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.

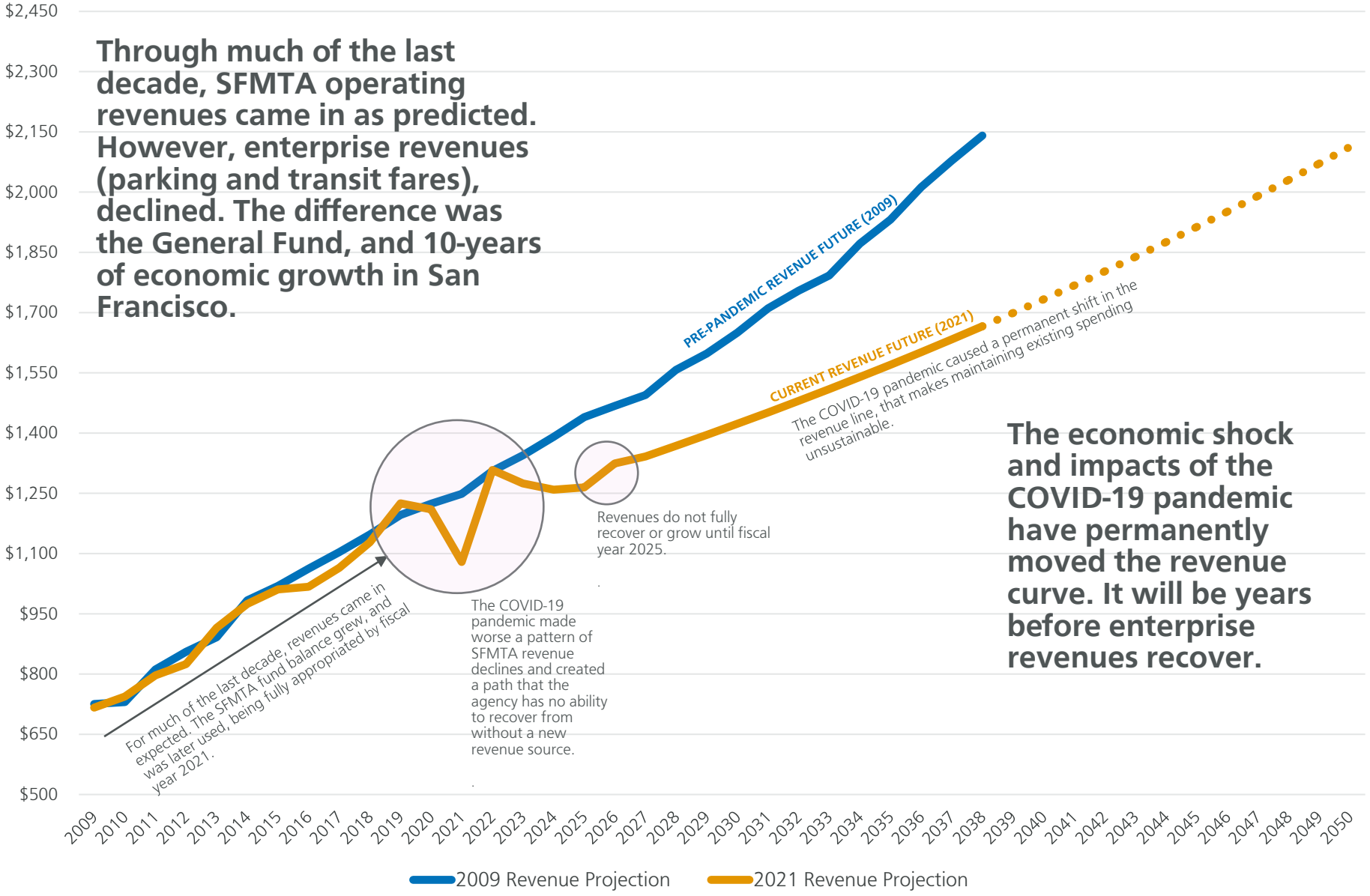
We have looked at our past,
and charted out our future.

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.

Operating Revenue Projection 2009 vs 2021

in $millions



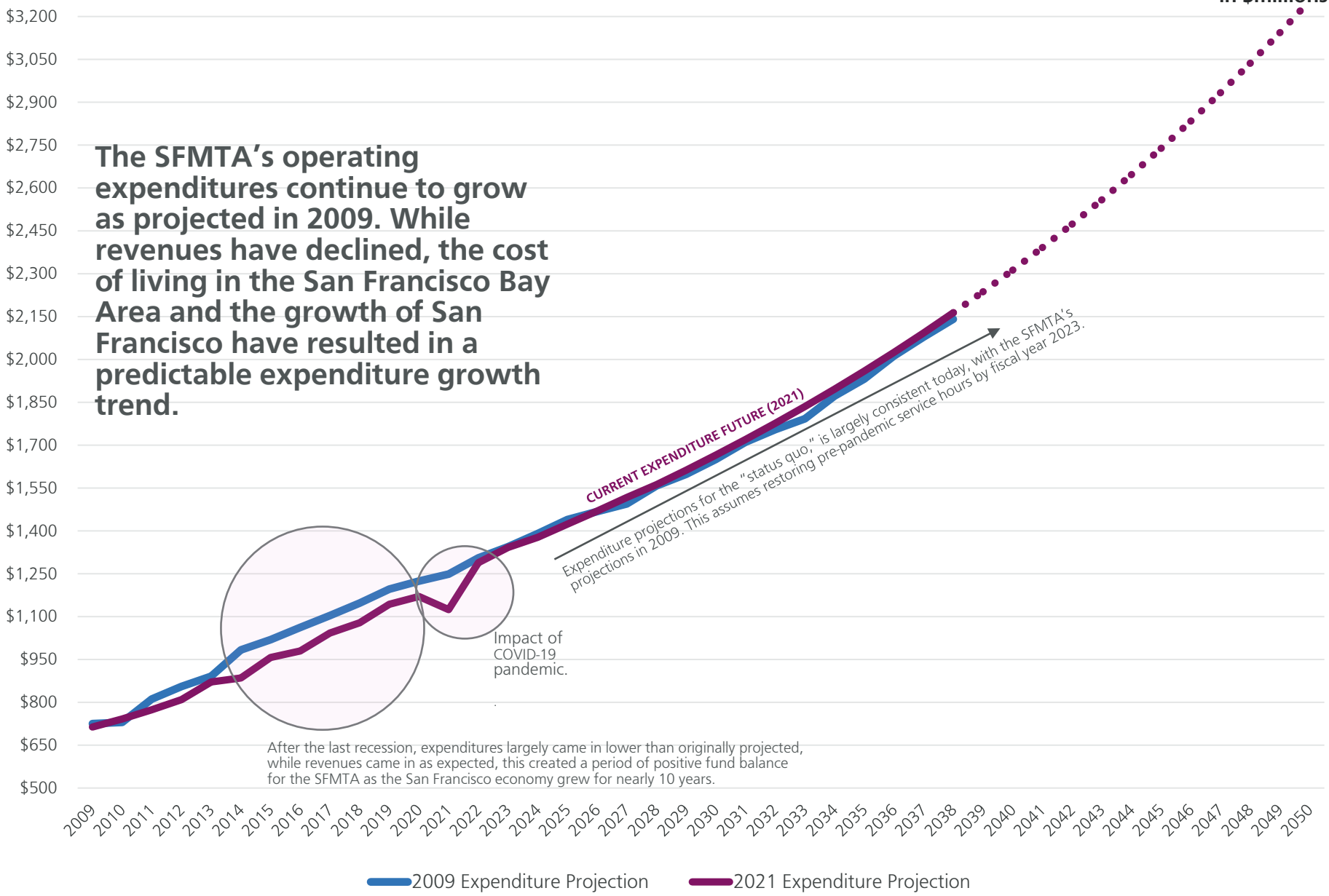
Through much of the last decade, SFMTA operating revenues came in as predicted. However, enterprise revenues (parking and transit fares), declined. The difference was the General Fund, and 10-years of economic growth in San Francisco.

