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**SAN FRANCISCO
MUNICIPAL TRANSPORTATION AGENCY**

DIVISION: Sustainable Streets Planning

BRIEF DESCRIPTION:

Presentation and discussion of draft fiscal year (FY) 2013-FY 2018 SFMTA Strategic Plan and related policy issues.

SUMMARY:

- The draft strategic plan will cover six fiscal years from 2013-2018, to coincide with the next three, two-year budget cycles. In addition, the draft plan will link the six-year capital improvement plan and annual division work plans for greater consistency. Using the information gathered from workshops with internal and external stakeholders, the Executive Team drafted a new vision and mission statement, and four overarching goals with their related objectives, proposed measurement indicators and targets.
- Workshops with the staff from various disciplines within the agency were held over consecutive drafting iterations to gather feedback and suggest changes. Additional outreach presentations, workshops and off-site surveys were held to give all SFMTA staff the opportunity to participate in the process.
- Throughout the development of the Strategic Plan, there have been several recurring questions posed by staff and external stakeholders regarding SFMTA policy. These include clear prioritization of the right of way with competing modes and maintaining our existing system and expanding new services. Input and direction from the SFMTA Board of Directors is needed prior to the formal adoption of the Strategic Plan.

ENCLOSURES:

1. Draft SFMTA Strategic Plan

APPROVALS:

DATE

DIRECTOR _____

SECRETARY _____

ASSIGNED SFMTAB CALENDAR DATE: ____

PURPOSE

The Draft Fiscal Year (FY) 2013 - FY 2018 SFMTA Strategic Plan defines the purpose of the Agency and establishes goals and objectives that will guide the Agency's work for the next six years. The plan will be used as a guide to effectively manage the agency's resources provide a clear focus on priorities. The Draft SFMTA Strategic Plan also outlines key performance indicators and targets that will provide a method by which the Agency's progress can be measured.

DESCRIPTION

Adopted in July 2007, the current Strategic Plan covers FY 2008-FY 2012. In September, 2010 the Board reviewed this plan and discussed the current issues and opportunities facing the agency. The Board requested that staff to engage in an interactive discussion with all stakeholders regarding how best to update the plan and incorporate new opportunities that had arisen since the plan was first adopted.

The draft FY 2013 - FY 2018 Strategic Plan responds to the suggestions from the September workshops and the multiple stakeholder meetings that have occurred since then. This plan also reflects the changes in the residential and employment growth projections in response to the recent economic downturn. The six-year Strategic Plan will be used to take the unconstrained 20-year Capital Plan and prioritize the capital investments needed to support the achievement of the Agency's goals and objectives to develop the five-year Capital Improvement Program. These documents, in conjunction with the 20-year Financial Operating Plan, will inform the development of the two-year Operating and Capital Budget. Each SFMTA Division will develop their goals and individual performance plans on an annual basis. In essence, the FY 2013 - FY 2018 Strategic Plan is the six-year work plan for the SFMTA.

Plan Framework

The framework for the new plan will differ slightly from the last plan. Rather than including information down to the initiative level as was done previously, focus instead was placed on the creation of a new vision for the Agency and the goals and objectives needed to achieve this vision. The development of strong strategic goals and objectives for this plan will provide a solid foundation on which each of the SFMTA Divisions will then develop initiatives and actions in line with the new budget.

The elements included in this Strategic Plan are defined as follows:

- **Vision:** Describes what we, as an agency, want to be by FY 2018
- **Mission:** What the SFMTA does
- **Goals:** Key areas on which to focus Agency efforts to achieve our vision
- **Objectives:** Specific ways the Agency can accomplish the goals
- **Performance Indicators:** How the Agency will track the implementation of the Strategic Plan

In addition to these elements, a key actions section outlining the programs and initiatives will be developed based on the feedback received at this workshop.

Plan Development

Developing the FY 2013-FY 2018 Strategic Plan has been a year-long process that started from the Board workshop in September, 2010. The first step included customer surveys and information-gathering sessions with SFMTA staff, representatives from city departments, transportation partner agencies, business, labor, advocacy and other external stakeholders. The SFMTA Executive Team took this information and drafted the plan's elements. Through surveys and a series of multidisciplinary staff workshops, the staff-led strategic planning team collected feedback on the Plan and reported suggested modifications back to the Executive Team. Once the Strategic Plan's vision, mission statement, goals and objectives were set, performance indicators were developed so the Agency can chart its progress towards achieving the vision.

Information Gathering

The first step in the development of the FY 2013-FY 2018 Strategic Plan was to survey San Franciscans to ascertain their use of the transportation network and their priorities for infrastructure growth, funding and prospective changes in policy. The phone and online surveys conducted December 2010 to February 2011 were completed with 579 and 813 respondents respectively. Though the questions asked in both surveys were on similar themes, the phone survey was deliberately structured to capture a "snapshot" of the residential demographics of San Francisco and the online survey was open to any residents, visitors or workers who chose to participate.

In addition to the surveys, a series of three workshops were held during July and August 2011 to gather more specific information regarding the current transportation network in San Francisco and how the Agency should best proceed over the next six years. The first two workshops were comprised of SFMTA staff nominated by the Executive Team and key external stakeholders from city departments, transportation partner agencies, business, labor and advocacy groups. The 45 senior level participants offered comments on the strengths, weaknesses, opportunities and threats to the SFMTA and offered broad comments on five themes relating to the agency:

- Customer focus,
- Network performance,
- Communications,
- Financial sustainability, and
- Organizational development.

