



SFMTA

TRANSPORTATION 2050

Workshop

SFMTA Board of Directors
August 17, 2021

Transportation 2050 (T2050) presents possible futures and actions to address transportation needs and priorities in San Francisco.

Years of community planning, visioning and technical analysis

Transportation
Task Force 2013
(T2030)

Transportation
Task Force 2018
(T2045)

ConnectSF

Vision Zero Action Plan

SFMTA 20-Year Capital Plan

SFMTA State of Good Repair Report

2021 SFMTA Community Survey

SFMTA 5-Year CIP

SFMTA 2-Year Budget

SF Transportation Plan

We have analyzed
numerous possible futures
and it is time for a call to action.

**We are \$50 billion short of the transportation
system San Francisco needs over the next 30 years.**

**But we can act now to put
San Francisco on a path to success.**

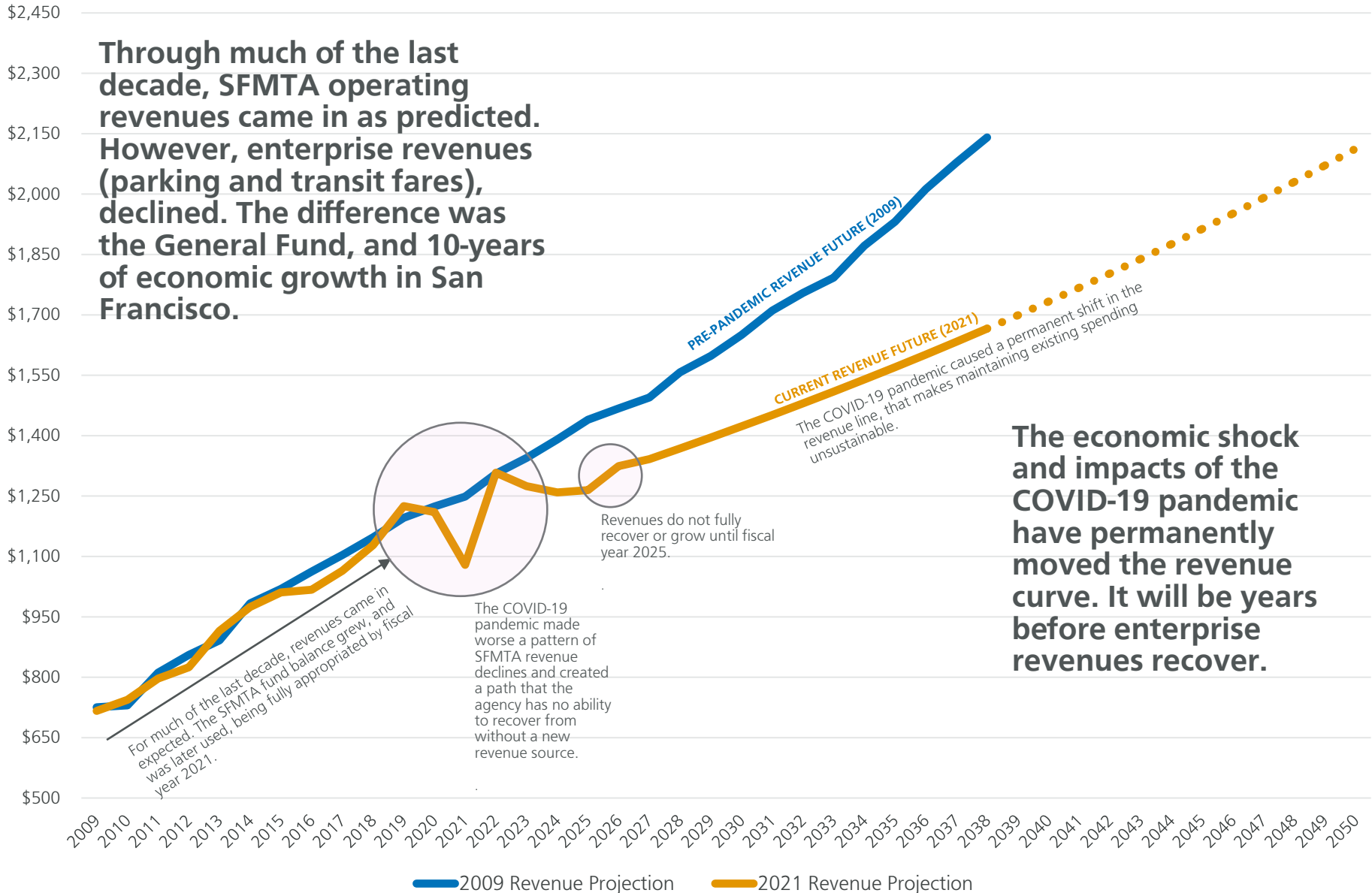
How did we get here?
San Francisco has grown.
Transportation has changed.
Our financial structures have not.

While our visions and values have modernized, how we fund the vision and advance our values has not.

We have looked at our past,
and charted out our future.

We are on an unsustainable path.
But we can correct it.

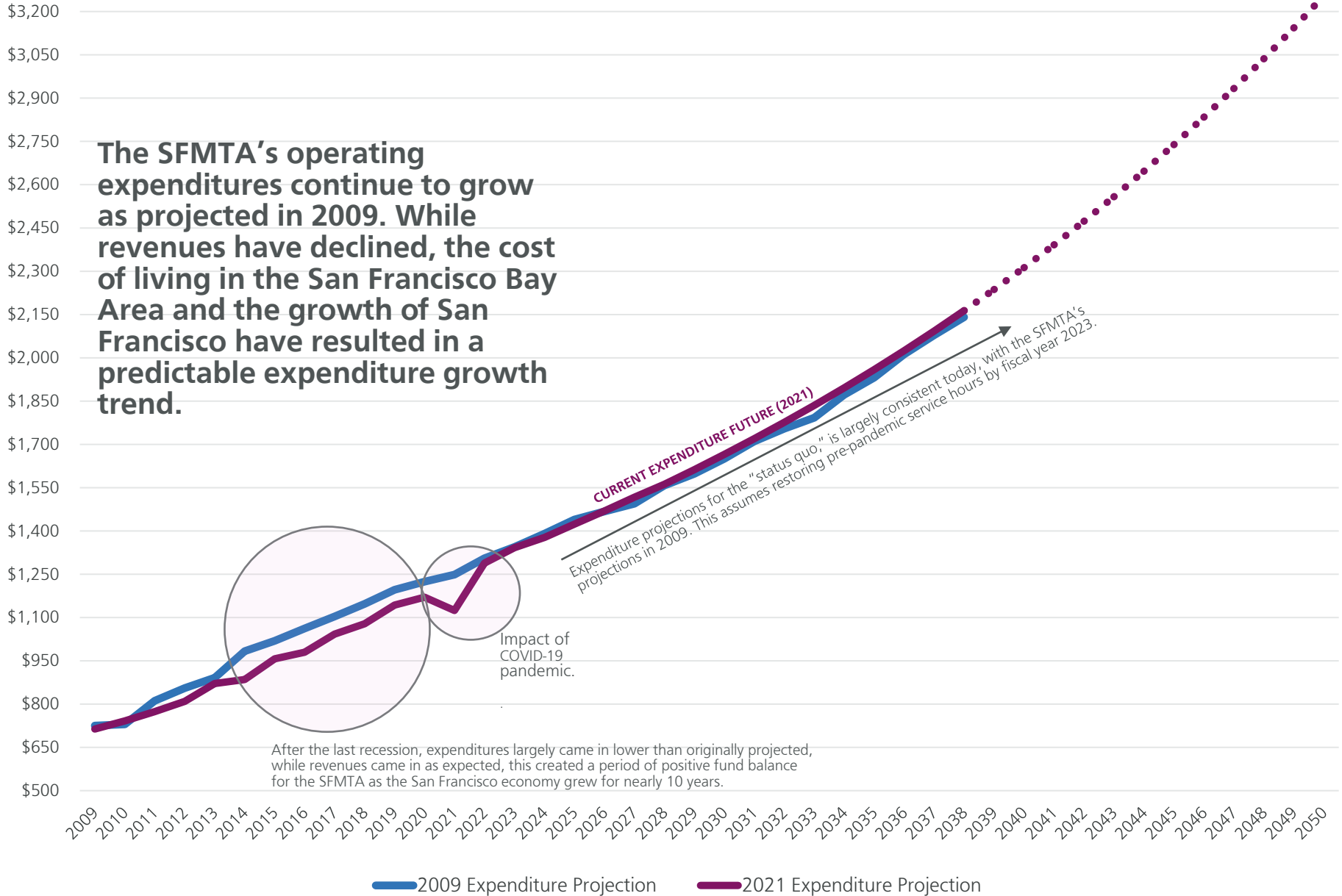
**The COVID-19 pandemic put the SFMTA on a
financial path it cannot recover from alone.**



Introduction

SFMTA Operating Expenditure Projections 2009 vs 2021

in \$millions

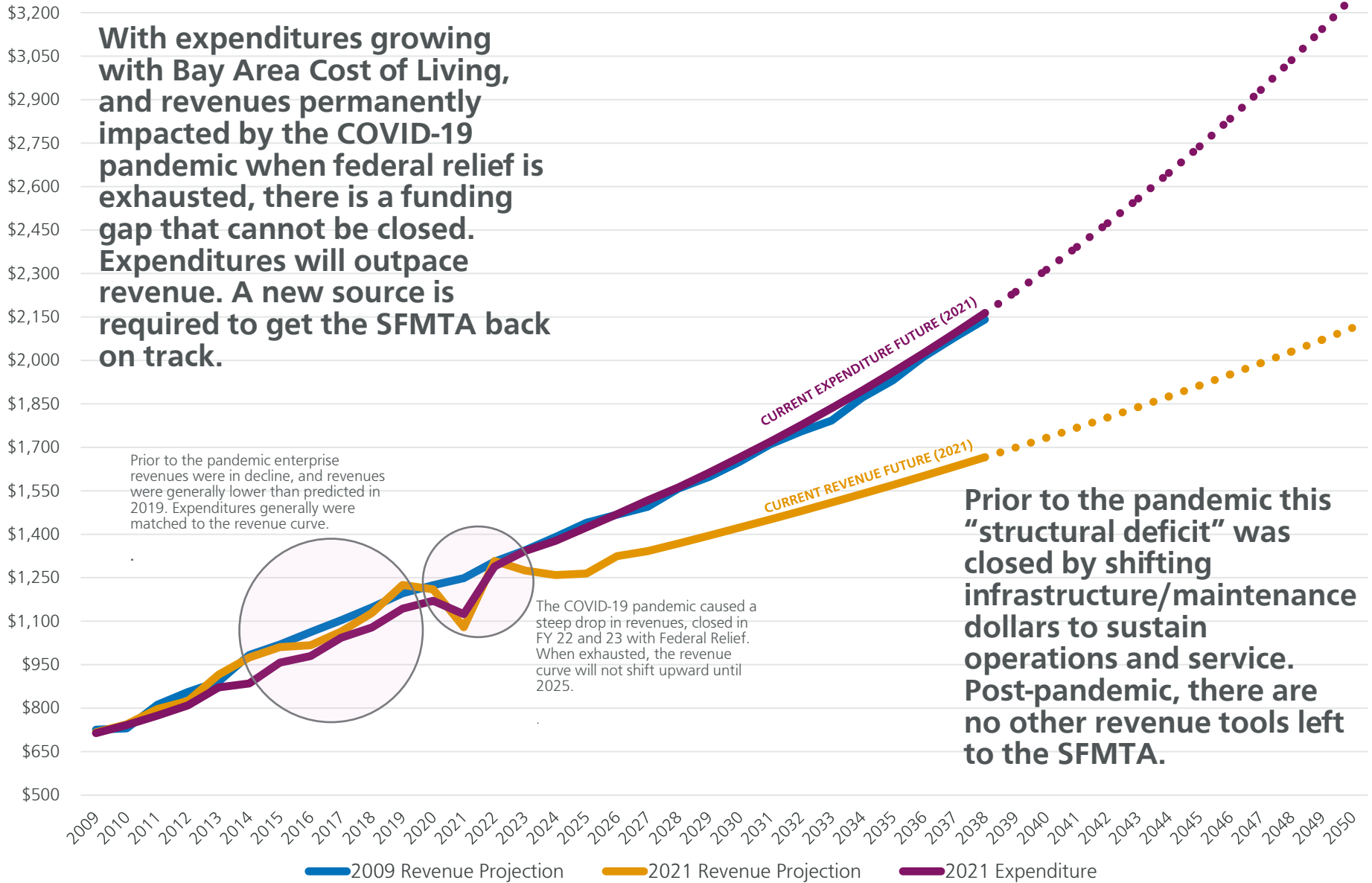


With expenditures growing with Bay Area Cost of Living, and revenues permanently impacted by the COVID-19 pandemic when federal relief is exhausted, there is a funding gap that cannot be closed. Expenditures will outpace revenue. A new source is required to get the SFMTA back on track.

Prior to the pandemic enterprise revenues were in decline, and revenues were generally lower than predicted in 2019. Expenditures generally were matched to the revenue curve.

The COVID-19 pandemic caused a steep drop in revenues, closed in FY 22 and 23 with Federal Relief. When exhausted, the revenue curve will not shift upward until 2025.

Prior to the pandemic this "structural deficit" was closed by shifting infrastructure/maintenance dollars to sustain operations and service. Post-pandemic, there are no other revenue tools left to the SFMTA.



Today's Workshop

Vision

Update on ConnectSF

- Transit Investment Strategy
- Streets and Freeways Strategy

Cost

Update on the 20-Year Capital Plan

- Capital Plan Needs – Infrastructure Costs
- Capital Investment Packages - Priorities

Action

Transportation 2050

- Community Survey & Priorities
- Analysis of Funding Gaps
- Potential Funding Measures



ConnectSF

Update on Transit Investment Strategy
Update on Streets and Freeways Strategy

connectsf.org

ConnectSF@sfgov.org

Today's Informational Presentation

- ConnectSF background
- Transit Investment Strategy
- Streets & Freeways Strategy
- Integrating the Strategies into future planning:
 - San Francisco Transportation Plan
 - Transportation Element

About ConnectSF

Phase 1 Vision

ConnectSF Vision



Phase 2 Needs

Statement of Needs

**Transit Corridors
Study**

Streets and
Freeways Study



Phase 3 Policies & Priorities

San Francisco Transportation
Plan

Transportation Element of
SF General Plan



San Francisco
County Transportation
Authority



San Francisco
Planning



**SAN
FRANCISCO**
Office of Economic and Workforce Development



Prior Work: Key Findings Recap

Challenges to Address

Create Equitable Transportation Outcomes

- Improve transportation connections for outer neighborhoods
- Improve jobs access via sustainable modes

Improve Sustainability

- Reduce emissions by shifting trips
- Further expand transit capacity
- Manage congestion

Accommodate Forecasted Growth



Transit Investment Strategy

Transit Investment Strategy Goals

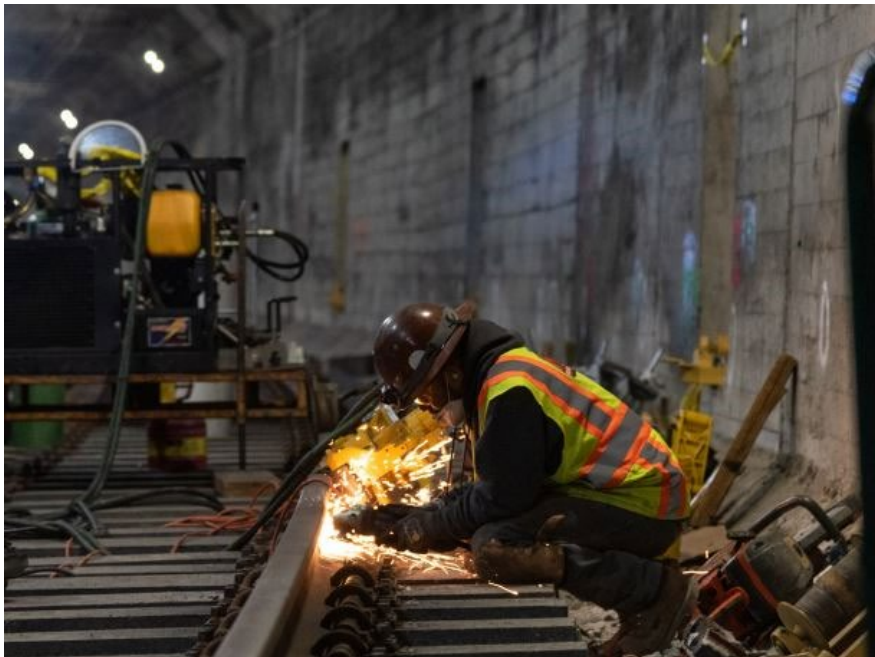
- Build upon pandemic recovery efforts
- Prioritize communities and individuals that are most dependent on transit
- Adapt to changing travel needs between neighborhoods, not just to downtown
- Address state of good repair backlog
- Continue to reduce crowding and delay
- Improve connections to the region

Key Recommendations

- 1** **Make the system work better** with maintenance and restoration
- 2** **Build a five-minute network** for reliable transit service citywide
- 3** Increase speed, reliability, and capacity for a **modern rail system**
- 4** **Build more rail** where bus service won't be able to meet demand