The economic shock and impacts of the COVID-19 pandemic have permanently moved the revenue curve. It will be years before enterprise revenues recover.

SFMTA Operating Expenditure Projections 2009 vs 2021

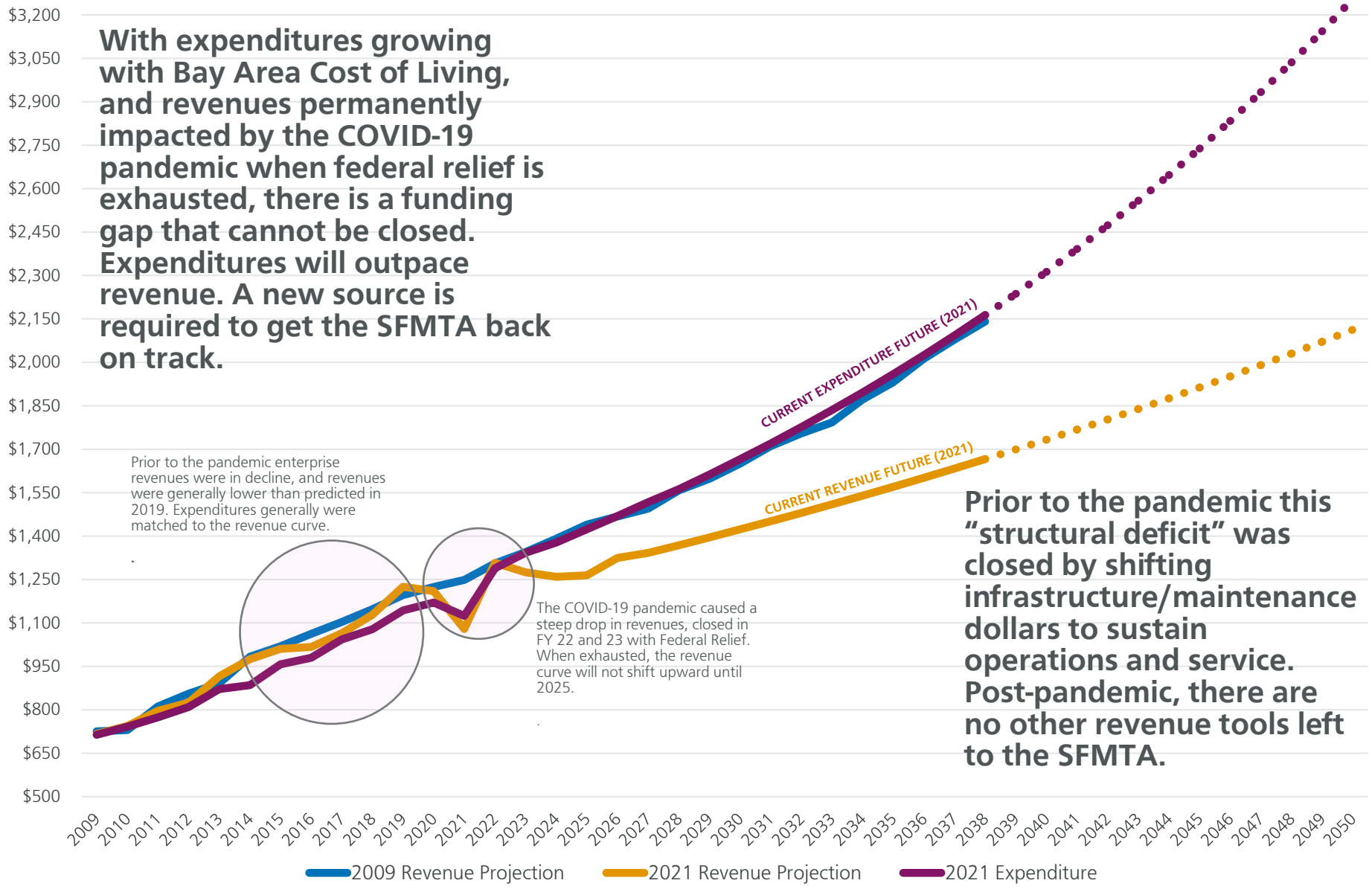
in $millions

The SFMTA's operating expenditures continue to grow as projected in 2009. While revenues have declined, the cost of living in the San Francisco Bay Area and the growth of San Francisco have resulted in a predictable expenditure growth trend.



