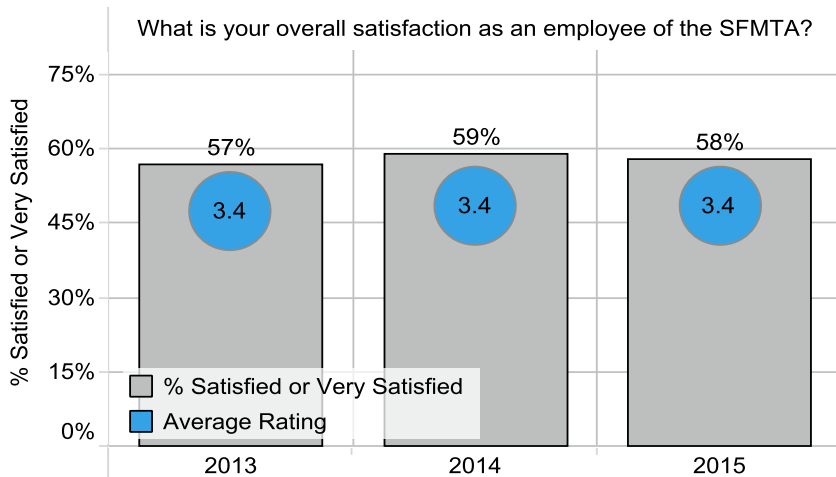
Improve relationships and partnerships with our stakeholders
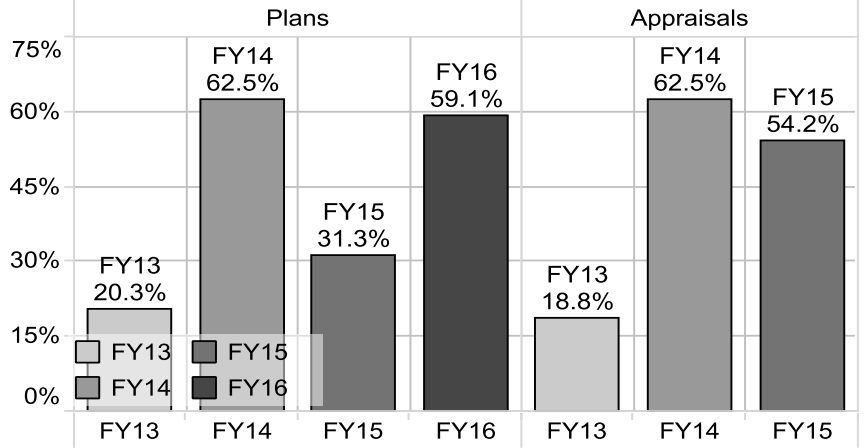
Key performance indicators

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.

- 2013: 63% — 3.5
- 2014: 63% — 3.5
- 2015: 65% — 3.5

% Somewhat or Strongly Agree

☐ % Somewhat or Strongly Agree
🔵 Average Rating

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

- 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?

- 2013: 57% — 3.4
- 2014: 59% — 3.4
- 2015: 58% — 3.4

% Satisfied or Very Satisfied

☐ % Satisfied or Very Satisfied
🔵 Average Rating

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

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

Appraisals
- FY13: 18.8%
- FY14: 62.5%
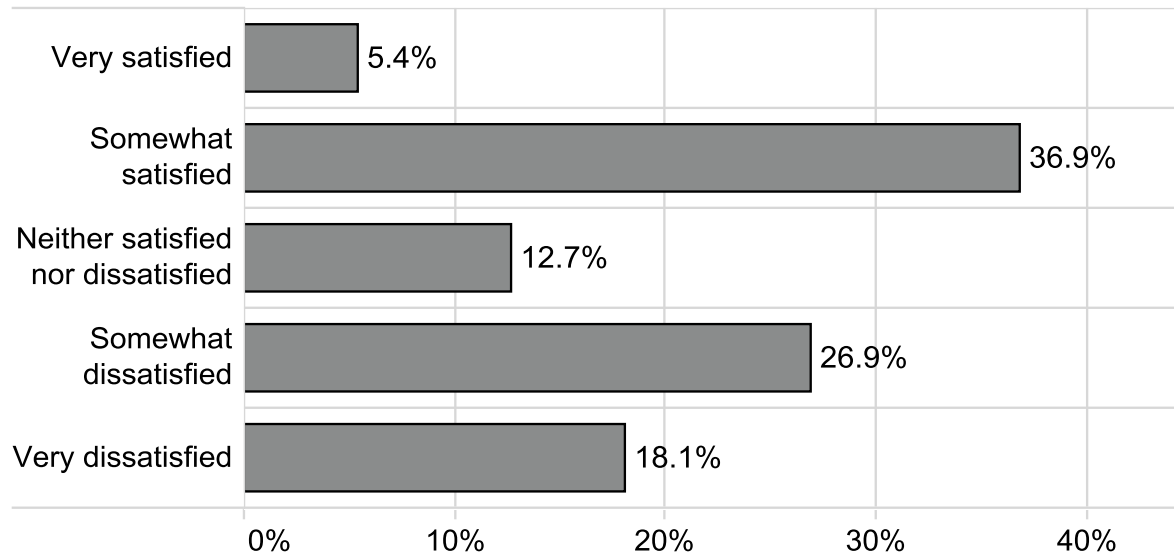- FY15: 54.2%

☐ FY13   ☐ FY15
☐ FY14   ■ FY16

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

Key performance indicators *continued*

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

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.