1

Maintain and Restore our Transit System



2

Five-Minute Network Improved Speed & Reliability



Street and signal improvements to preserve transit speed and reliability

Fast, frequent service and easy transfers throughout SF



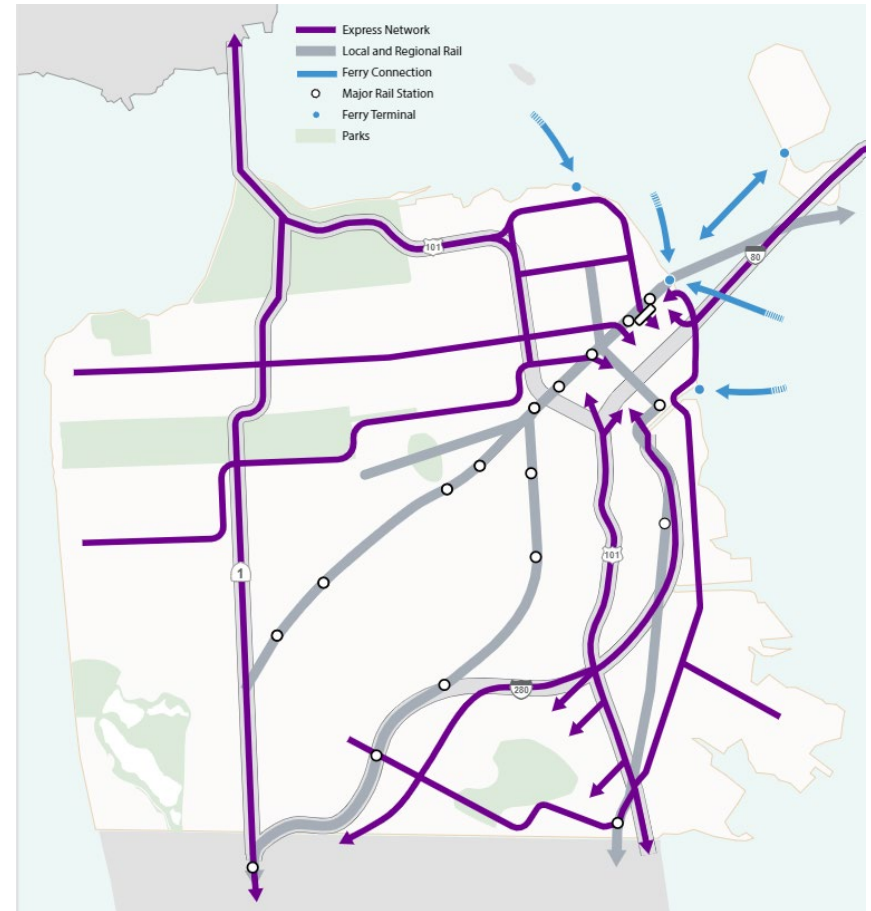
2

Regional and Local Express Service

Local and regional transit service that runs on freeways and highways

Dedicated express lanes to destinations within San Francisco and throughout the Bay Area

Complements rail and ferries



3

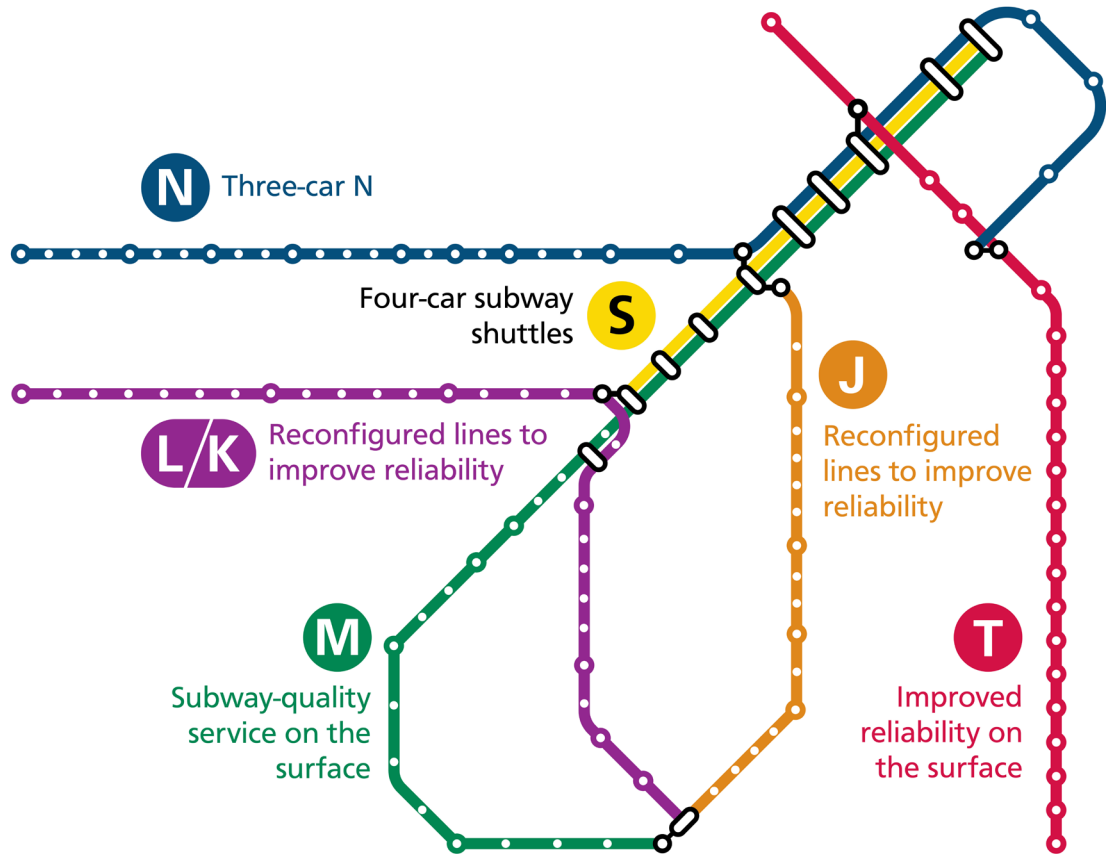
Renew and Modernize Our Rail System

Subway renewal addresses crowding and congestion

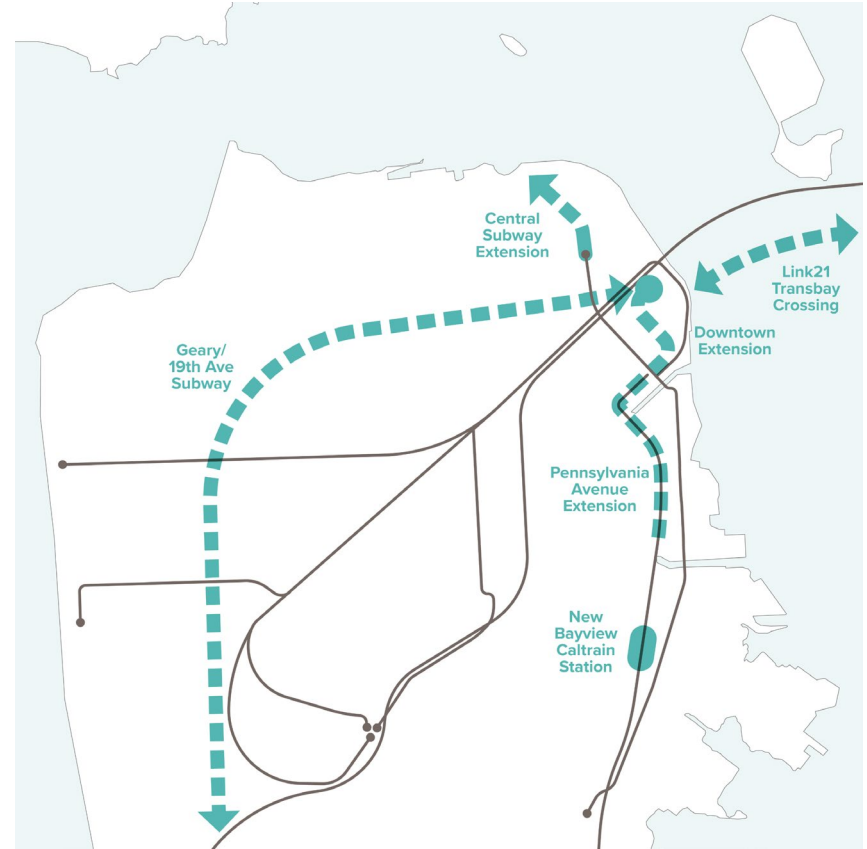
Rebuild our aging rail network

Expand critical infrastructure that keeps trains moving

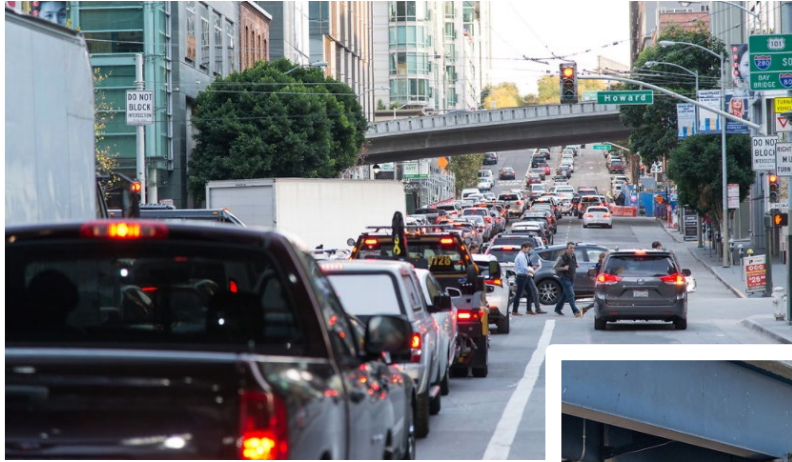
Longer trains and more reliable service



4 Build Rail to SF's Busiest Places



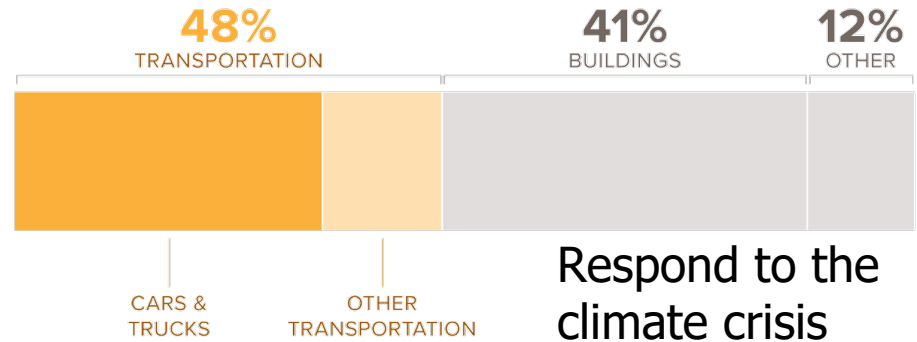
Challenges for our Streets and Freeways



We have limited street space



Freeways divide some communities, create negative impacts



Respond to the climate crisis

Key Recommendations

- 1 **Maintain and reinvest** in the current transportation system
- 2 **Prioritize transit and carpooling** on our streets and freeways
- 3 **Build a complete network** for walking and biking
- 4 **Prioritize safety** in all investments and through targeted programs
- 5 **Repair harms and reconnect communities**

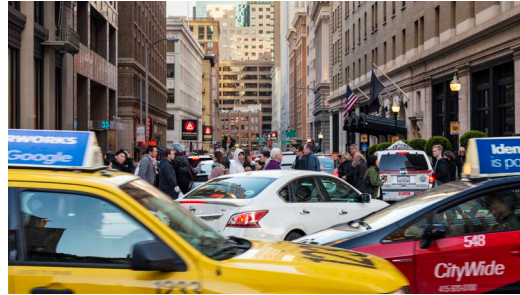
1

Maintain and Reinvest in the Current Transportation System



2

Prioritize Transit and Carpooling on our Streets & Freeways



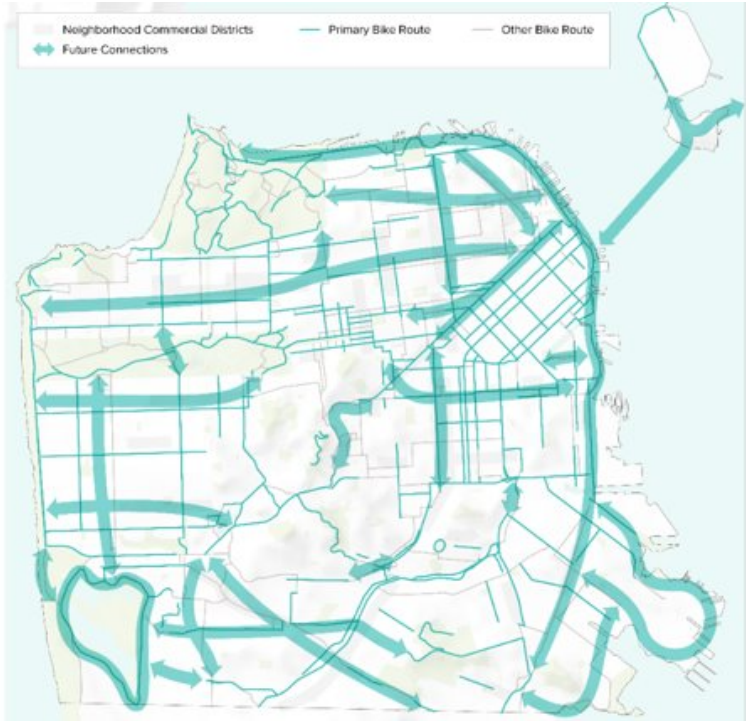
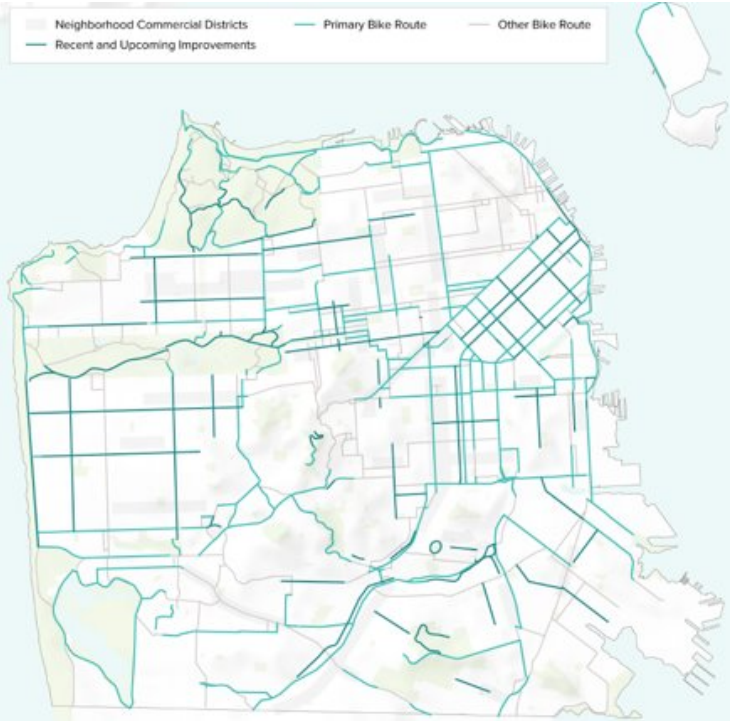
Exploring pricing to help transit and carpools move more quickly and reliably in congested areas

Lead with equity

- Robust community involvement
- Discounts for people with low-incomes
- Use revenues to improve transit

3

Build A Complete Network for Walking and Biking



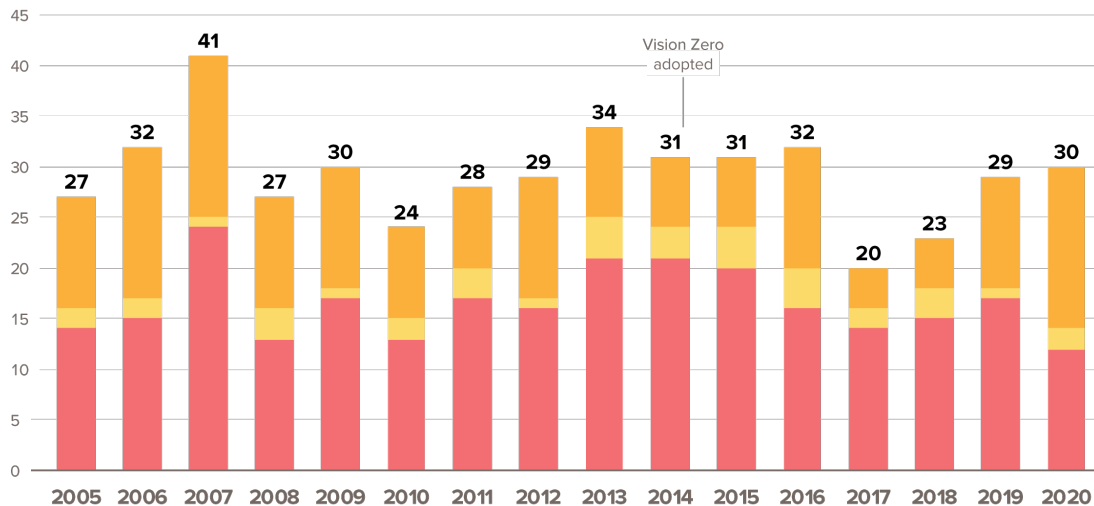
4

Prioritize Safety in all Investments and through Targeted Programs

People Killed While Walking

People Killed While Biking

People Killed in Vehicles



4

Prioritize Safety in all Investments and through Targeted Programs

Where successful and needed, make quick build permanent

Develop comprehensive speed management, focused on auto-oriented streets

Improve freeway ramps throughout the City



5 Repair Harms & Reconnect Communities

Short

Urban greening

Reduce truck impacts

Medium

New grade-separated pedestrian crossings

Long

Explore transformative projects



Outreach Completed Since Last Update

- **Late 2019-Early 2020 Transportation Needs Outreach**
 - Community workshops and individual community group presentations
- **April-July 2021 Investment Strategies Outreach**
 - Online surveys due to COVID restrictions
 - Available in four languages – English, Chinese, Spanish, and Filipino
 - Stipends offered to community groups to help us reach people of color and low income constituents
- **Additional presentations available to neighborhood and community groups as requested**



Remaining Timeline for 2021 and Early 2022

- **Summer**

- Share findings from Transit Corridor Study and Streets and Freeway Study outreach
- Further outreach and technical analysis to support San Francisco Transportation Plan (SFTP) development

- **Fall/Winter**

- Transit Corridor Study publication
- Develop SFTP constrained and vision investment scenarios
- Conduct citywide outreach
- Begin development of Transportation Element of the General Plan

What's Next?