SFMTA Operating Revenues vs. Expenditure Projection 2009 vs 2021

in $millions



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

SFMTA

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

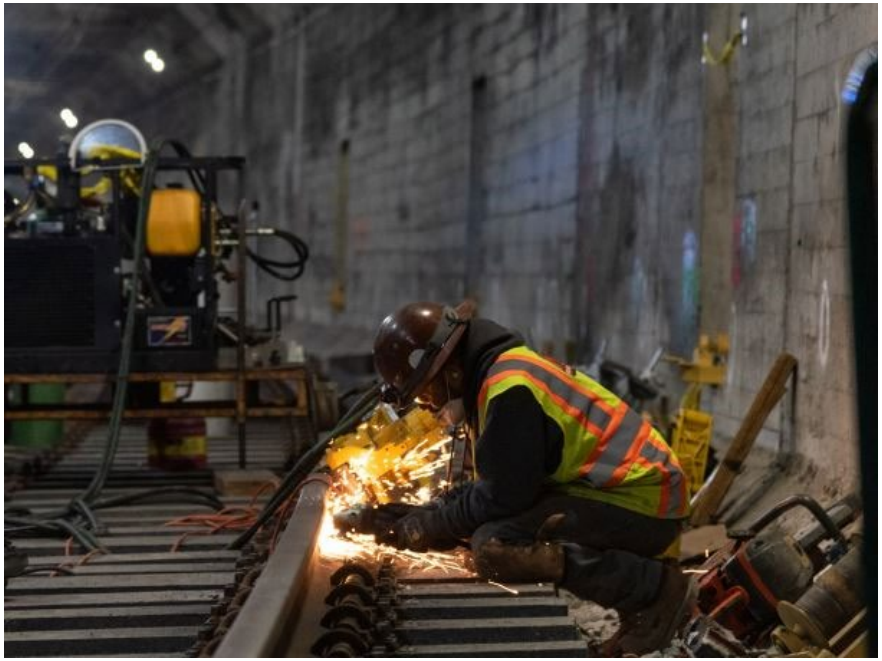
Transit Investment Strategy Goals

- 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

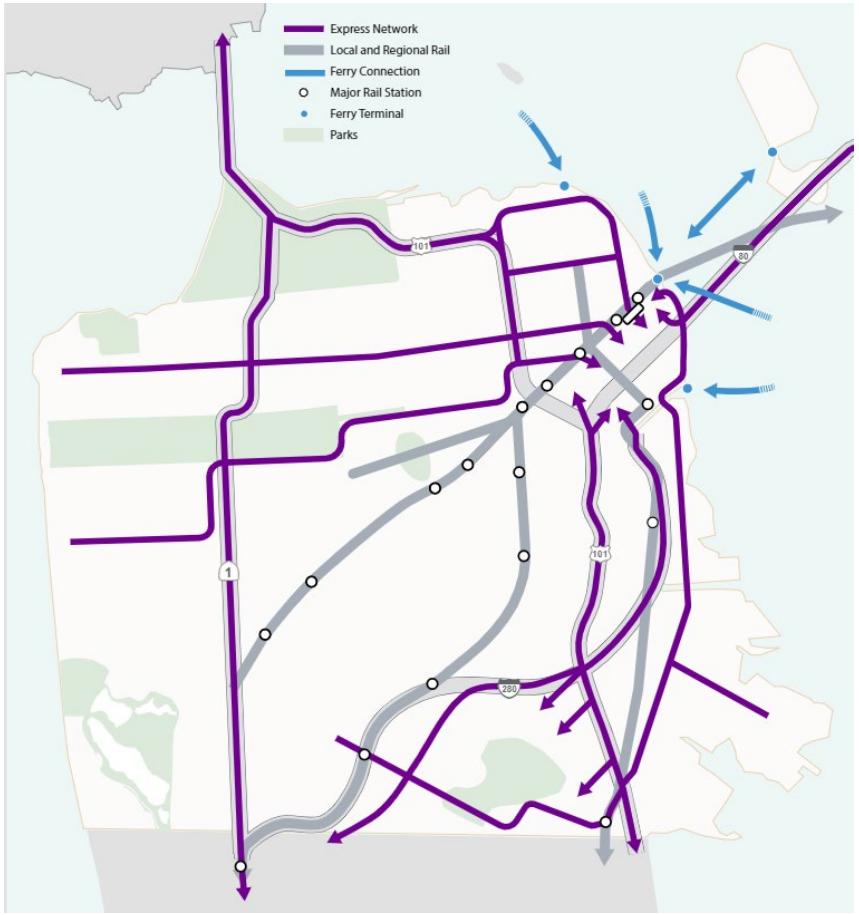
Fast, frequent service and easy transfers throughout SF