Goal 4 metric modifications

Objective 4.4
Improve relationships and partnerships with our stakeholders

Metric	Stakeholder rating: satisfaction with SFMTA's management of transportation in San Francisco; scale of 1 (low) to 5 (high)
Type of Change	New metric and establish target
New Target	Improve satisfaction rating by 0.2 points over baseline by end of budget cycle
Description of Change	New metric replaces *satisfaction with SFMTA decision-making process/communications* to reflect question from SFMTA Awareness & Perception Survey that was conducted in 2015. The next survey is anticipated to be deployed in 2017.
Updated Reporting to Begin	Reporting underway

DEVELOPMENT OF
THE NEXT ACTION PLAN

Goals for this cycle of the Strategic Plan

- Encourage the development of new initiatives, programs, and processes.
  - Include critical work and organizational process improvements.
  - Migrate tracking of former actions to staff performance plans.

- Develop prioritized list of focused, more impactful, and achievable Actions.

- Focus on Actions that will positively impact on the Key Performance Indicators (KPIs).

Proposed definition of a Strategic Action

A Strategic Action is a new project or process initiative that contributes to the overall achievement of the Agency's Strategic Objectives and will positively impact the Strategic Plan metrics.

- The scope and milestones of an Action Item should be trackable in the monthly Transtat meetings and clearly demonstrate when the Item is complete.

- Actions will likely involve and impact more than one of the Agency's Divisions.

- Resources required (staffing, materials and supplies, personal services, etc.) should be identified in detail early in the process.

Where did these Actions come from?

Each Objective Owner established the list of Actions for their Objective, informed by:

- Brainstorming Sessions with the Executive Team, Senior Management Team, FY 2015 – FY 2016 Action Leads and other key staff.

- 2015 Employee Survey Results and suggestions.

- Feedback on Cycle Two Actions from the FY 2015 – FY 2016 Action Leads.

- Objective Owners' expertise and other suggestions from their team.

- A survey of all staff to identify some of the most important items for the agency to take on.

KEY ACTIONS FOR THE FY 2017 – FY 2018 BUDGET CYCLE

Overview of the FY 2017 – FY 2018 Actions

- **77 Strategic Actions to be implemented in the next two years:**
  - Represents substantial initiatives for the agency.
  - Sets up the agency for the development of the next Strategic Plan.
  - Establishes a list of Highlighted Actions that SFMTA Staff identified as the most important Actions to implement in the next two years.

- Reporting and discussion process with the SFMTA Board's Policy & Governance Committee to remain the same.

Goal 1: Safety

Highlighted Actions
Work with SFPD to deploy police officers more effectively across the transit system.
Identify causes of preventable transit collisions and assign resources to reduce them.
Implement the SFMTA Facilities Upgrades including: workplace safety-related upgrades, ergonomics, communications programs, and space efficiency projects.
Update communications systems and programs in subway, stations, in vehicles, and on street.
Implement the Vision Zero Safety Engineering Program.

Goal 2: Travel Choices

Highlighted Actions
Implement strategic short-term and long-term initiatives to raise systemwide Muni on-time performance.
Reduce traffic delays on Muni network.
Implement improvements to NextBus and other on-vehicle communications.
Improve citywide wayfinding for all modes of transportation and general navigation around the city.
Implement customer service standards for all parts of the agency, including training for customer-facing staff in Transit, Planning, and Security & Enforcement.

Goal 3: Livability

Highlighted Actions
Research and advance innovative fare products like the monthly fare accumulator and non-peak discount fares.
Develop and implement a clear project development process for all project managers and re-align functions within the agency to improve project delivery.
Implement Rate My Ride, Transit Fare Inspector capabilities, and other improvements in next phase of MuniMobile project.
Consolidate transit service management into a cross-functional group to manage service as a system.
Develop SFMTA Properties.
Identify and secure additional operating fund sources.

Goal 4: Service

Highlighted Actions
Improve the efficiency and effectiveness of the hiring process.
Establish an agencywide Staff Mentoring Program.
Establish a new employee orientation program to support adoption of Agency standards and culture.
Reboot SFMTA Intranet, including format, processes, staff/team specific portals, knowledge-sharing, and collaboration tools.
Improve recruitment for SFMTA positions.