- **San Francisco Transportation Plan**

- Long-range, multimodal investment & policy blueprint for SF
- Financially constrained plan based on reasonably expected funding sources
- Visionary investment strategy that considers how to invest new revenues

- **Transportation Element Update**

- Guides policy implementation in City codes and project approvals
- Integrates transport, land use, environmental justice, and resiliency
- Receives environmental clearance



SFMTA

2021 SFMTA 20-Year Capital Plan Update

SFMTA Board of Directors

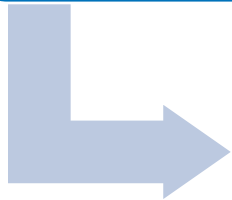
August 17, 2021



Capital Plan in Context

ConnectSF

- Vision for the Transportation System
- Supported by Federal / State / Local resources
- Includes investments in Service and Infrastructure



20-Year
Capital Plan

- 20 Years of Fiscally Unconstrained Infrastructure Needs
- Informs 5-Year Constrained Capital Improvement Program



Transportation
2050

- Community Survey & Priorities
- Analysis of Funding Gaps
- Potential Funding Measures

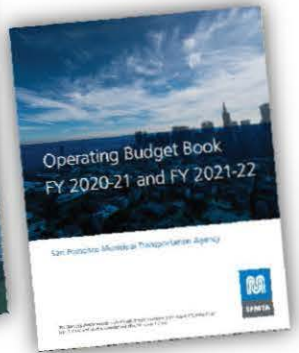
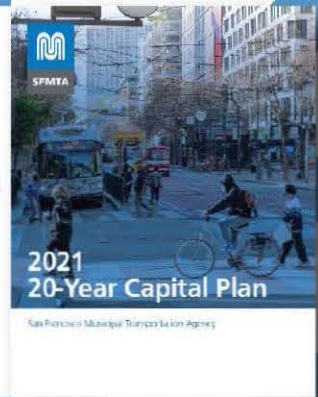
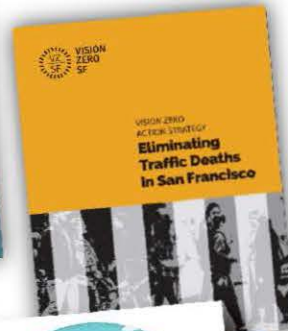
SFMTA 20-Year Capital Plan

Capital Plan Purpose

1. Provide a pathway to meet our strategic goals
2. Inform local and regional plans
3. Help coordinate the implementation of SFMTA plans, programs and strategies
4. Inform development of the 5-year CIP
5. Create accountability and build trust

\$31.3B of identified Capital Needs over 20 years, or \$1.6B annually

SFMTA's average annual capital budget for the past five years is \$732M



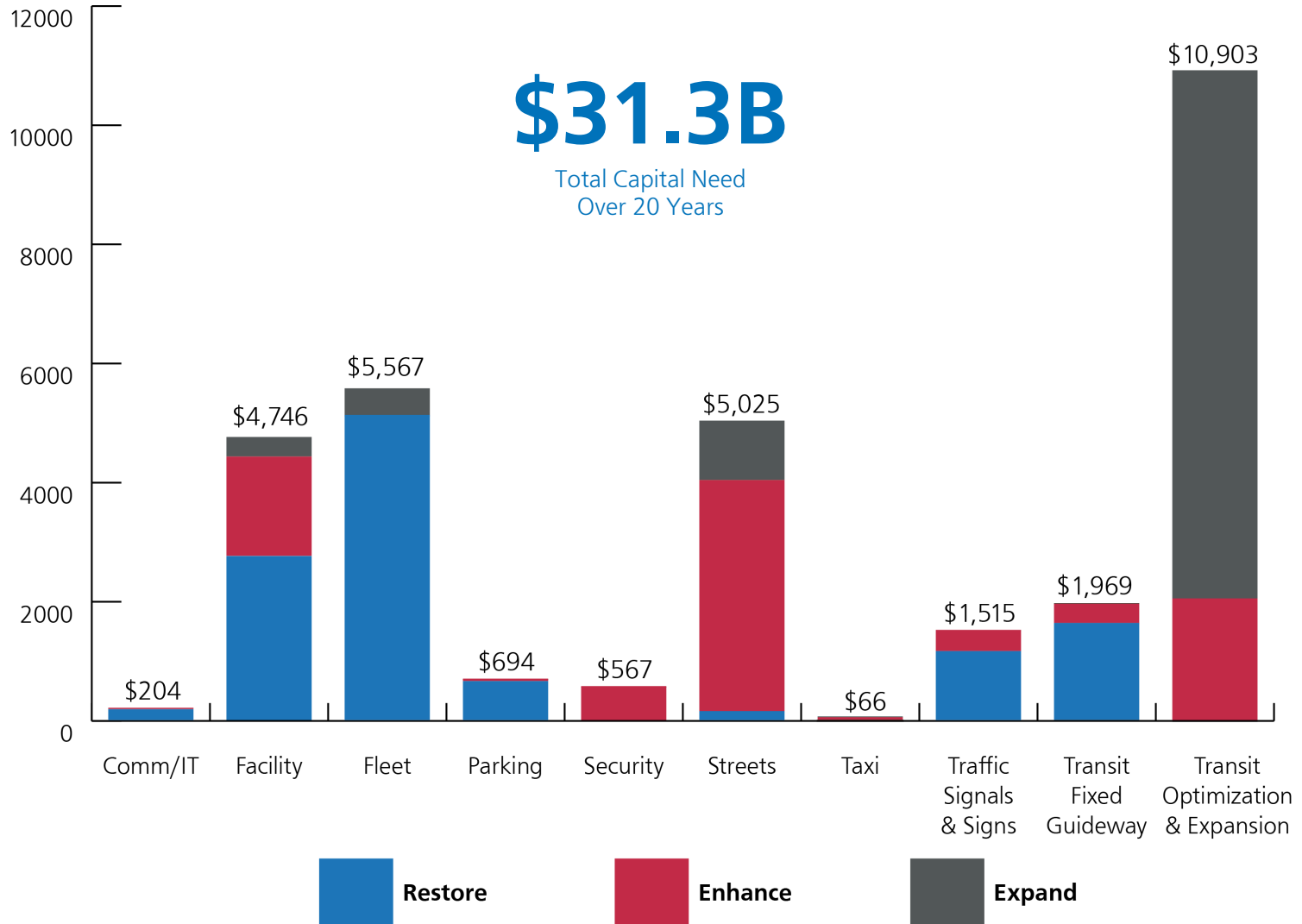
PROGRAM	2020 Total Capital Needs Update
Communications & IT	\$ 217,400,000
Facility	\$ 4,274,100,000
Fleet	\$ 5,567,188,000
Fleet	\$ 198,768,000
Parking	\$ 550,900,000
Security	\$ 650,000,000
Street	\$ 15,100,000
Street	\$ 1,908,968,850
Street	\$ 108,222,000
Station	\$ 31,059,046,850

Revenue Measure



Capital Needs by Capital Program

(In \$ Millions)



Capital Investment Packages



MAKE STREETS SAFER



MAKE THE TRANSPORTATION SYSTEM UNIVERSALLY ACCESSIBLE



MAKE THE TRANSPORTATION SYSTEM WORK

- FACILITIES MODERNIZATION
- TRANSIT MODERNIZATION
- SYSTEM ELECTRIFICATION
- WALKING AND BIKING NETWORK



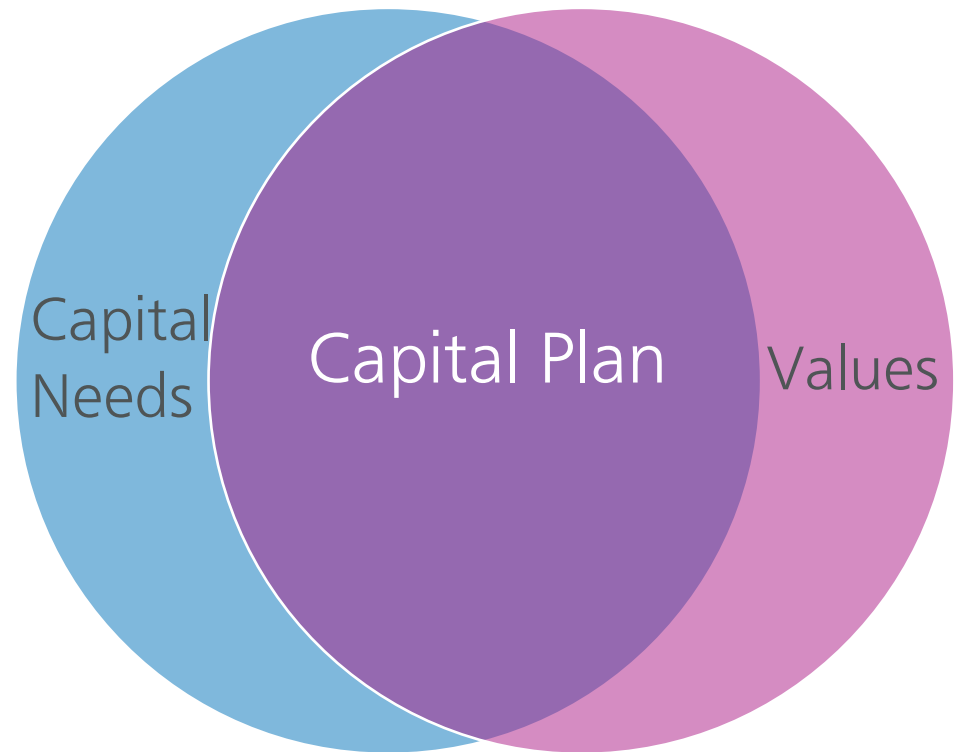
RENEW AND MODERNIZE THE RAIL SYSTEM



BUILD THE FIVE-MINUTE NETWORK AND EXPAND THE RAIL NETWORK

Next Steps

- Assess Capital Needs based on Strategic Plan
- Incorporate Capital Needs assessment into Capital Plan
- Seek SFMTA Board approval of full Capital Plan



Questions?

San Francisco

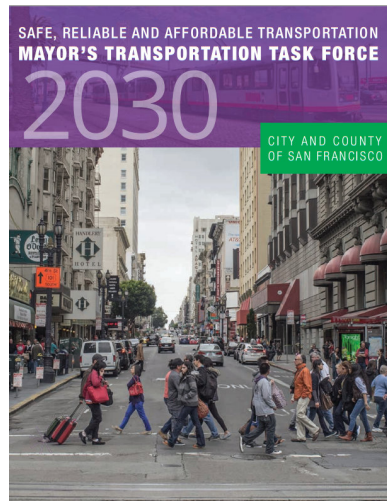
TRANSPORTATION 2050



SFMTA Board of Directors
August 2021 Update



Transportation 2050 (T2050) builds upon the work done by the two prior Transportation Task Forces.



2013



2018

Reference: [Transportation 2030 Report](#)

Reference: [Transportation 2045 Report](#)

Transportation 2045

(January 2018)



“It is with some measure of urgency that we present this report on the critical funding needs of San Francisco’s transportation systems from now through the year 2045. Throughout the Task Force process, nearly 60 representatives of the city’s neighborhoods, businesses, civic organizations, advocacy groups and agency staff came together to grapple with difficult questions. This report updates and builds on previous analysis, with a list of potential funding sources presented in the context of a particularly tenuous federal landscape for infrastructure funding. Task Force members have outlined both investments and revenue priorities through an equity lens, and tasked city leaders to take action today to secure the \$100 million annual contribution to our overall transportation need.”



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Sources getting the highest support among task force members in 2018 ranged from \$83 – \$353 m/annually.

Source	Low Range	High Range
Sales Tax	\$50 m/yr	\$150 m/yr
Gross Receipts: Commercial Property Rent Tax Increase	\$13 m/yr	\$100 m/yr
Vehicle License Fee (VLF)	\$12 m/yr	\$73 m/yr
Gross Receipts: Platform/Gig Economy Tax	\$8 m/yr	\$30 m/yr

Reference: [Transportation 2045 Report](#)



We last considered T2050 at the SFMTA Board Workshop in February 2021.

Solicit feedback from the public on priorities:

SFMTA Community Survey ([June 15, 2021](#))

Report Backs:

Transit Service Restoration ([April 20, 2021](#), [July 20, 2021](#))

State of Good Repair Report ([July 20, 2021](#))

Vision Zero Action Strategy ([July 20, 2021](#))

SFMTA 20-Year Capital Plan (Today)

ConnectSF Transit Investment Strategy (Today)

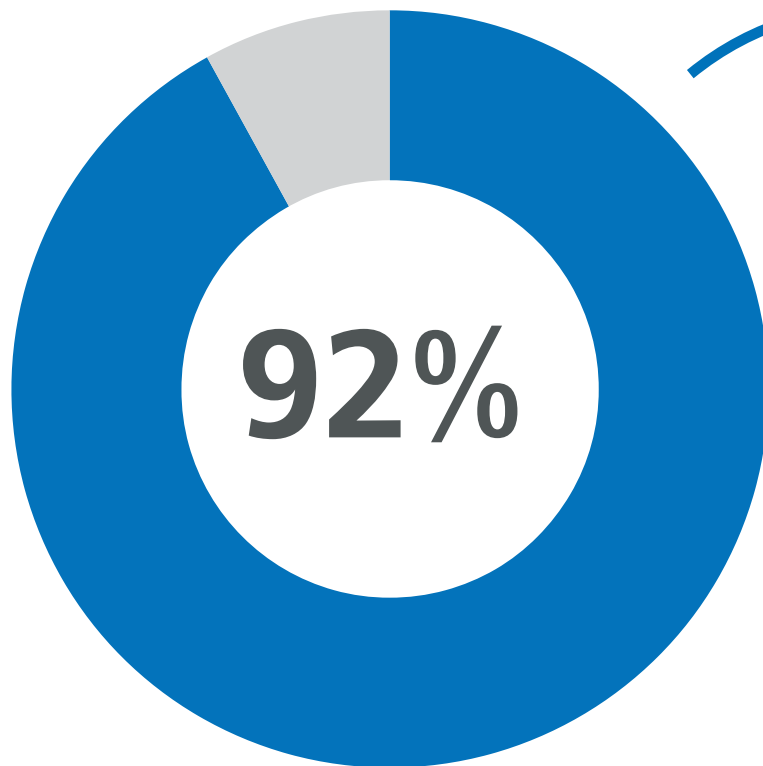
ConnectSF Streets and Freeway Strategy (Today)

We asked, you answered. (2021 Community Survey)

Reference: [2021 SFMTA Community Survey](#)



A recent citywide survey has made it clear: Muni is a vital part of the community



of respondents think
“a vital part of the community”
describes Muni well

Source: San Francisco citywide survey conducted by FM3, April 2021

To continue being a vital part of the community, you've told us your priorities are:



**Investing
Equitably**



**Fast and
Convenient Transit**



**More Repairs and
Maintenance**

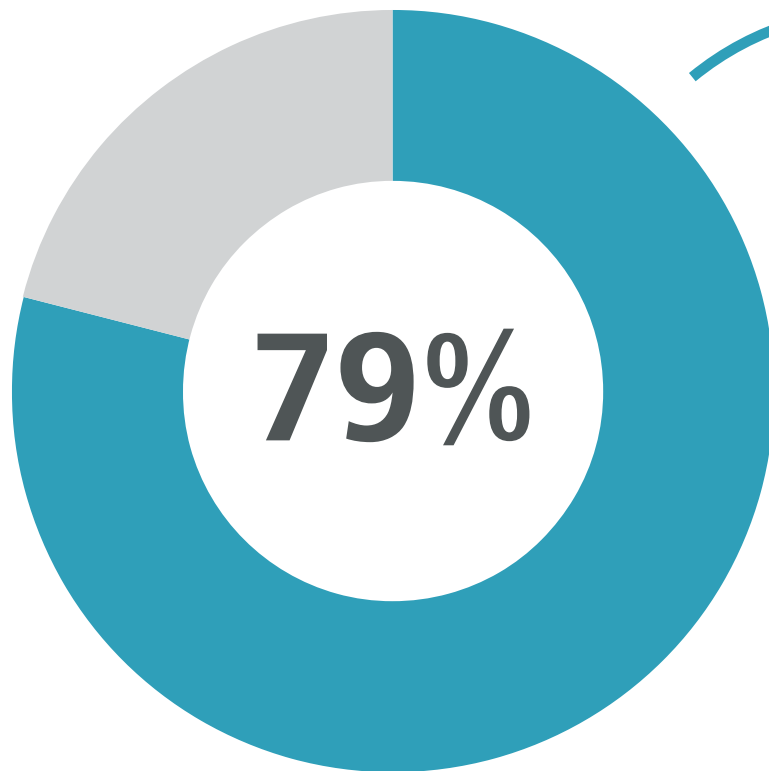


**Improving Safety
and Access**

Investing Equitably



A majority of survey respondents say it is “very important” or “extremely important” to ...



Increase and improve Muni service for the communities most dependent on transit

Source: San Francisco citywide survey conducted by FM3, April 2021

And really, investing equitably is part of everything we do at SFMTA



Investing Equitably



**Fast and
Convenient Transit**



**More Repairs
and Maintenance**

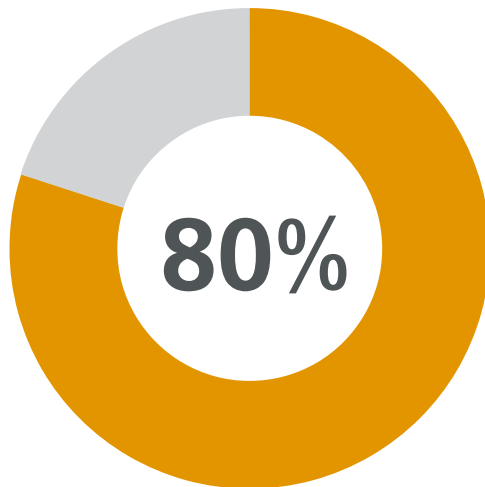


**Improving Safety
and Access**

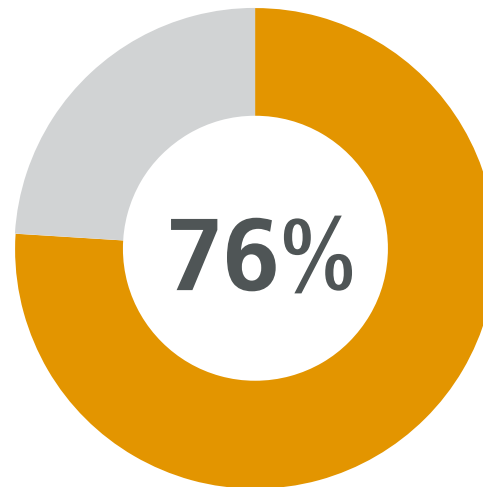
Fast and Convenient Transit



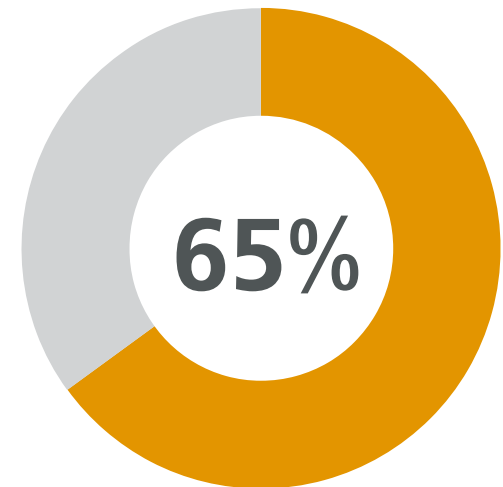
A majority of survey respondents say it is “very important” or “extremely important” to ...