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



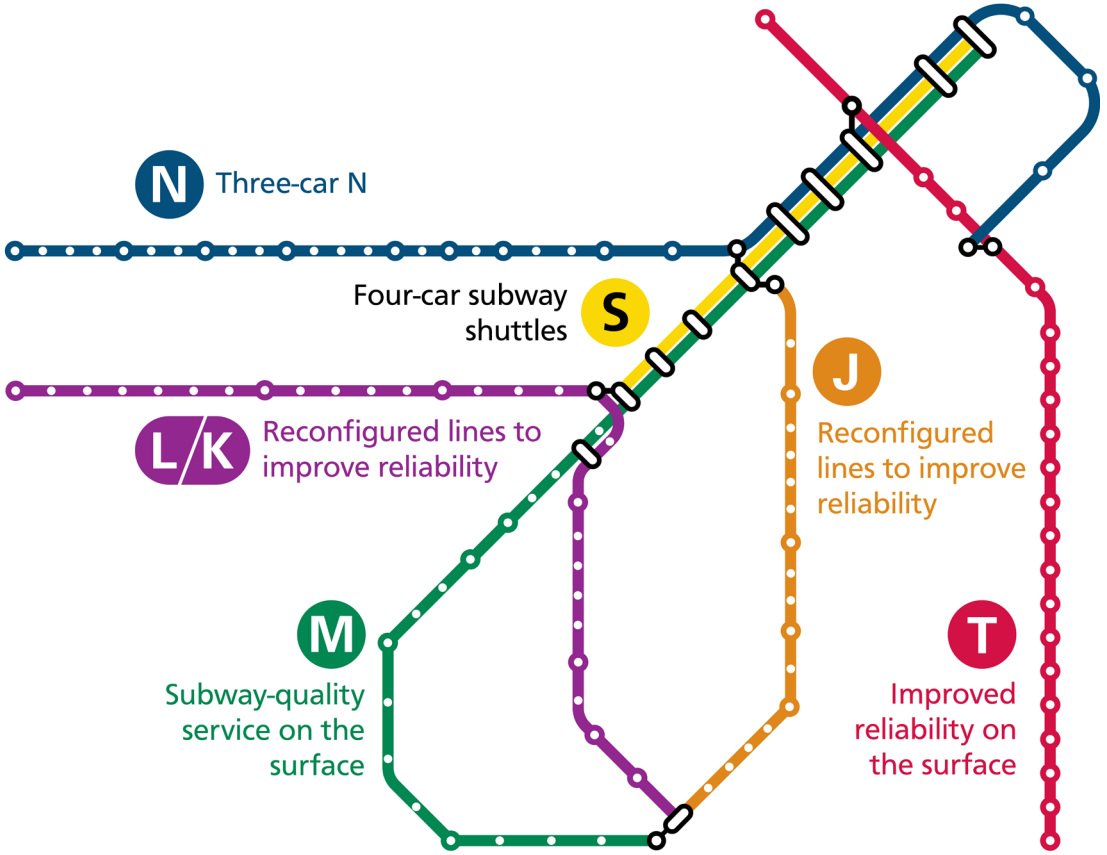
3 Renew and Modernize Our Rail System

Subway renewal addresses crowding and congestion

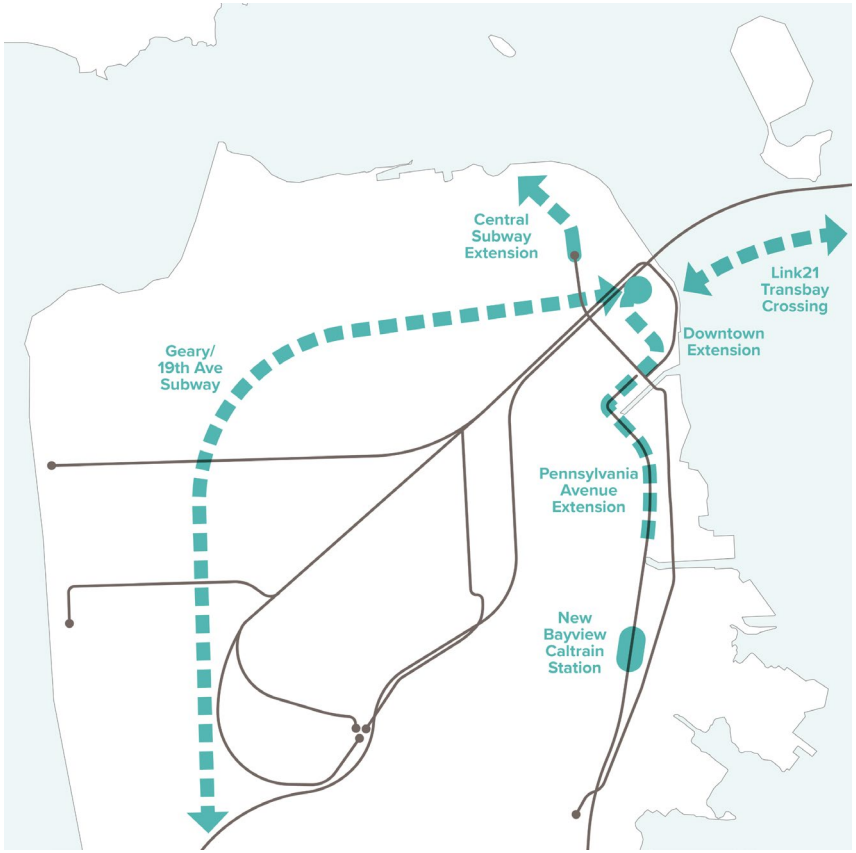
Rebuild our aging rail network

Expand critical infrastructure that keeps trains moving

Longer trains and more reliable service

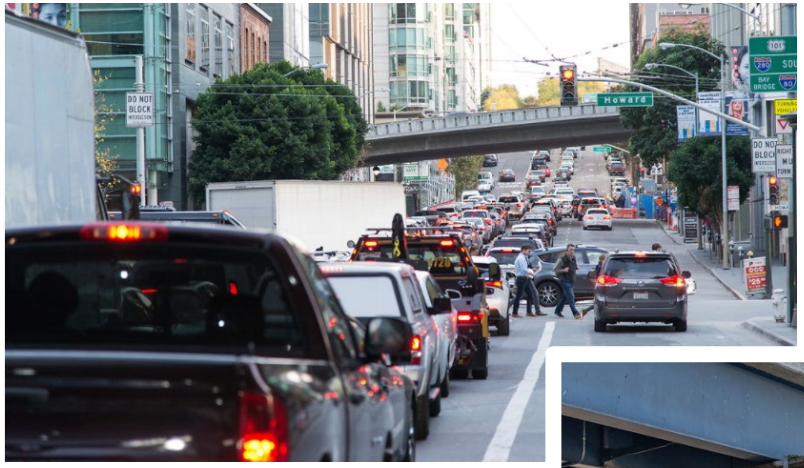


4 Build Rail to SF's Busiest Places

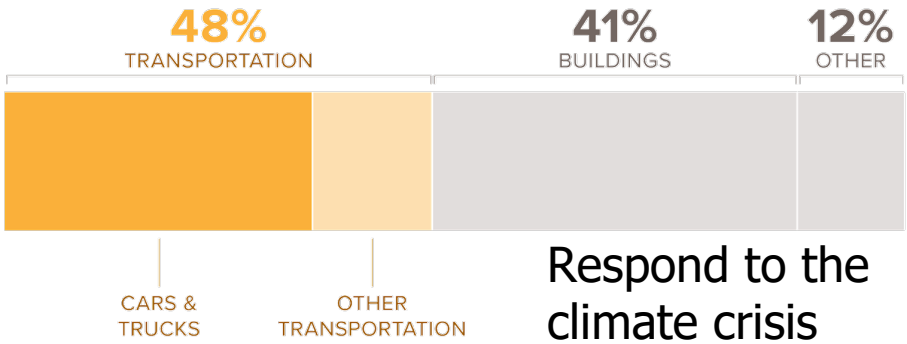


Streets & Freeways Strategy

Challenges for our Streets and Freeways



We have limited street space



Respond to the climate crisis

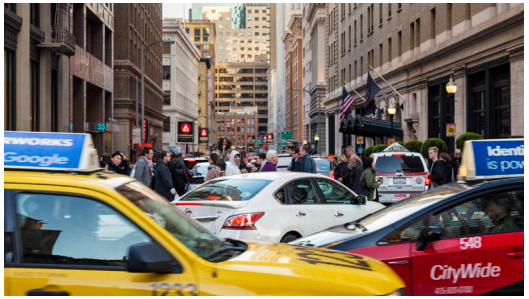
Freeways divide some communities, create negative impacts