The second workshop expanded the discussion of the five theme areas and asked the participants to propose specific objectives and actions in each area to get a better understanding of how the stakeholders believe the Agency should move forward. The third information-gathering workshop was designed to engage 16 targeted SFMTA staff members from specific groups within the agency to gather a different perspective of the Agency's strengths, weaknesses, opportunities and threats. The targeted workshop participants also discussed the five theme areas

and this information served as a valuable check against the work already conducted by the broader key stakeholders in the first two workshops.

Drafting the Plan Elements

The SFMTA Executive Team met several times in September and October 2011 to develop the plan elements, review feedback and make modifications to the plan. Using the information gathered in the customer surveys, preliminary stakeholder workshops and through a review of existing SFMTA planning documents, local, state and federal policies, the SFMTA Executive Team completed a visioning exercise to develop a new vision and mission statement for the Agency. The purpose of the new vision and mission statement are to act as strong and concise statements designed to motivate the needed shift in focus from the last strategic Plan and guide the SFMTA for the next six years.

After developing the vision and mission statement, the Executive Team identified the four overarching goal areas for SFMTA in order to achieve the vision. These goal areas relate directly back to the new vision for the Agency and addresses the SFMTA's key responsibilities. The Executive Team then developed key objectives to better establish the new path for the Agency.

Once those objectives were agreed upon and communicated to staff for feedback and clarity, the Executive Team worked with the strategic planning team to create the specific measurements and targets the SFMTA leadership and staff will use to accomplish each goal. These indicators are meant to act as a device to measure our progress towards the achievement of our goals. Although these may only specifically address one of the modes under the purview of the SFMTA, additional tracking methods and mode-specific information will be recorded and reported independently of the Strategic Plan. The Executive Team reviewed these indicators and has drafted targets for each budget cycle to be completed under this Strategic Plan.

Staff input on the Draft Plan

In an effort to make the development of the strategic plan a collaborative and inclusive process, the strategic planning team went to great lengths to ensure staff attendance matched the diversity and multidisciplinary nature of the agency. The team set up targeted outreach, provided open houses, and web surveys for staff to participate. In addition, the team presented with the Division director at all-staff meetings, and other forums for feedback. During this process the team gathered manual, electronic and verbal feedback from each opportunity including a staff web-survey and a manual survey for frontline staff that did not have readily available email or web access.

In total, thousands of handwritten and electronic comments have been submitted during this process, providing a rich overview of the issues and opportunities facing the SFMTA. The strategic planning team has spent many hours sifting, sorting and distilling the key themes. The strategic planning team has learned a great deal of information about how the staff feels about the current and future issues and opportunities and communicated that to the Executive Team throughout this process. This draft strategic plan is consistent with and reflects this feedback.

Strategic Plan Policy Issues

Throughout the development of the strategic plan, there have been several recurring questions posed by SFMTA staff and external stakeholders regarding SFMTA policy direction. Input and direction from the Board on the following areas are needed to finalize the plan and develop the key actions.

SFMTA modal priorities

The city has a current mode split of approximately 60 percent private auto and 40 percent from walking, transit, bicycling and taxi.

- We have one of the slowest and most crowded transit systems in the nation that runs in congested and un-protected rights of way.
- Bicycling is growing and the demographics are broadening by each count. Research worldwide shows that more people of all ages ride more often with protected bicycle lanes and available bicycle parking facilities.
- San Francisco is among the most walkable cities in the world and recently was awarded a gold level walking city. Yet for all these achievements, we have unacceptable levels of serious and fatal injuries.
- Recent pavement to parks projects, in-street bicycle corrals and parklets have been very popular and now dozens of businesses are asking for more throughout the city.

Since 1973, the transit first policy has been used to articulate prioritization of streets with transit over the accommodation of the movement of automobiles. Evidence shows that the city has not consistently upheld this policy and transit speeds are the result of this inconsistency. In addition, with the success of the almost two-thirds completion of the bicycle plan, protected separated facilities show the greatest ability to attract more diverse people onto everyday bicycling.

San Francisco's streets are at crossroads: we can continue to try and accommodate all modes with limited success or we can be more explicit in our priorities. Many cities are in the process or have reversed the modal split in favor of walking, transit and bicycling by prioritizing the street for these three modes in that order. Where there is not enough room to accommodate all three, the stretch of street is slowed down to create a more pedestrian paced environment.

Should we be more explicit in the order of how we prioritize modes? How should we uphold these priorities?

State of Good Repair and System Expansion

Traditional public funding sources are becoming less certain moving forward. The city has made several decisions to grow in a certain way which relies on a well maintained and expanded walking, transit and bicycle network. Recent efforts by staff have quantified the costs needed to maintain our existing assets in a state of good repair. At the same time, the agency is undertaking planning and design of expansion projects that will likely need to compete with each other for the same resources.

The agency will need to make to make difficult decisions regarding the allocation of resources to maintain mission critical assets while also ensuring that new cost-effective transportation capacity is strategically added to meet diverse and growing demands.

Should we be more explicit in how we prioritize the maintenance and strategic expansion of our assets? How should we uphold these priorities?

Next Steps

Following this SFMTA Board workshop, the Executive Team will finalize the plan elements, circulate the document to staff and key stakeholders including the Citizens Advisory Council (CAC) and submit the final plan for adoption in January 2012.

The SFMTA Divisions will work to develop detailed initiatives and actions to meet the new objectives within the six-year timeframe. This effort will be coordinated with the FY 13/FY 14 Capital and Operating Budgets. Divisional goals and Individual performance plans for SFMTA staff in FY 2013 will also be developed in line with the new Strategic Plan.