Provide quick, convenient transit access to all parts of San Francisco



Reduce delays to make Muni more reliable



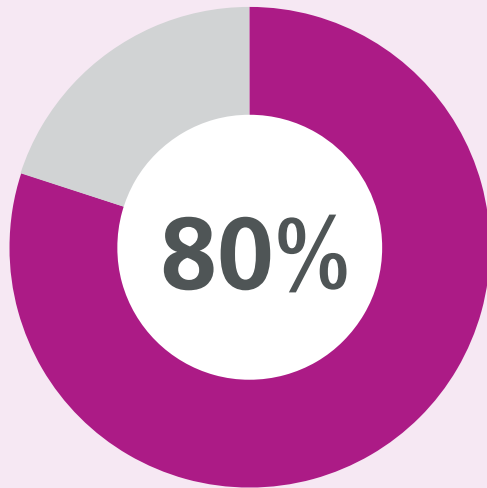
Reduce crowding on Muni

Source: San Francisco citywide survey conducted by FM3, April 2021

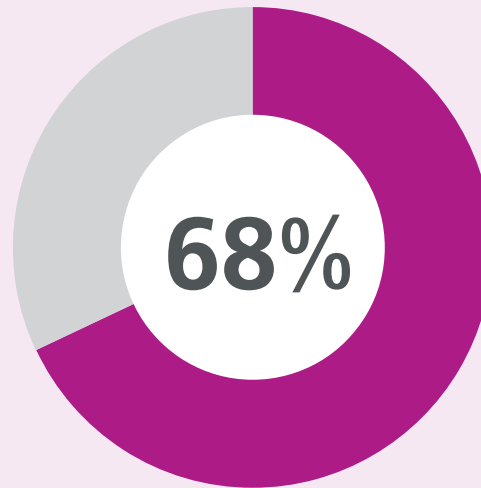
More Repairs and Maintenance



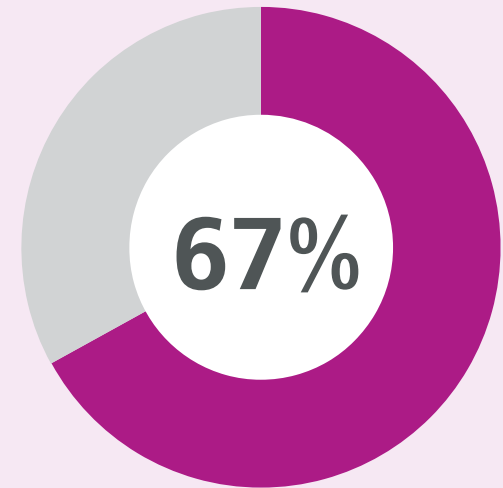
A majority of survey respondents say it is “very important” or “extremely important” to ...



Repair and maintain Muni equipment and facilities to ensure vehicles’ safety, frequency, and reliability



Address the backlog of maintenance work



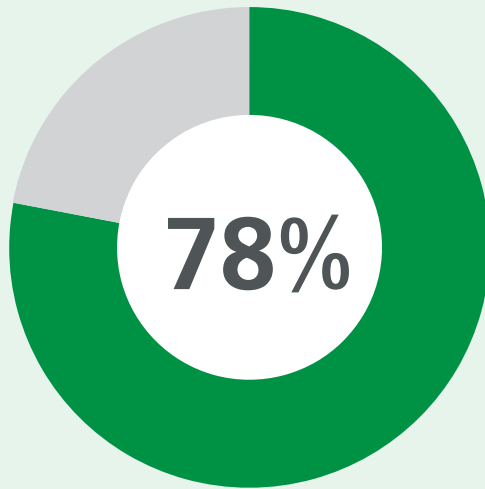
Rebuild San Francisco’s aging rail network

Source: San Francisco citywide survey conducted by FM3, April 2021

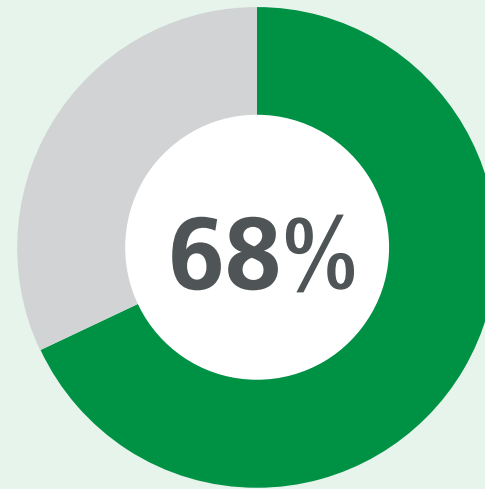
Improving Safety and Access



A majority of survey respondents say it is “very important” or “extremely important” to ...



Ensure Muni service is inclusive and accessible to all



Make street safety improvements for walking

Source: San Francisco citywide survey conducted by FM3, April 2021

We couldn't agree more.

Here's how we're focusing on your priorities and vision



INVESTING EQUITABLY



Fast and Convenient Transit

1. Create a Five-Minute Network
2. Expand the rail network



More Repairs and Maintenance

1. Make the transportation system work
2. Modernize the rail and subway system



Improving Safety and Access

1. Make streets safer
2. Make the transportation system universally accessible

Here are your priorities ... and their cost over 30-years to 2050



INVESTING EQUITABLY



Fast and
Convenient
Transit



More Repairs
and
Maintenance



Improving
Safety
and Access

\$111.3B

What the vision will
require us to spend over
30-years

\$63.4B

We will spend over the
next 30-years

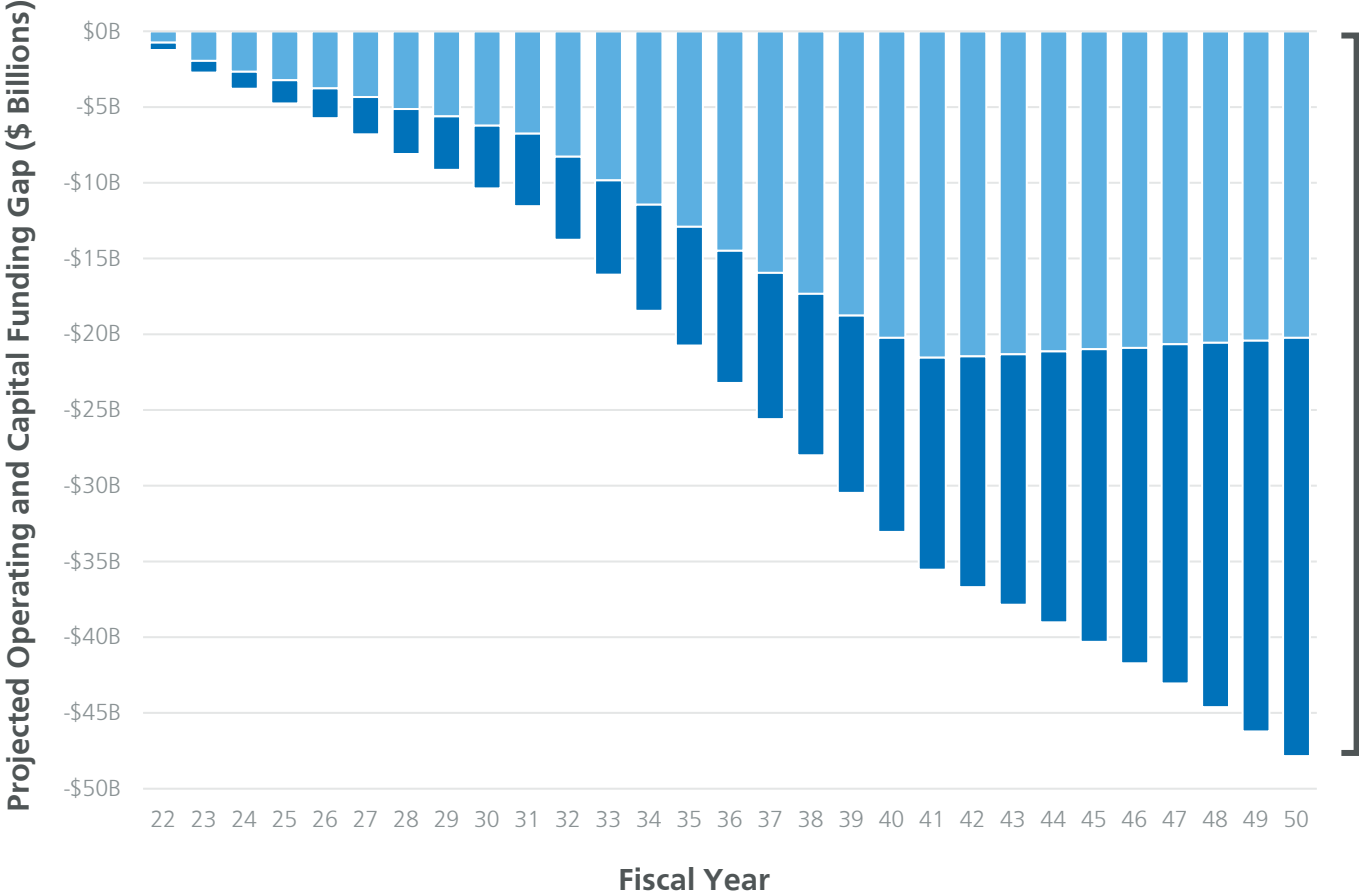
57% funded

(\$47.8B)

T2050 Funding Gap
Cumulative total over 30-years

43% funding gap

Achieving the vision isn't currently possible because our costs would be much higher than our revenues

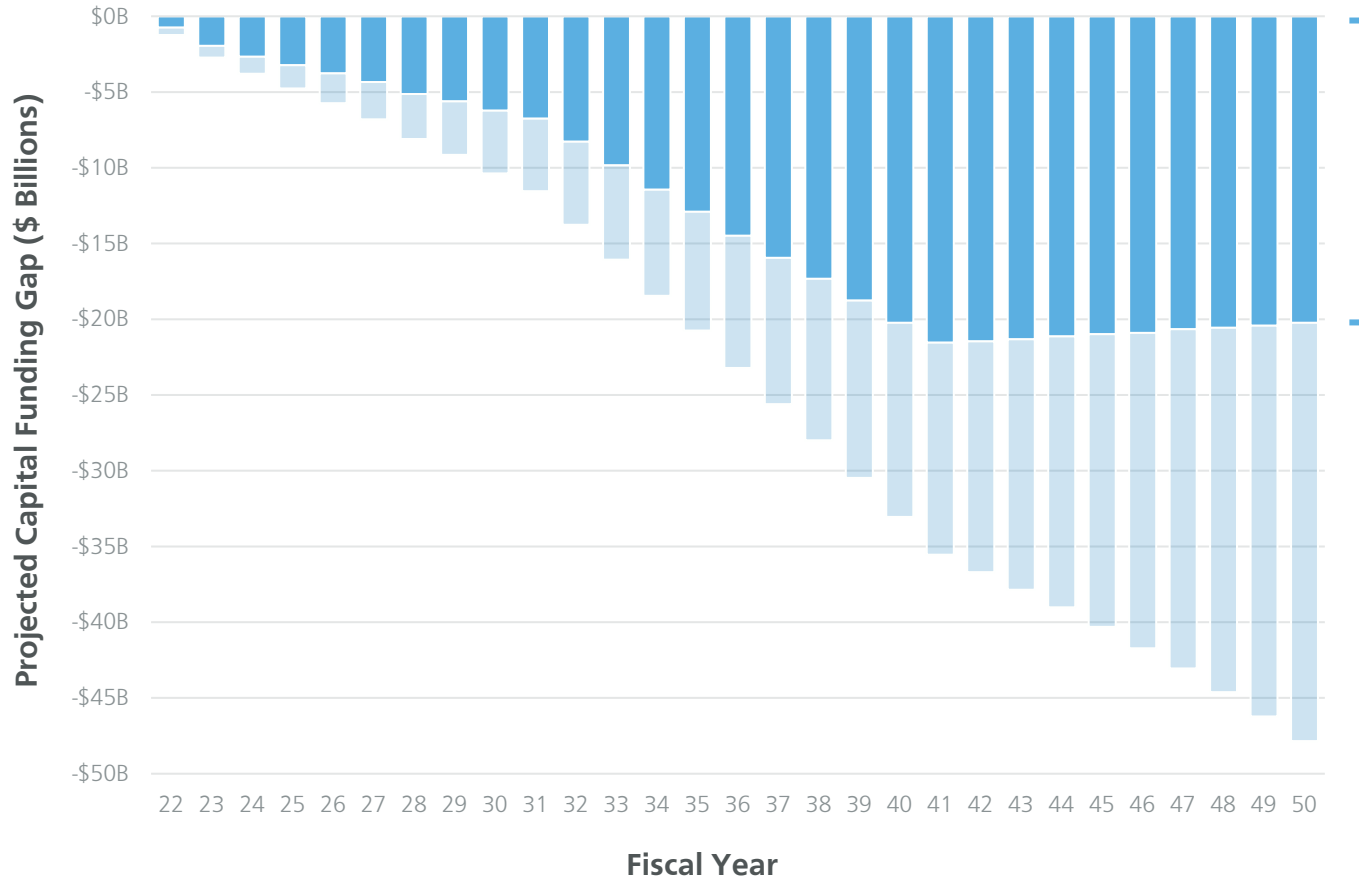


\$1.6B

Average annual funding gap over the next 30 years, leading to a cumulative total gap of \$47B



This includes a gap in funding for capital investments, like vehicles and infrastructure ...



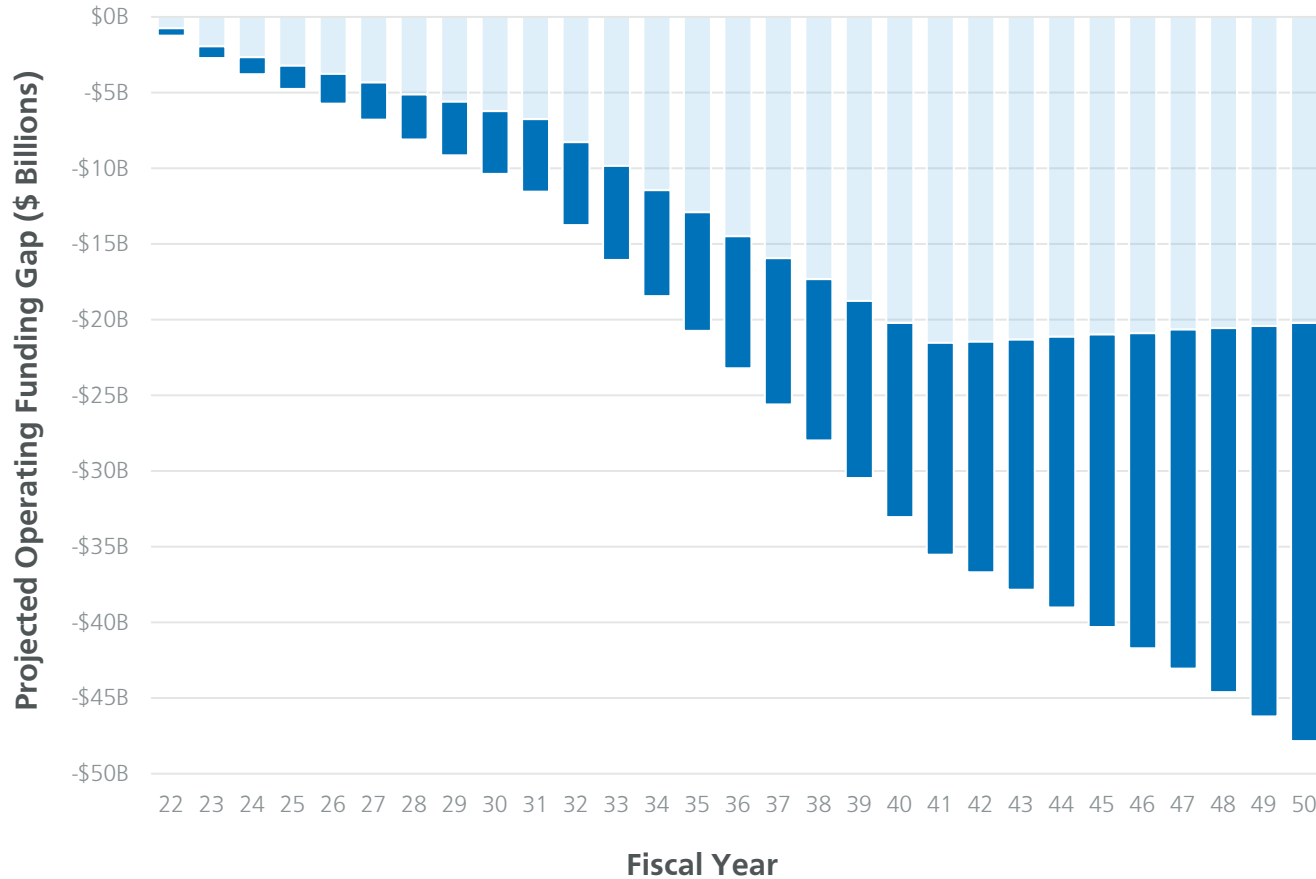
\$674M

Average Annual Capital Funding Gap

To keep the system running smoothly and expand it based on your priorities



... and a gap in funding for operating expenses: running buses and trains



\$921 M
Average Annual
Operating
Funding Gap

To run trains and buses in line with your priorities



**However, 2050 is a
long time from now.**

**What if we focus on
the next 10 years?**

Based on your priorities, we have created three potential futures.