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

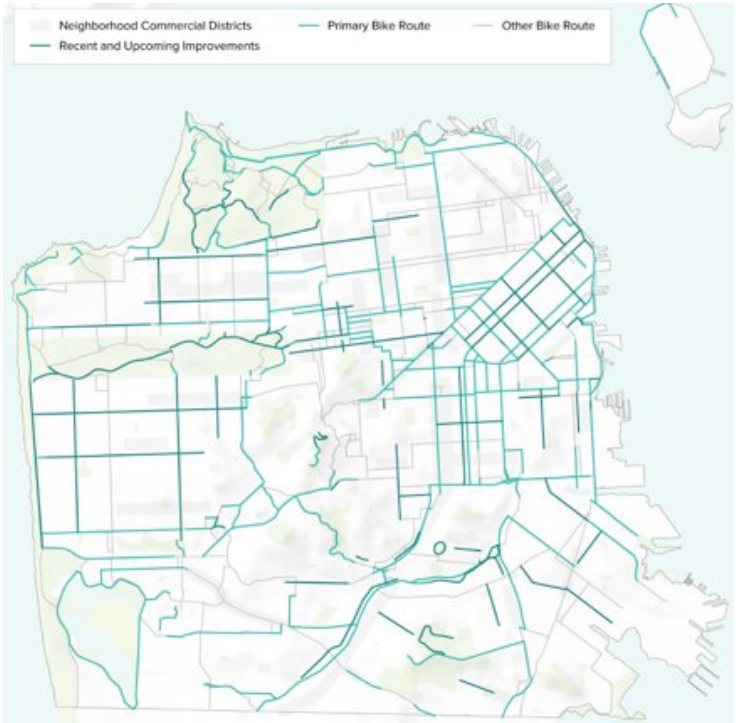


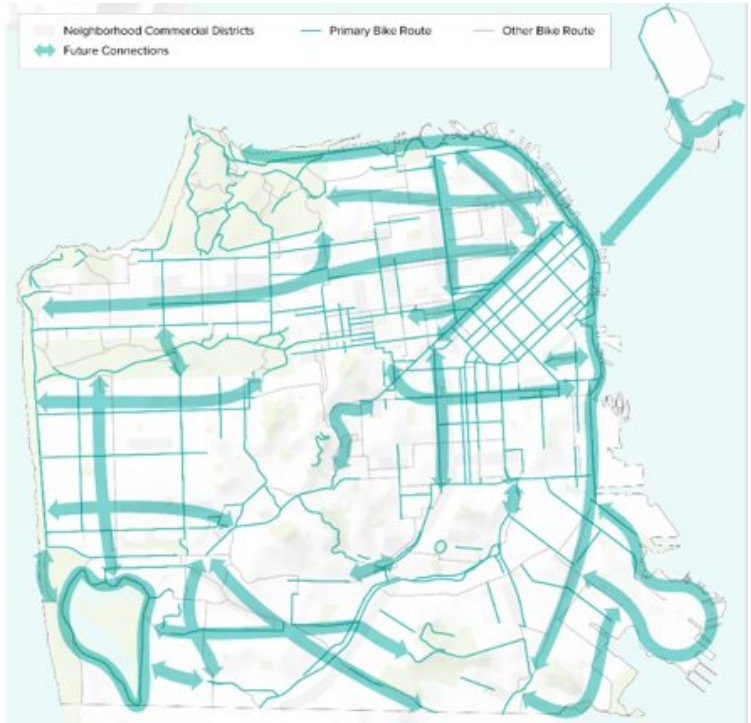
Exploring pricing to help transit and carpools move more quickly and reliably in congested areas

<u>Lead with equity</u>

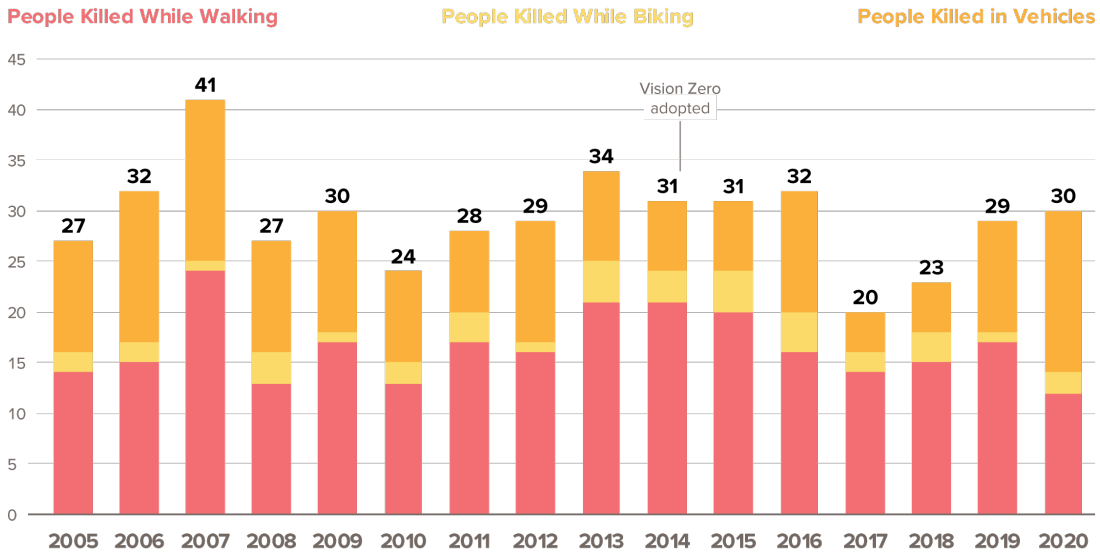
- Robust community involvement
- Discounts for people with low-incomes
- Use revenues to improve transit

3 Build A Complete Network for Walking and Biking





4 Prioritize Safety in all Investments and through Targeted Programs



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

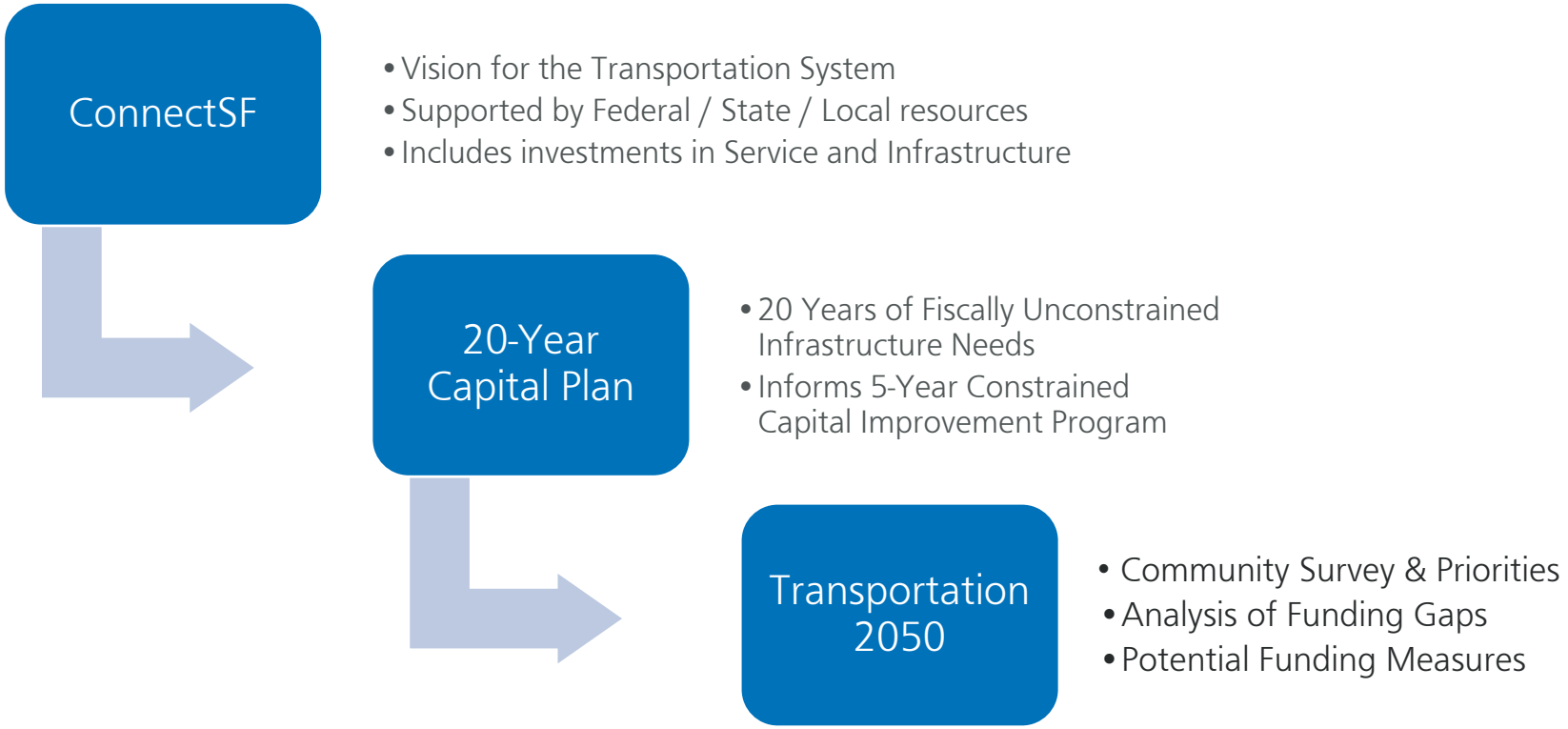
- **Transportation Element Update**
  - Guides policy implementation in City codes and project approvals
  - Integrates transport, land use, environmental justice, and resiliency
  - Receives environmental clearance