System in a state of good repair; maintenance done on-time; pre-pandemic service; 20% service increase; 5-minute network implemented; streets are safer and accessible to all.

System in a state of good repair. Maintenance and asset replacement done on-time. Return to pre-pandemic service in 2023. System is not expanded.

A mixture of core infrastructure, enhancements and expansion. Return to pre-pandemic service in 2023. Infrastructure replacement backlog does not grow.

Implementing SF Vision



Focus on State of Good Repair



Balanced Approach



Over the next 10 years, the gap
will be \$1.04B per year on average



\$1.04B/Yr Gap

Implementing
SF Vision



Even with a balanced approach, there's still a projected funding gap of \$300M per year over the next 10 years

\$1.04B/Yr Gap

Implementing SF Vision

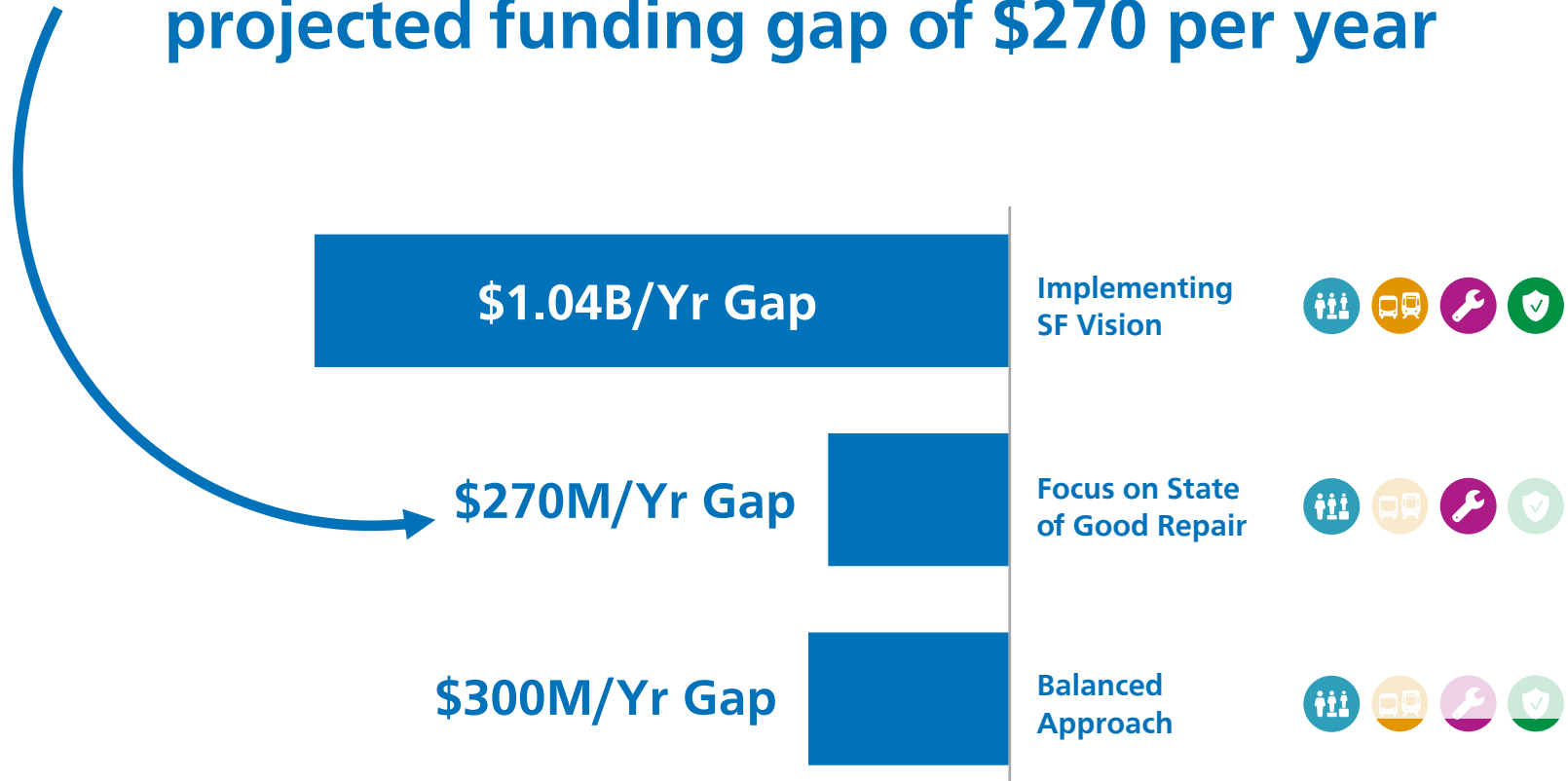


\$300M /Yr Gap

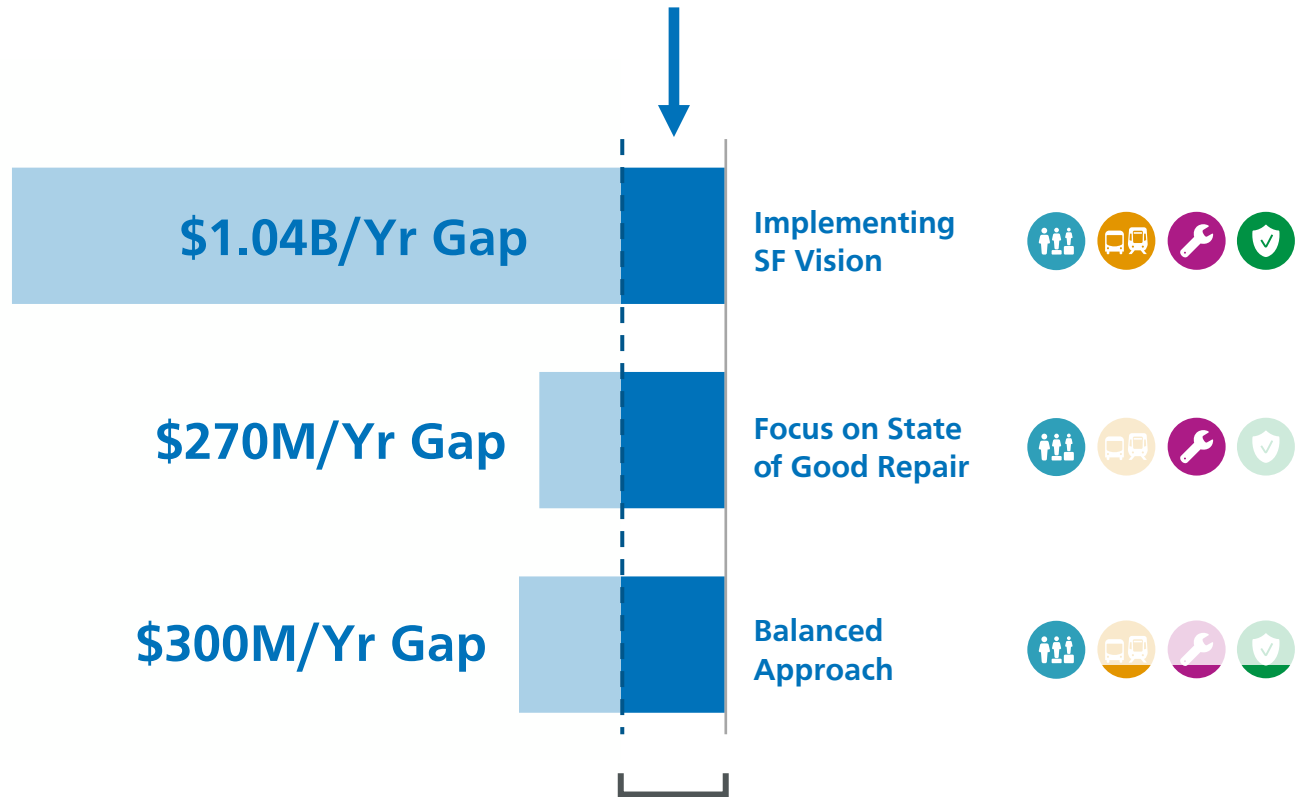
Balanced Approach



If we focus instead primarily on the State of Good Repair backlog, we end up with a 10-year projected funding gap of \$270 per year



We've identified some new potential revenue sources, which combined could amount to \$149M per year



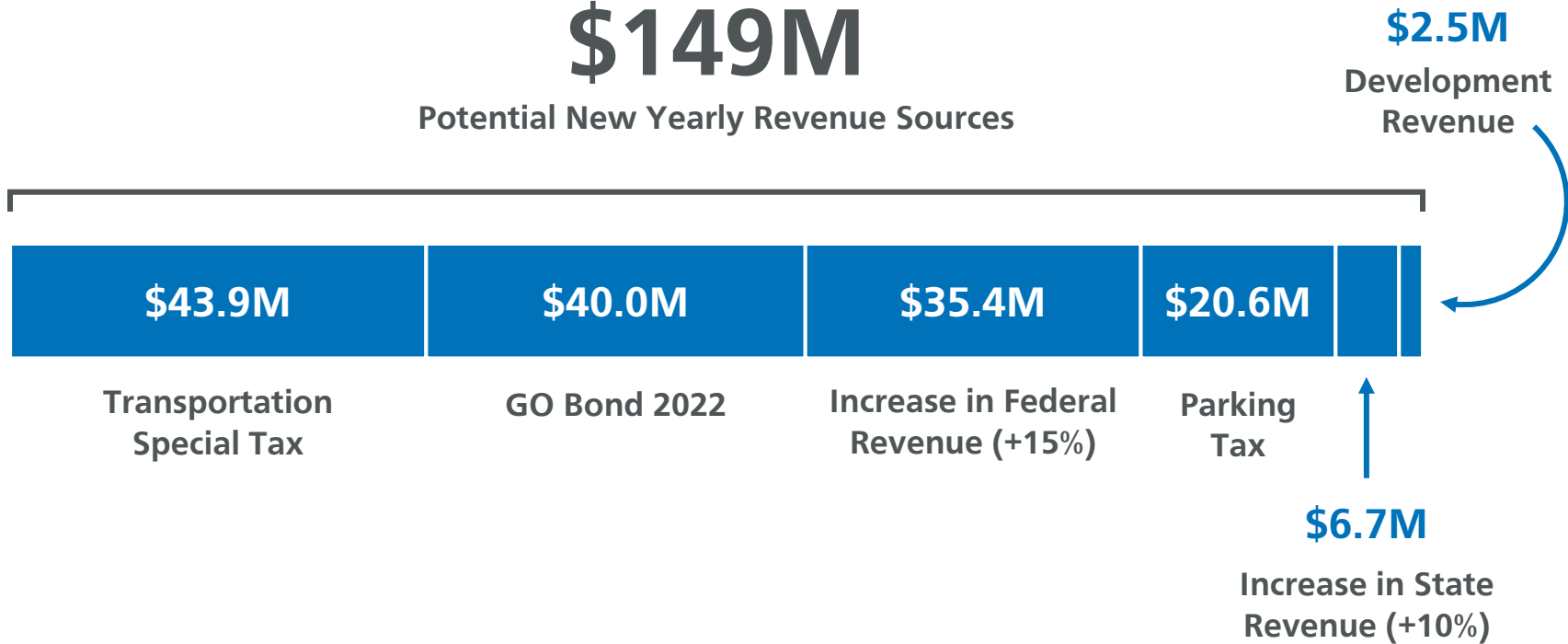
\$149M

Potential New Yearly Revenue Sources

These potential new revenue sources are:

\$149M

Potential New Yearly Revenue Sources



These potential new revenue sources are:

Source	Benefits	Short Term \$/yr	Long Term \$/yr
Transportation Special Tax	Dedicated tax for transportation, providing a predictable stable source for transit service and maintenance. May be bonded against for near-term capital infrastructure investment, reducing long term maintenance.	\$50 m/yr	\$60-70/yr
Parking Tax	Increase existing San Francisco Parking Tax with opportunities to reform or modify for transportation infrastructure, transit service and maintenance.	\$20m/yr	Declining
CCSF General Obligation Bond Program	The SFMTA as part of the City GO Bond Program has allowed for critical infrastructure investment, safety improvements and transit reliability investments – reducing the cost of operations and long-term maintenance.	\$40 m/yr	\$50 m/yr
Federal Grants	The current proposed bi-partisan Infrastructure Bill provides opportunities for increased Federal support for up to 5-years for transportation infrastructure and maintenance campaigns.	\$35 m/yr	\$40 m/yr
State Grants	The current State budget designates significant additional dollars to transportation available through grants for transportation infrastructure.	\$7 m/yr	Unknown
Development Revenue	Development of SFMTA properties provide significant long-term opportunities to produce revenues that can go directly toward transportation infrastructure, transit service and maintenance.	\$5 m/yr	\$25-35 m/yr

With these new sources, we can fund nearly 2/3 of our vision for San Francisco over 30-years.



INVESTING EQUITABLY



Fast and
Convenient
Transit



More Repairs
and
Maintenance



Improving
Safety
and Access

\$111.3B

What the vision will
require us to spend over
30-years

\$70.2B

We will spend over the
next 30-years

**63% funded
with new
funding sources**

(\$41.0B)

T2050 Funding Gap
Cumulative total over 30-years

37% funding gap

And over 2/3rd of the vision... over 10 years



INVESTING
EQUITABLY



Fast and
Convenient
Transit



More Repairs
and
Maintenance



Improving
Safety
and Access

\$27.8B

What the vision will
require us to spend over
10-years

\$18.8B

We will spend over the
next 10-years (all sources).

**68% funded
with new
funding sources**

(\$9.0B)

T2050 Funding Gap
Cumulative total over 10-years

32% funding gap

But we can still accomplish a lot ...

By prioritizing near-term, high-impact investments



Thank You.

San Francisco

TRANSPORTATION 2050



Appendix.

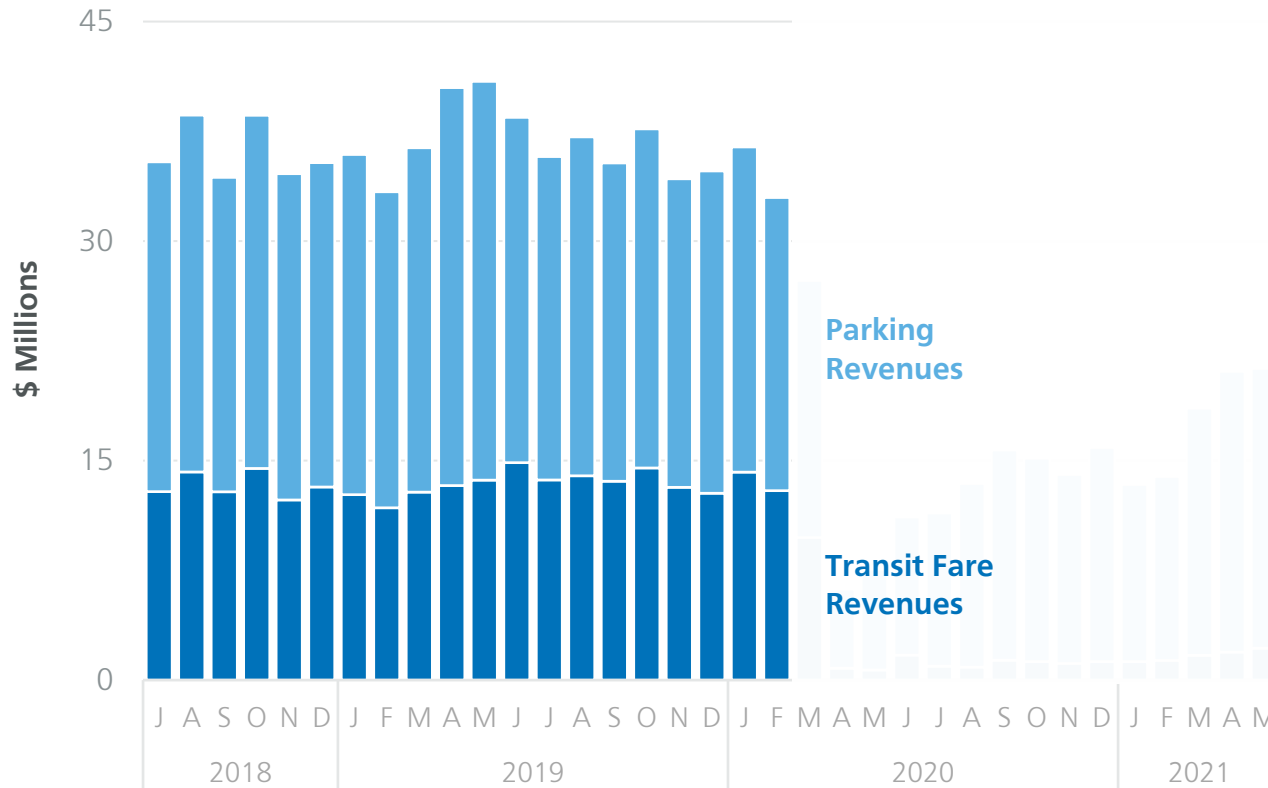
San Francisco

TRANSPORTATION 2050

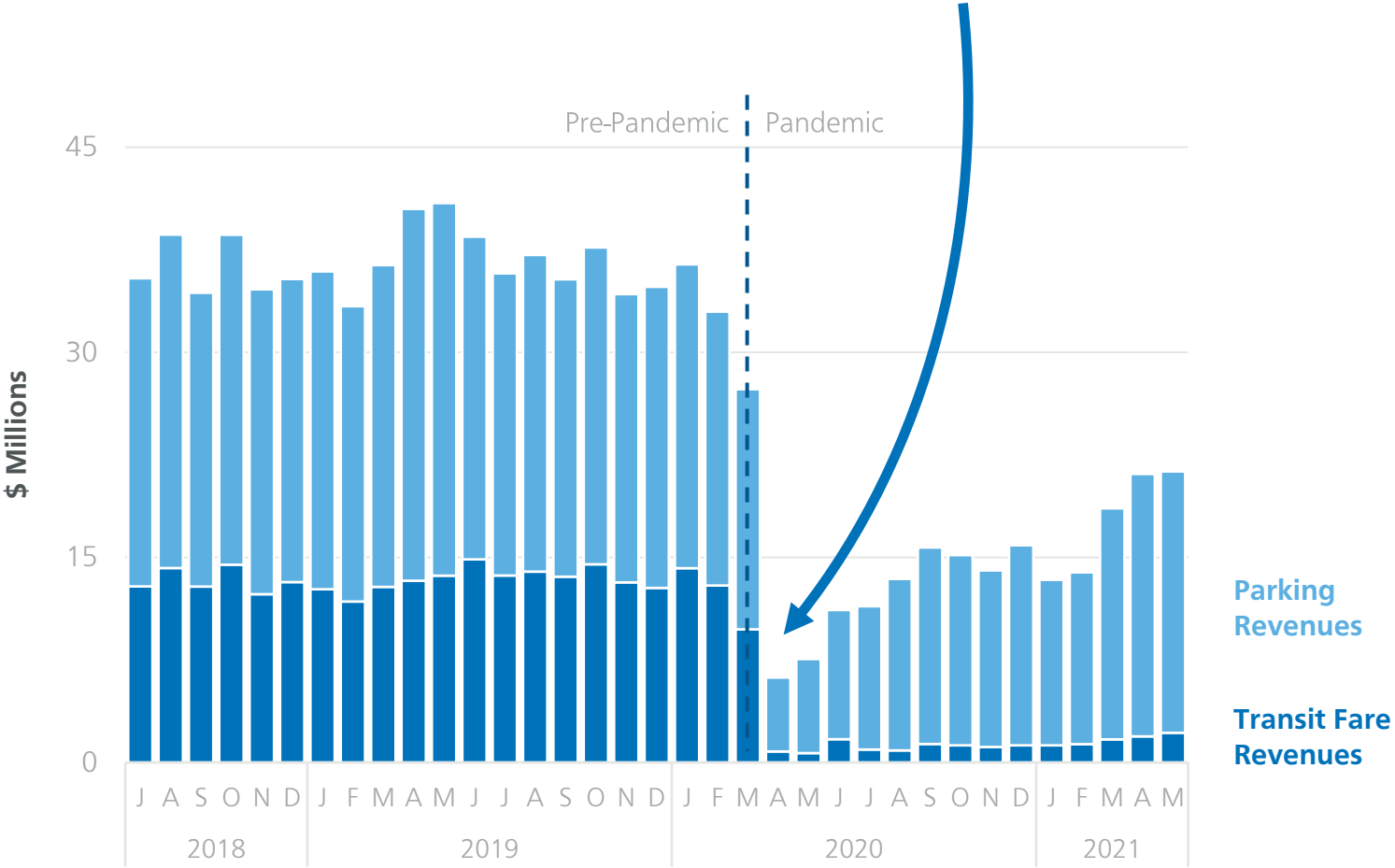


Impacts of COVID-19 / FY19/20

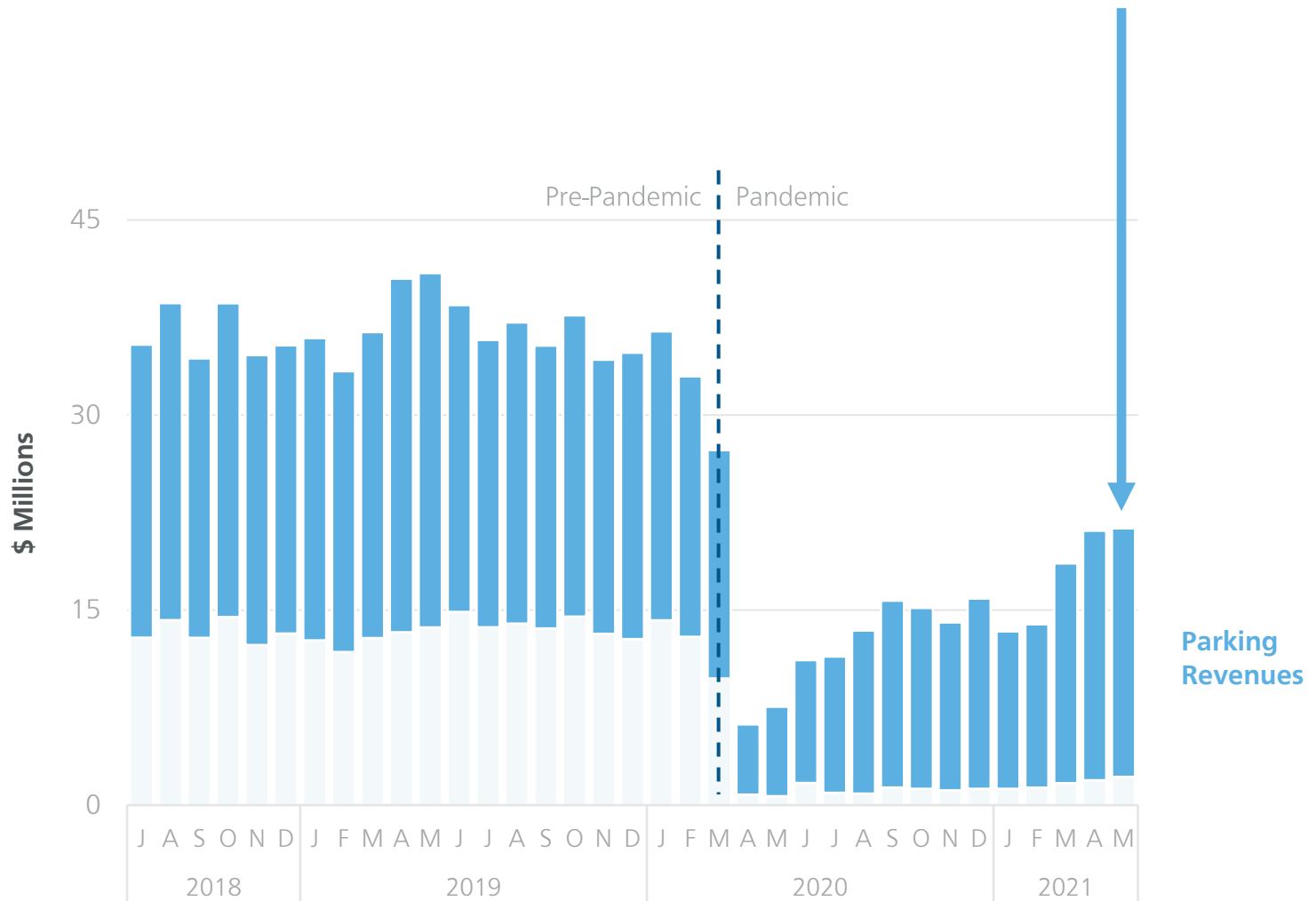
Parking and transit revenues were relatively flat in the months leading up to February 2020



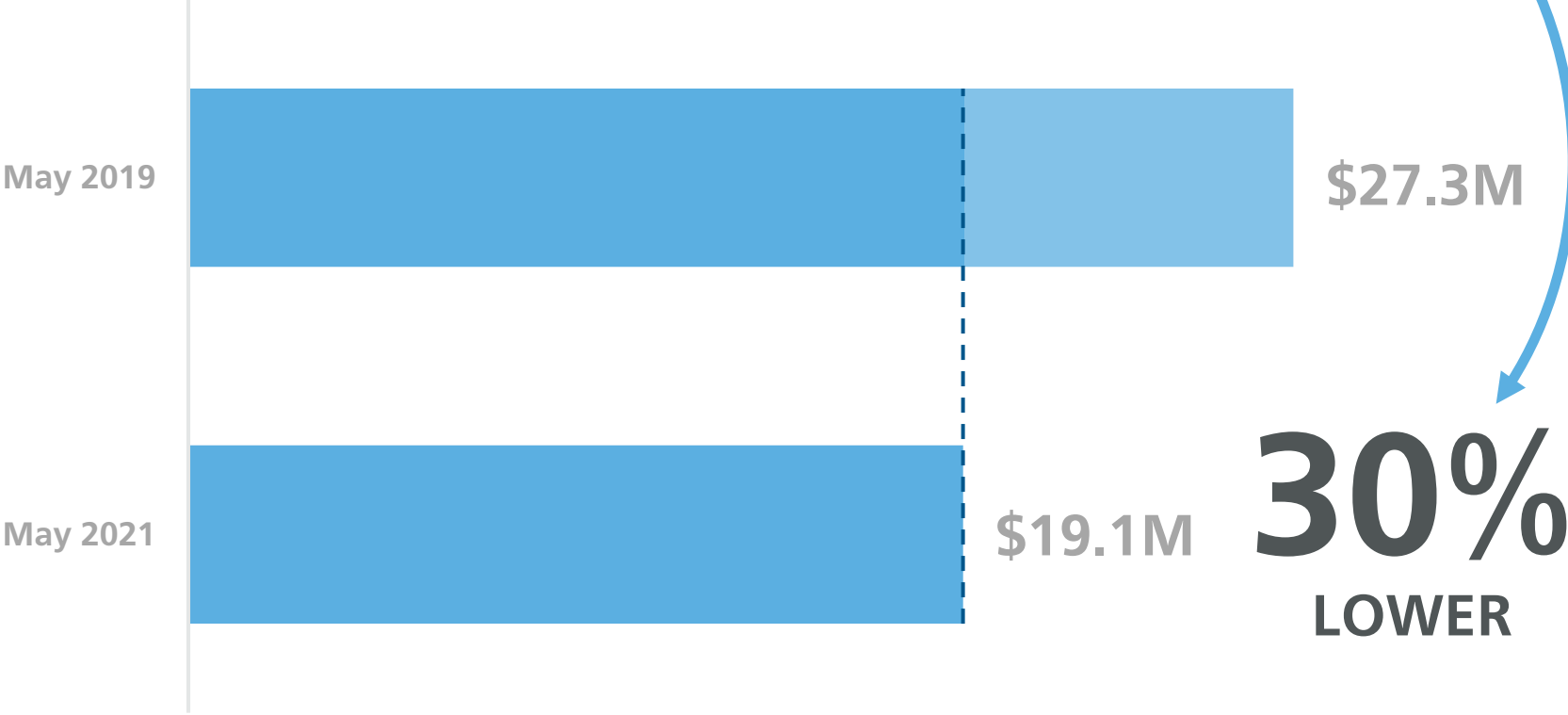
But after March 2020, the pandemic cratered both revenue sources



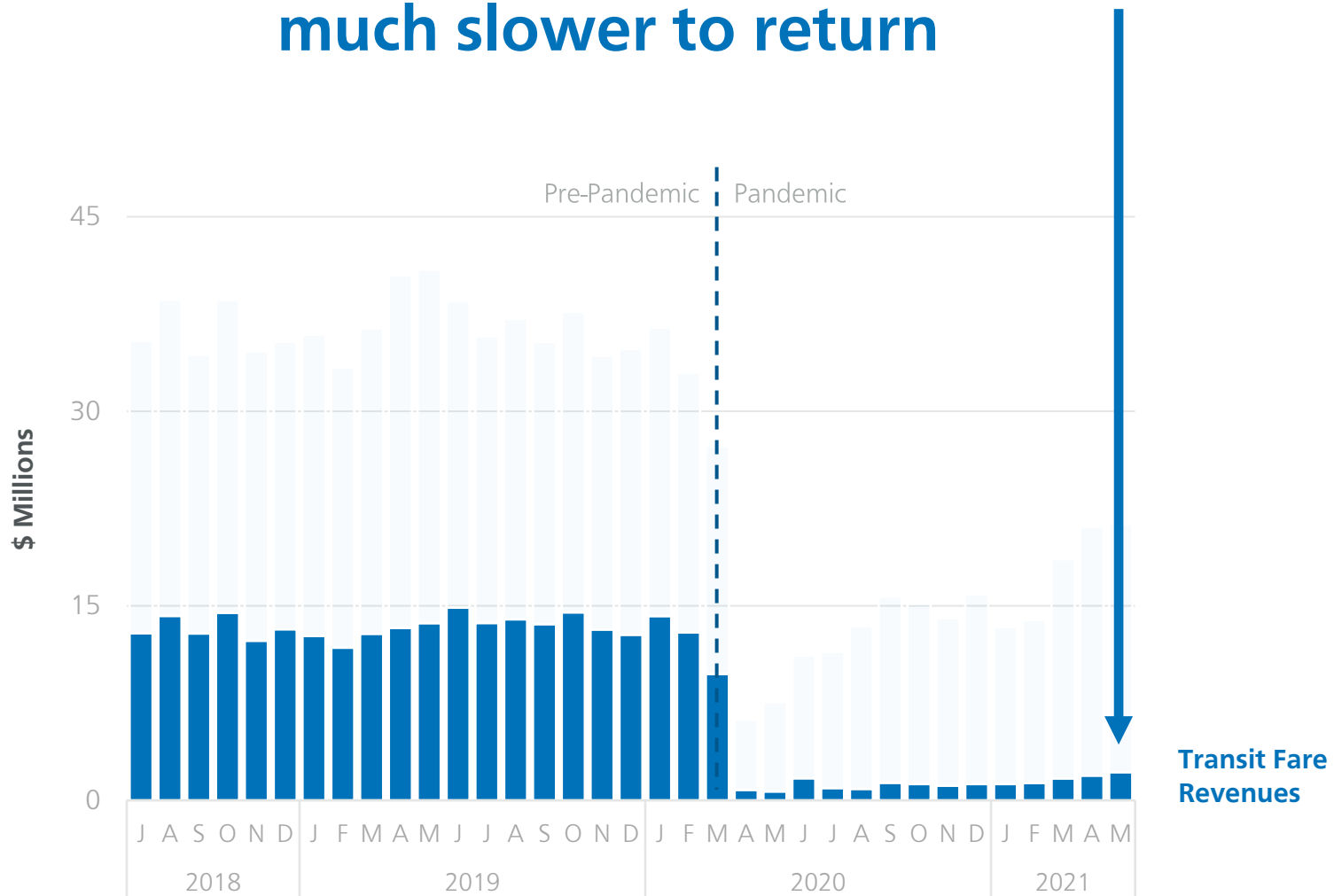
Parking revenue has partly bounced back



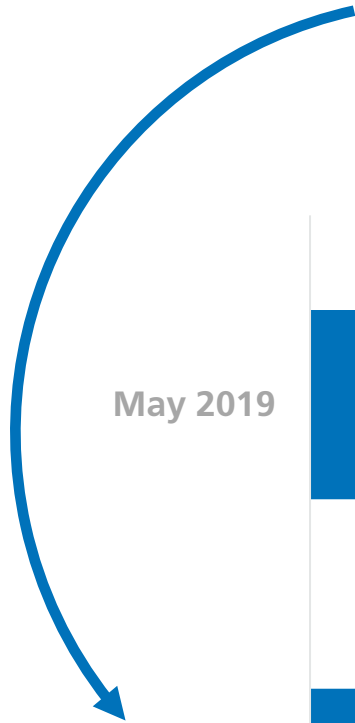
But May 2021 parking revenues were 30% lower than May 2019 levels