2021 SFMTA 20-Year Capital Plan Update

SFMTA Board of Directors

August 17, 2021

Capital Plan in Context



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

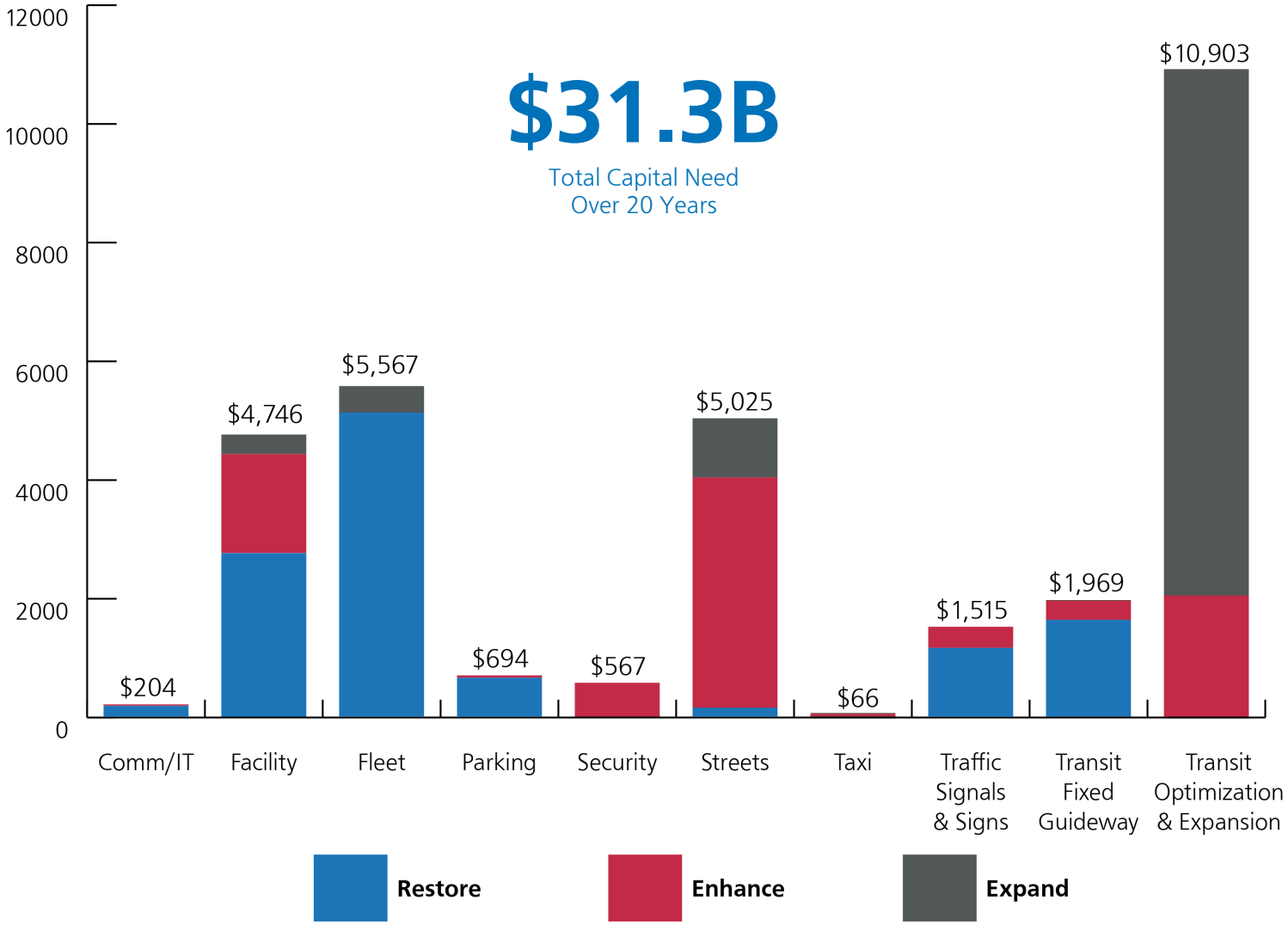
$31.3B of identified Capital Needs over 20 years, or $1.6B annually

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

2019
Bike Program
Report
VISION ZERO SF
VISION ZERO
ACTION STRATEGY
Eliminating
Traffic Deaths
in San Francisco
2017 SFMTA
Facilities
Framework
A VISION
FOR MOVING SAN FRANCISCO
INTO THE FUTURE
ConnectSF
San Francisco
Municipal Transportation Agency
Strategic Plan
April 3, 2018
MUNIFORWARD
Implementation Workbook
2019 State of Good
Repair Report
San Francisco Municipal Transportation Agency
SFMTA Bus Fleet
Management Plan
2017-2030
March 2017
2021
20-Year Capital Plan
San Francisco Municipal Transportation Agency
DRAFT
Capital Improvement
Program
Fiscal Year 2021-25
Adopted April 21, 2020
Operating Budget Book
FY 2020-21 and FY 2021-22
San Francisco Municipal Transportation Agency
PLAN BAY AREA 2050
PROGRAM
2020 Total Capital Needs Update
Communications & IT $ 217,400,000
Facility $ 4,679,100,000
Fleet $ 5,567,188,000
Parking $ 593,766,000
Security $ 556,900,000
Streets $ 4,936,100,000
$ 65,100,000
$ 1,514,729,000
$ 1,968,963,850
$ 10,859,800,000
Expansion $ 31,059,046,850
SAN FRANCISCO FIRE DEPARTMENT
THE CITY AND COUNTY
OF SAN FRANCISCO
CAPITAL PLAN
Revenue
Measure

Capital Needs by Capital Program

(In $ Millions)