Meanwhile, transit revenues have been much slower to return



May 2021 transit revenues were 84% lower than May 2019 levels



May 2019



\$13.7M

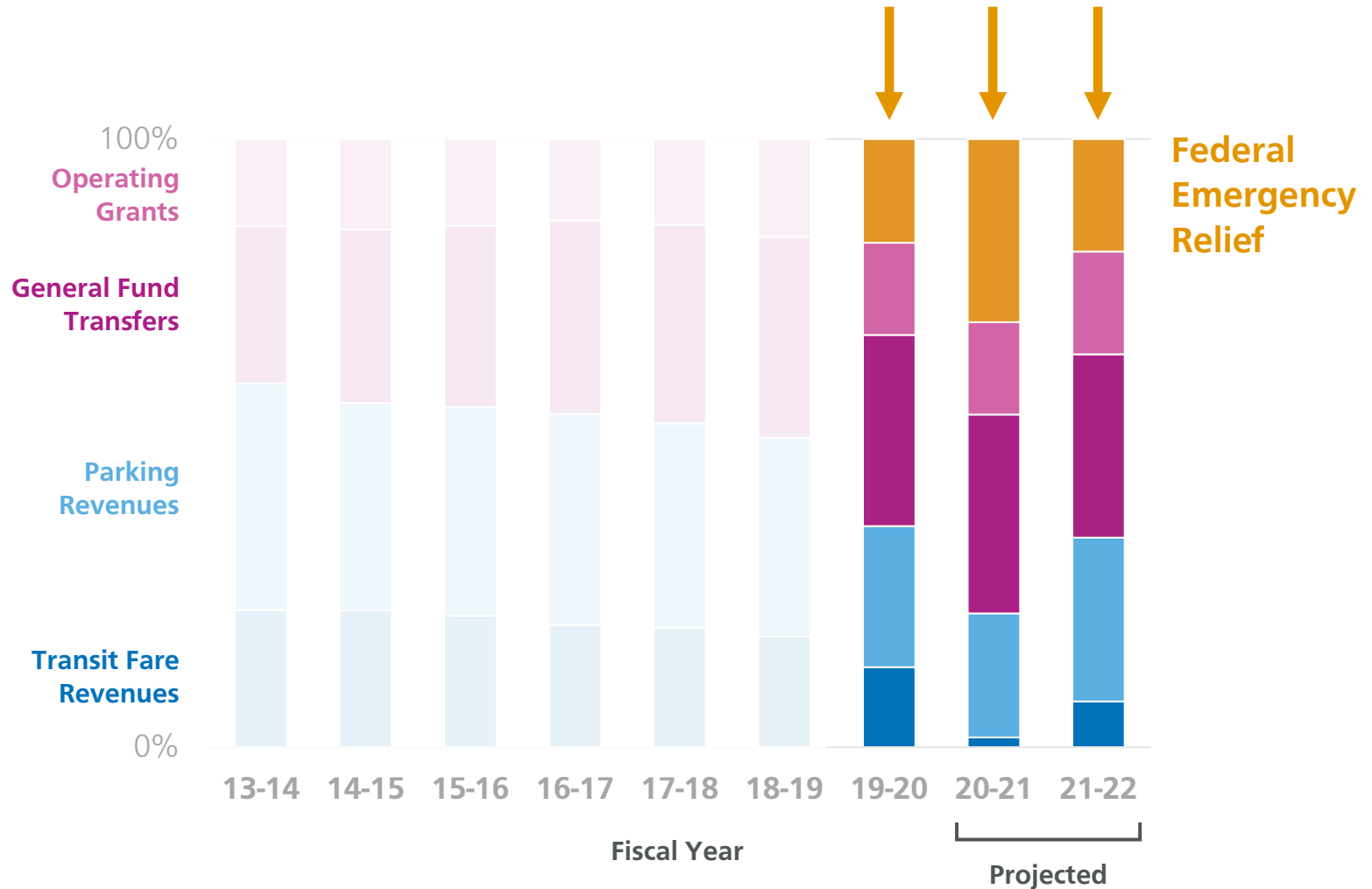
May 2021



\$2.2M

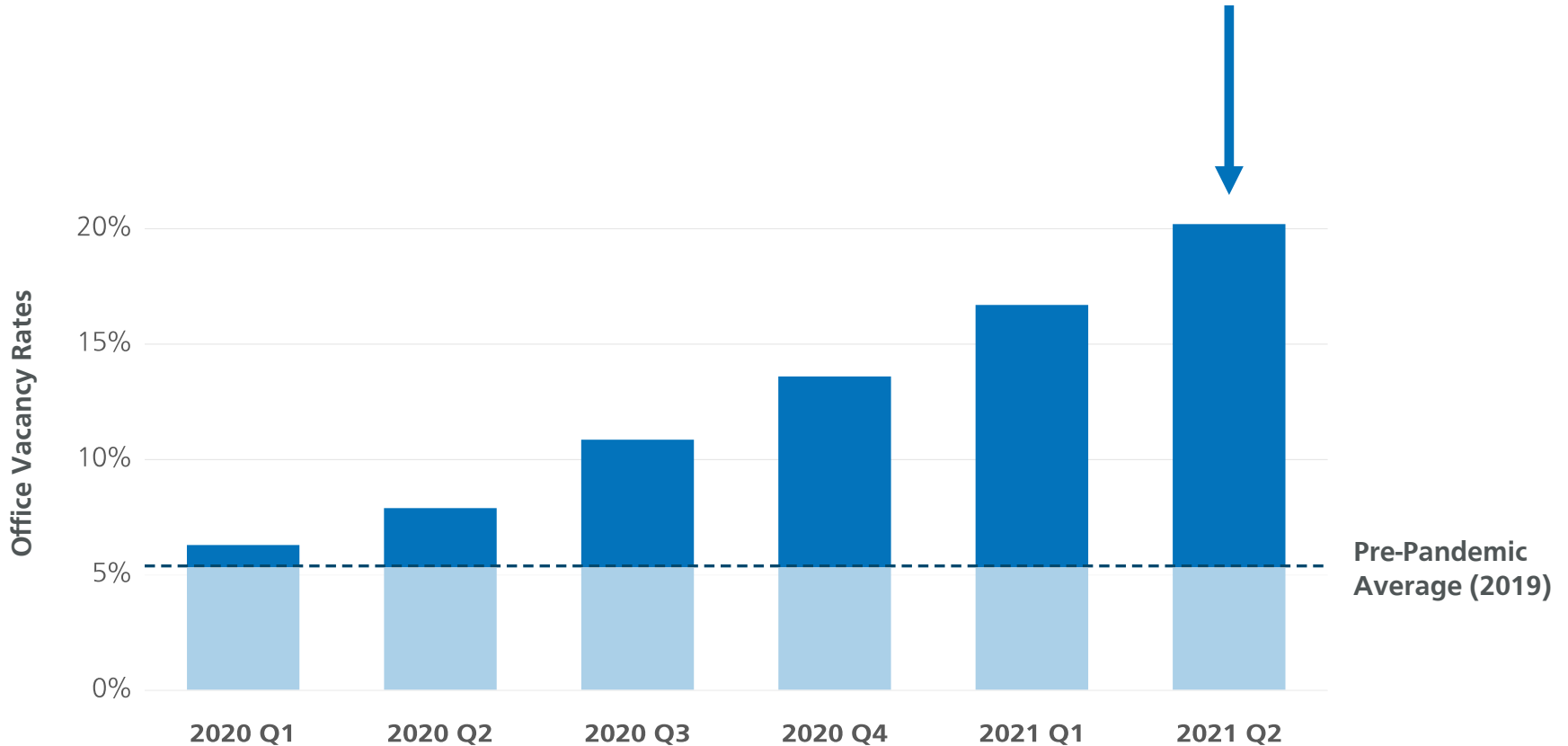
84%
LOWER

In the near term, federal emergency relief funding will be a necessary stopgap



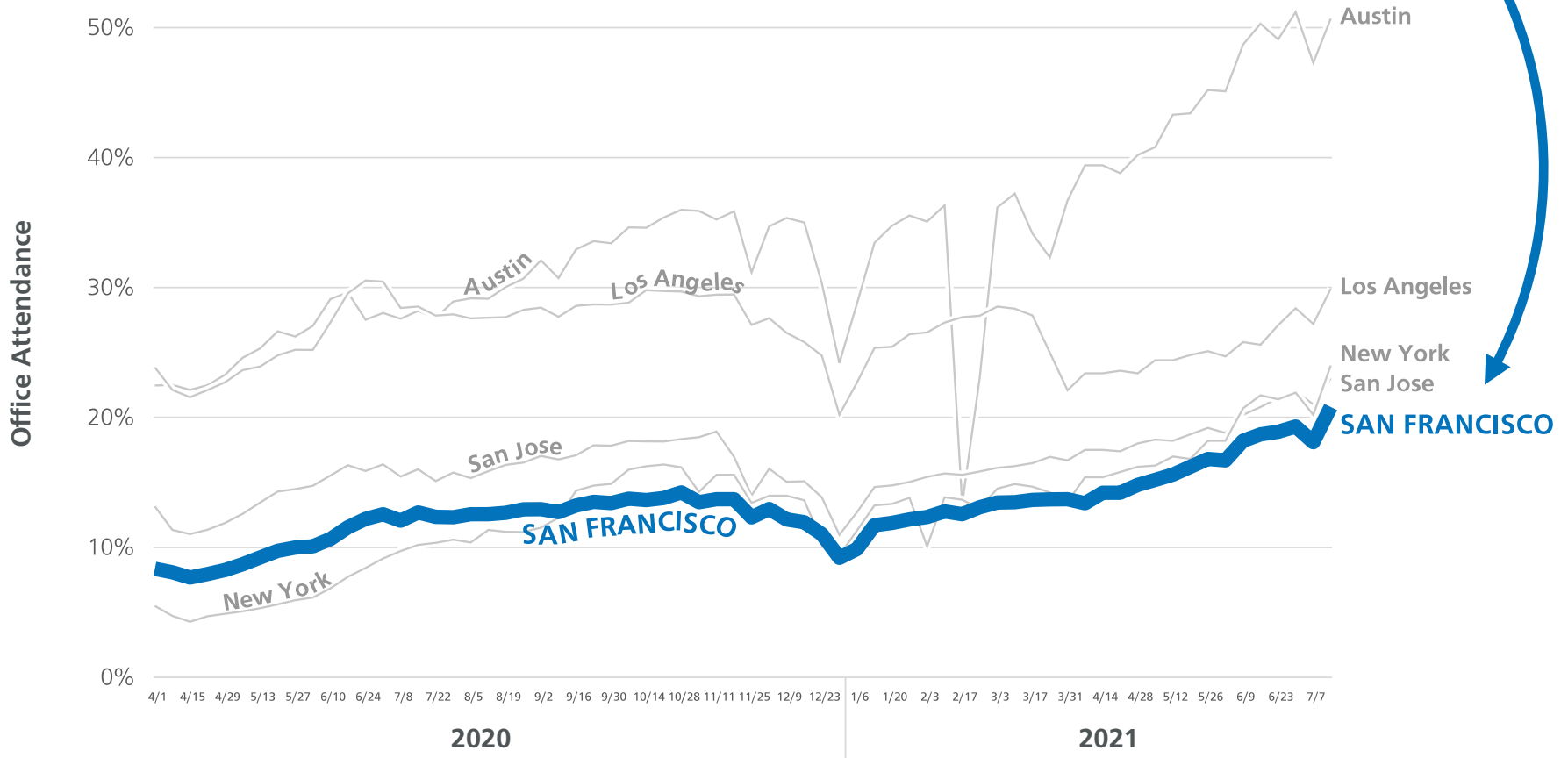
All signs point to a slow recovery for Downtown San Francisco

Q2 saw a “further rise in office vacancy” in San Francisco, which were already at historic highs



Source: Jones Lang LaSalle, via [SF Office of the Controller](#)

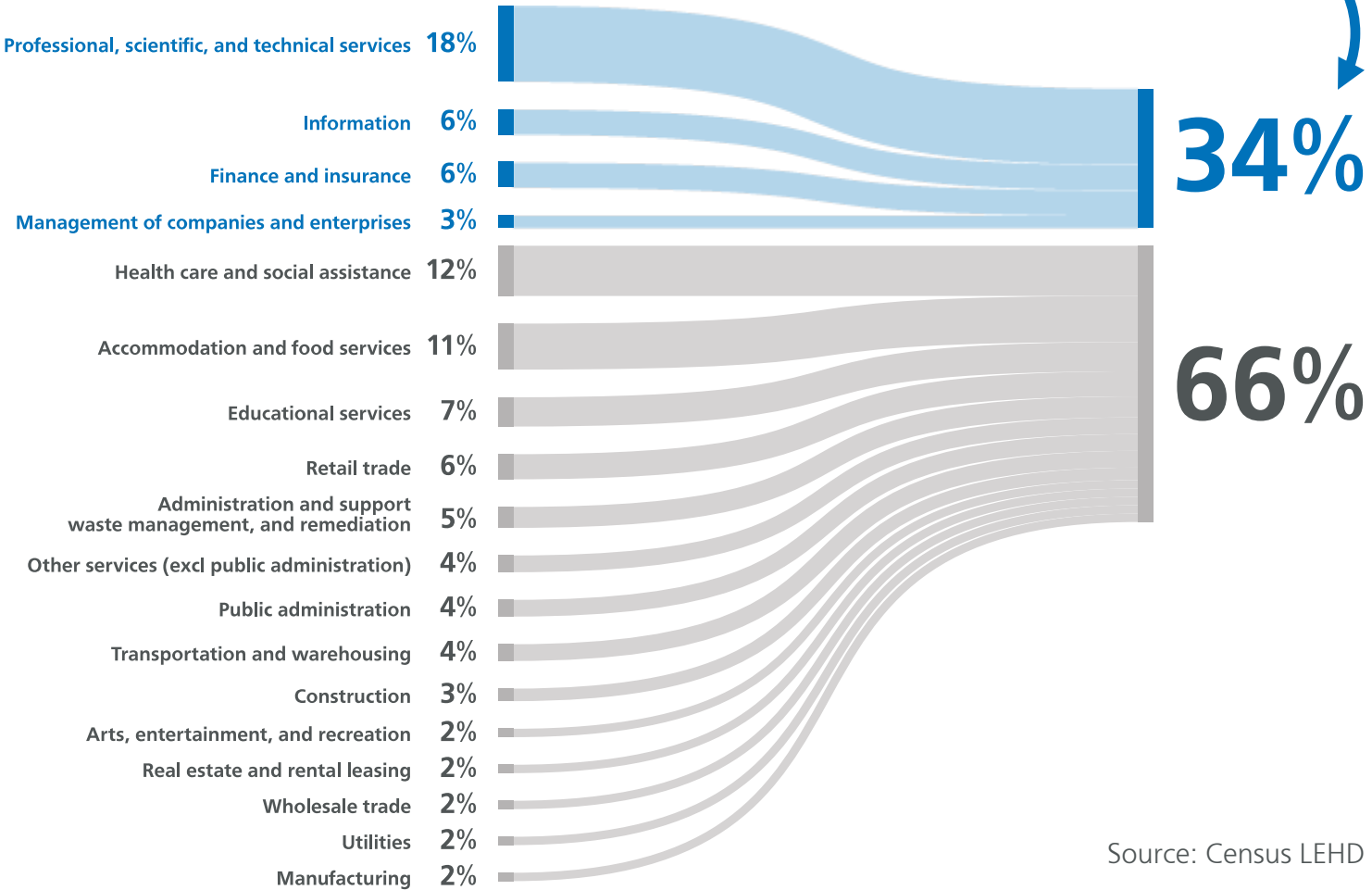
“SF Metro lags” comparable metro areas in office attendance



Source: Kastle Systems, via [SF Office of the Controller](#)

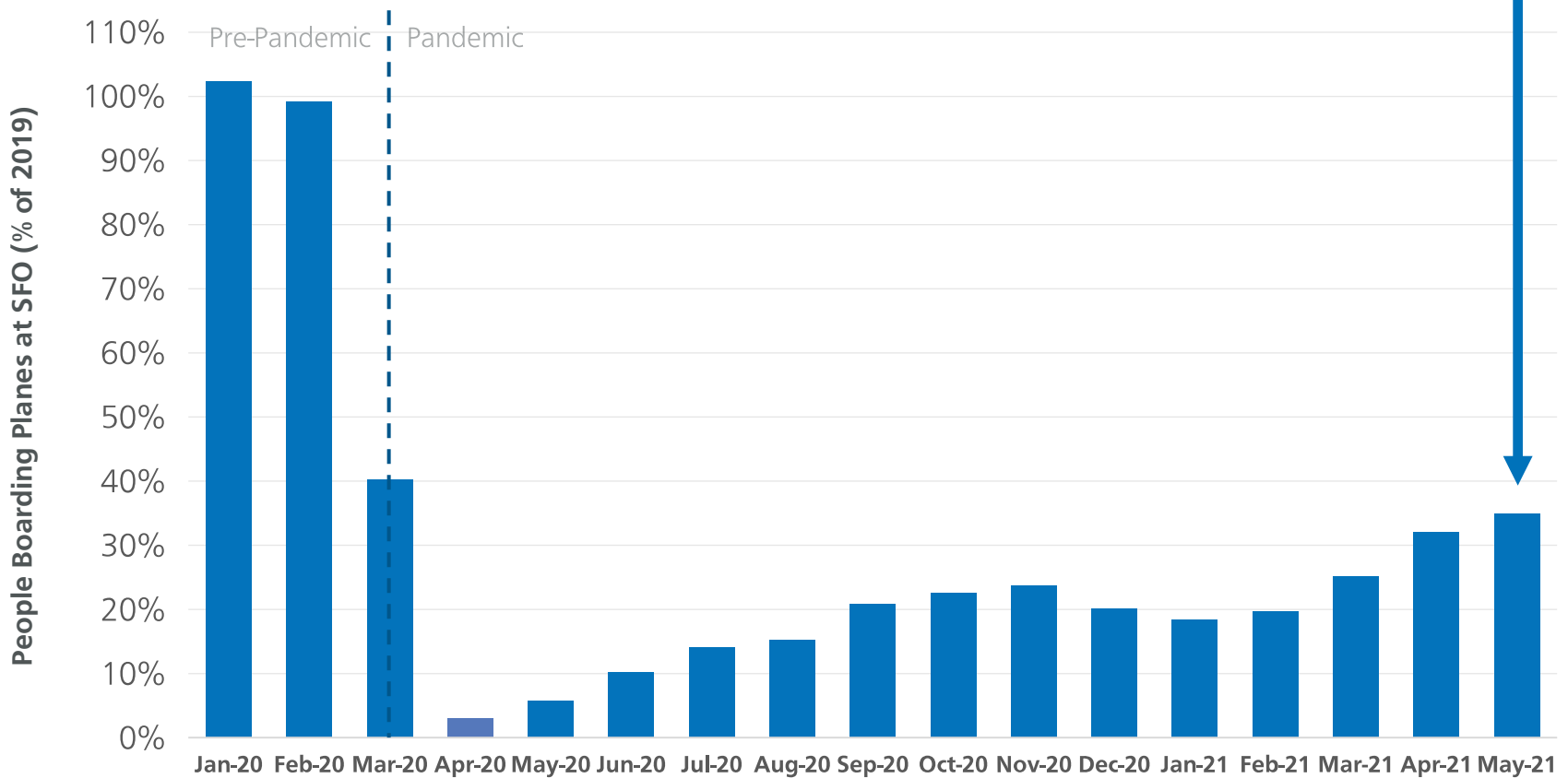
More than one-third of all jobs in San Francisco are in sectors that are well-suited to working from home

San Francisco Jobs by Sector (%)



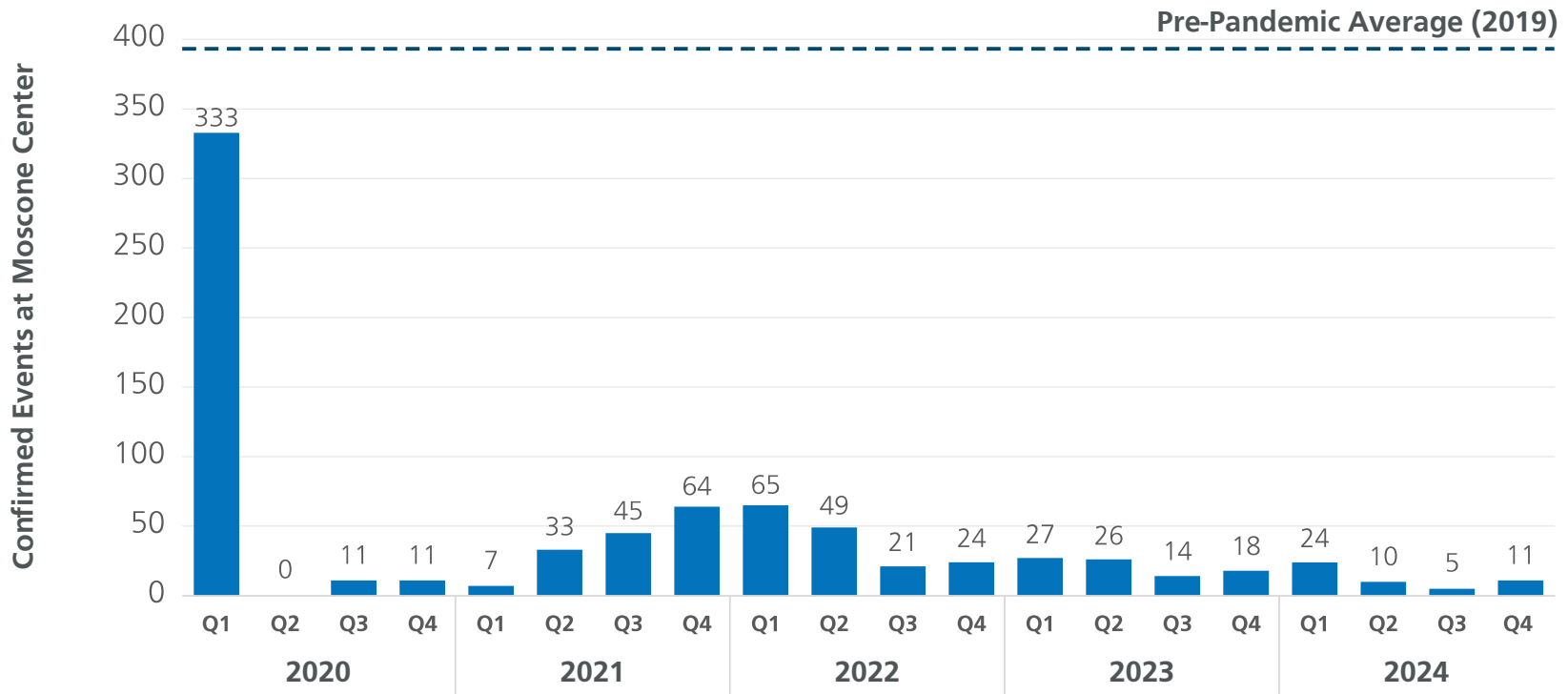
Source: Census LEHD (2018)

The number of people boarding planes at SFO was “well below normal” as of May 2021



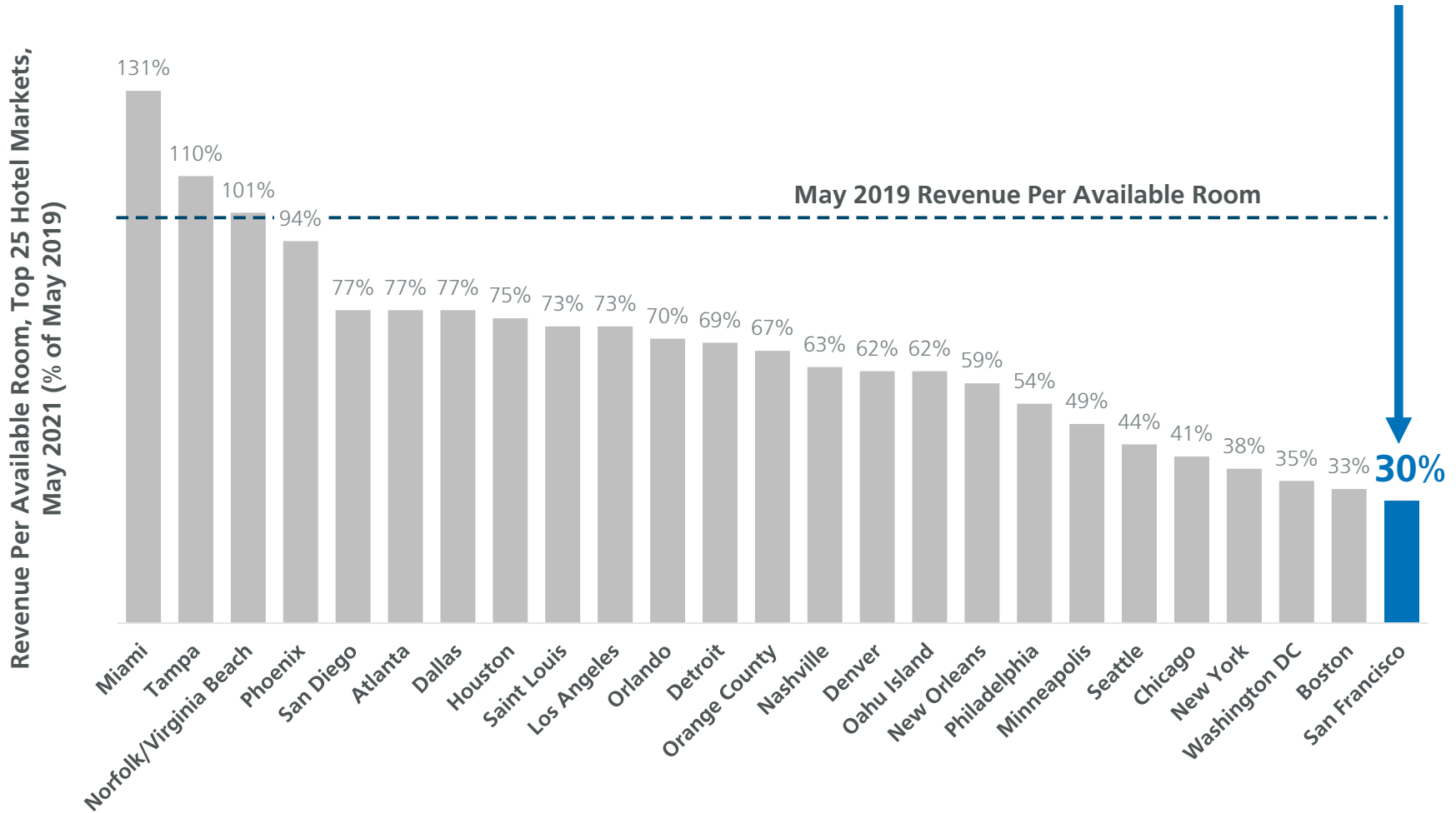
Source: San Francisco International Airport (SFO), via [SF Office of the Controller](#)

Future bookings at the Moscone Center significantly below pre-pandemic levels



Source: SF Travel, via [SF Office of the Controller](#)

San Francisco's hotel recovery is the worst in the nation—30% of pre-pandemic levels as of May 2021



Source: [American Hotel & Lodging Association](#)

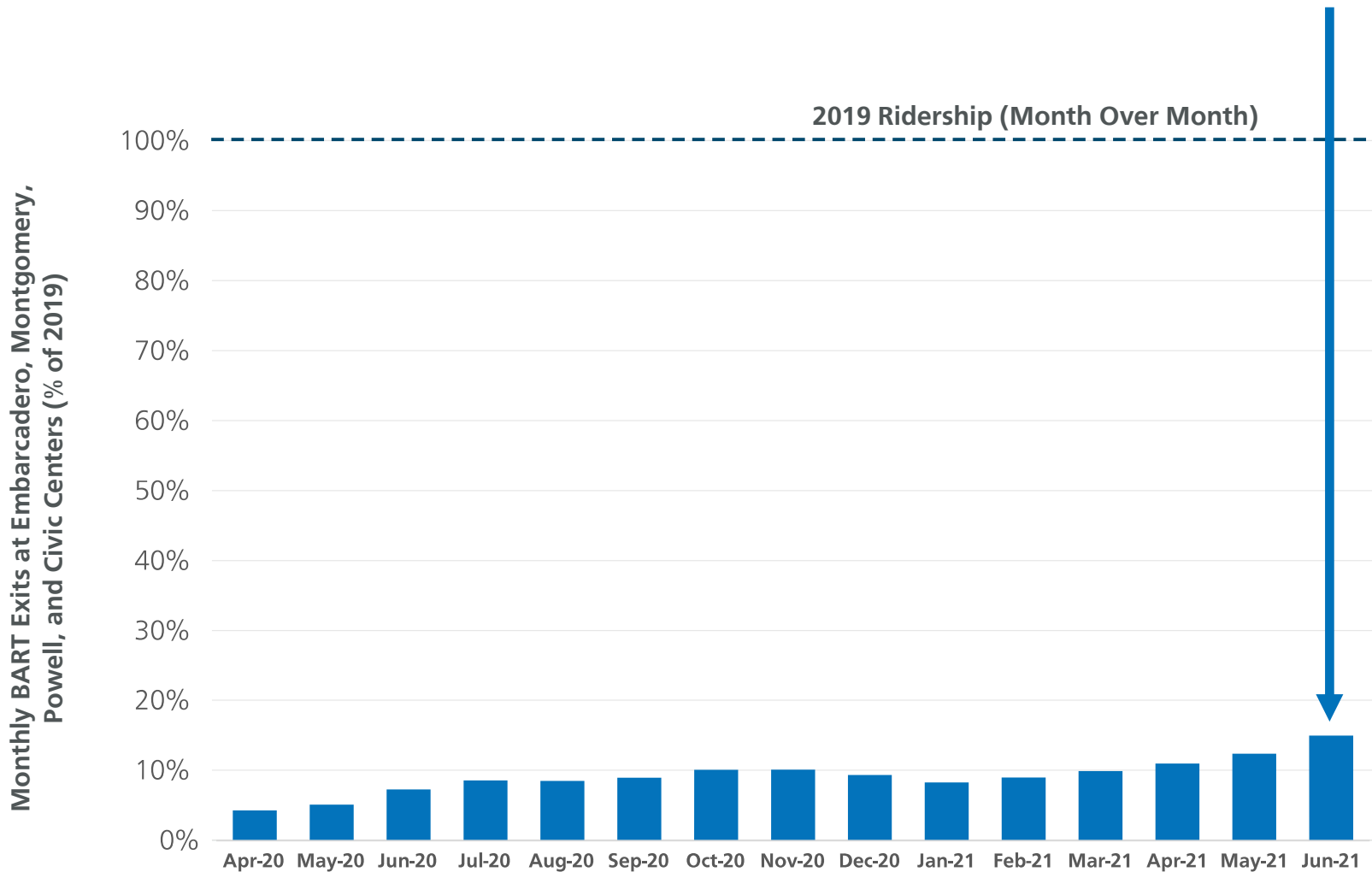
Visitor spending “will not be back to 2019 levels before 2025”

Outlook for the future

San Francisco Travel expects that the situation will gradually improve moving forward. Overall visitation to the city is forecast to reach 15.3 million in 2021. Overall visitor spending is expected to grow from \$2.1 billion in 2020 to \$3.5 billion in 2021. Total visitation is anticipated to return to pre-pandemic levels by 2023. Spending will not be back to 2019 levels before 2025 due to a slower recovery of international visitors and average rate in the city.

Source: [SF Travel](#)

“BART ridership returning, but still below normal”



Source: BART, via [SF Office of the Controller](#)

ConnectSF Reference Slides

ConnectSF Background

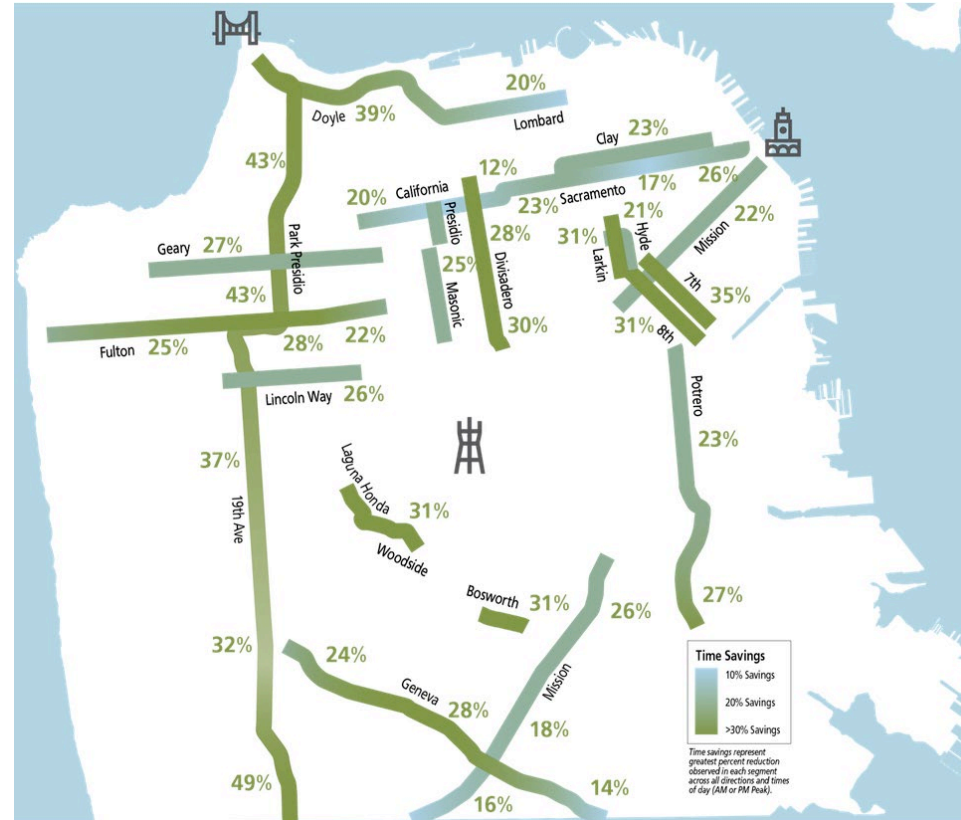
ConnectSF is a multi-agency process to build an effective, equitable, and sustainable transportation system for San Francisco's future



2

Preserve Travel Time Savings

When the pandemic began, congestion on our streets vanished, demonstrating the time savings riders get when buses aren't stuck in traffic.



3

Renew and Modernize Our Rail System

Subway renewal addresses crowding and congestion

Envisions the next generation of subway service for San Francisco

Upgrades such as a new train control system will allow **four-car trains** and **consistent, predictable service**.



3 Build A Complete Network for Walking and Biking



Transit Survey Information

- Distributed via ConnectSF and related project email lists
- Paid distribution through community organizations
- Offered individual community group meetings
- Available in four languages – English, Chinese, Spanish, and Filipino
- 549 completed responses
- 3 main questions on long-range transit trade-offs, reasons why you made that choice, and an open-ended question

Initial Survey Response Summary

- All components of the strategy were popular
 - Making the system work better
 - Five Minute Network
 - Rail Modernization
 - Rail Expansion
- Five Minute Network and Major Rail Investments received the most 1st choice votes (~40% each)
 - Many said “do both”, reinforcing the need to build quick, low-cost transit improvements while we advance the long-term rail projects
- 70% listed Rail Modernization as 1st or 2nd choice

Transit Investment Strategy Timeline

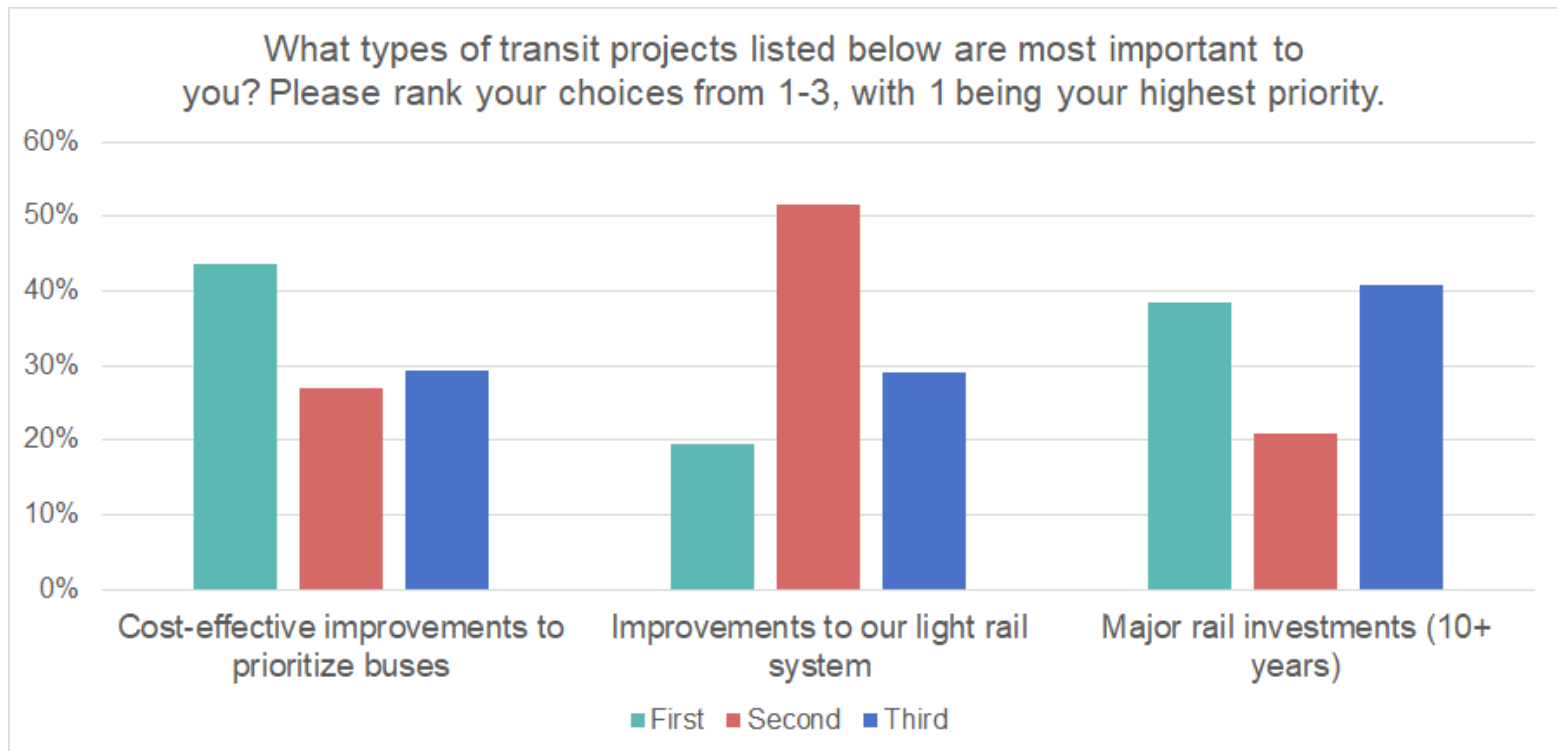
Transit Investment Strategy Storymap remains available for public viewing

Staff available to present to community groups and other online meetings upon request

Outreach results being incorporated in Transit Corridors Study Report

Anticipated publication of report in Fall 2021

All Transit Strategy Components were Popular



Grouped responses by demographics