Capital Investment Packages

MAKE STREETS SAFER

MAKE THE TRANSPORATION SYSTEM UNIVERSALLY ACCESSIBLE

MAKE THE TRANSPORTATION SYSTEM WORK

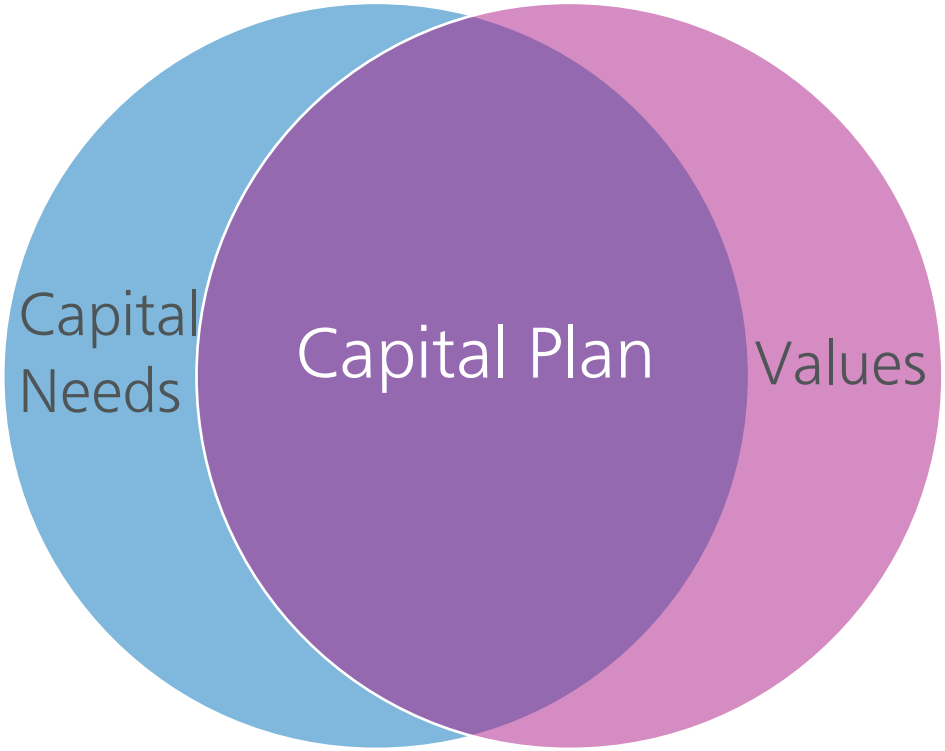
- FACILITIES MODERNIZATION
- TRANSIT MODERNIZATION
- SYSTEM ELECTRIFICATION
- WALKING AND BIKING NETWORK

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



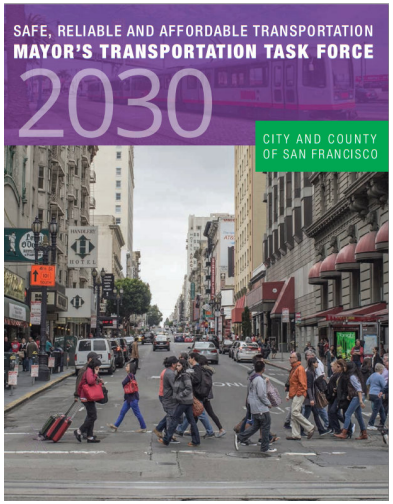
Questions?

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)

T2045

"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."

Reference: Transportation 2045 Report

T2045

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Reference: Transportation 2045 Report

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

Feb '21 Workshop

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:

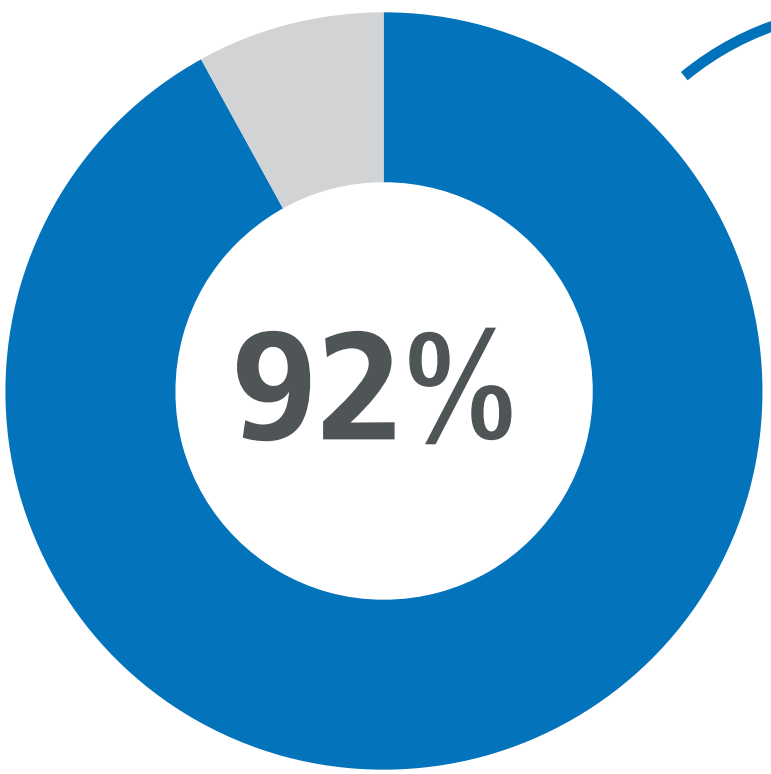
Transit Service Restoration (April 20, 2021, July 20, 2021)
State of Good Repair Report (July 20, 2021)
Vision Zero Action Strategy (July 20, 2021)
SFMTA 20-Year Capital Plan (Today)
ConnectSF Transit Investment Strategy (Today)
ConnectSF Streets and Freeway Strategy (Today)

Reference: SFMTA Board of Directors Workshop – February 3, 2021

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

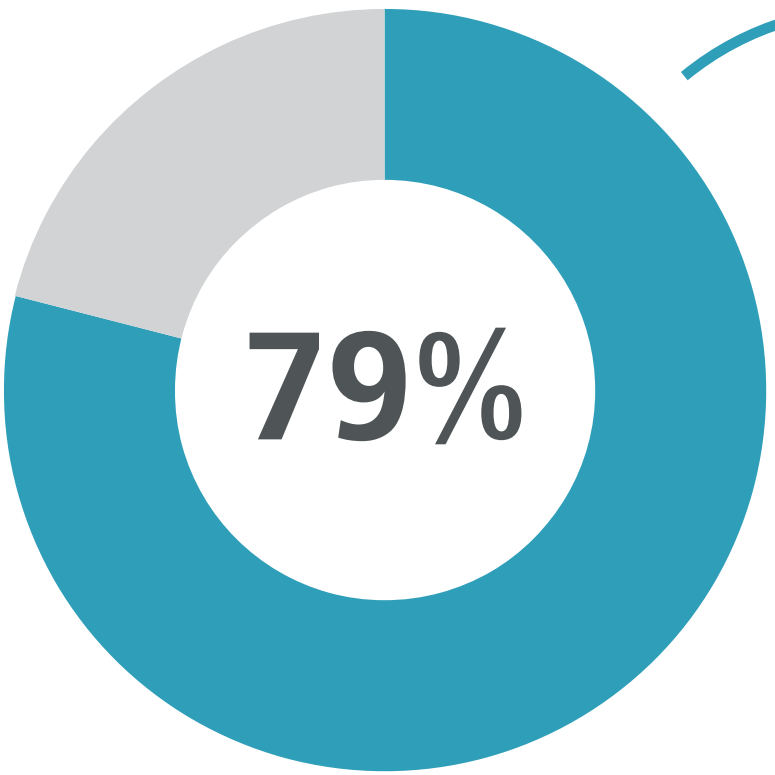
Fast and Convenient Transit

More Repairs and Maintenance

Improving Safety and Access

Investing Equitably

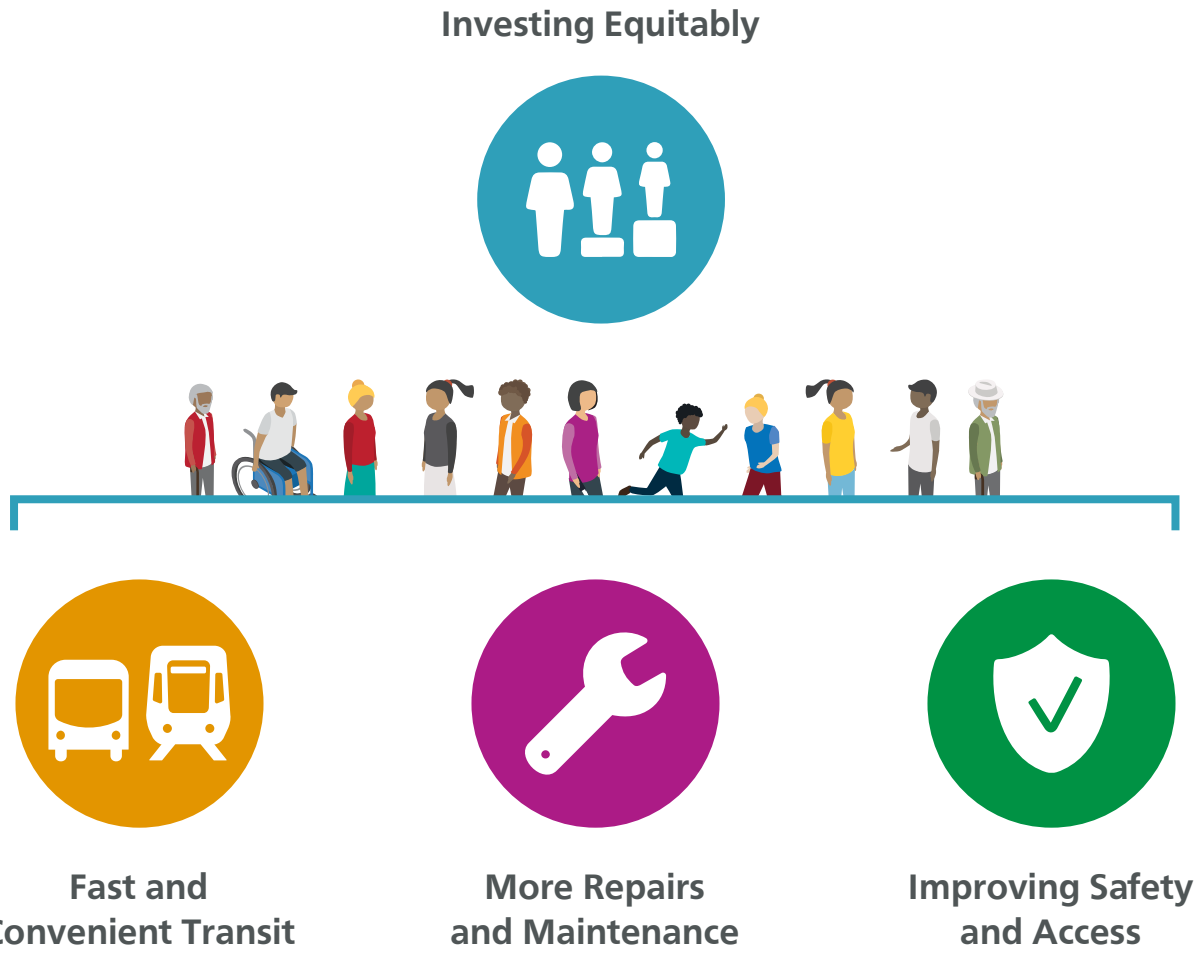
A majority of survey respondents say it is "very important" or "extremely important" to ...



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

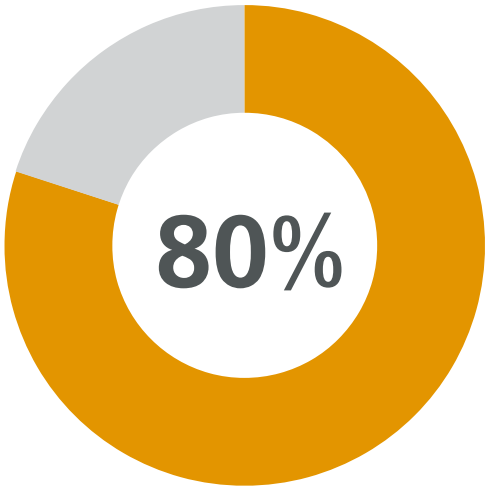
Source: San Francisco citywide survey conducted by FM3, April 2021

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

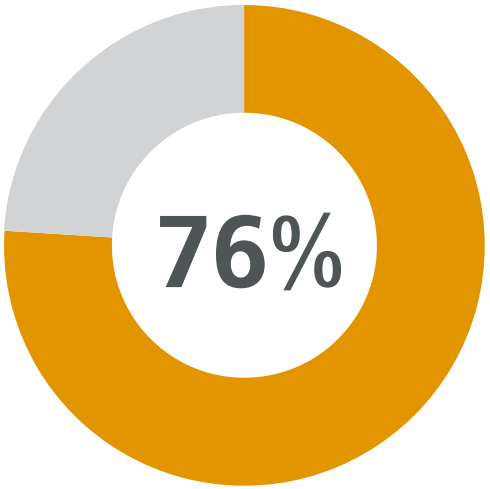


Fast and Convenient Transit

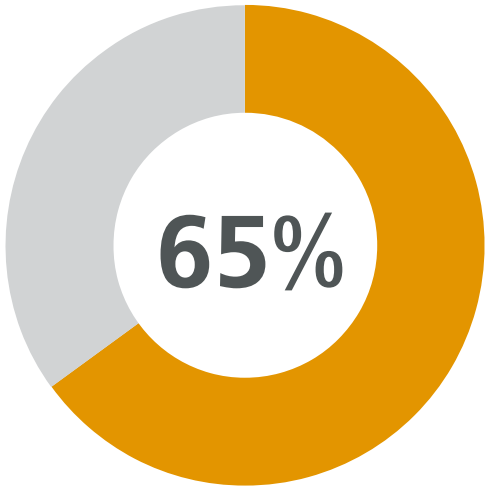
A majority of survey respondents say it is "very important" or "extremely important" to ...



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



Reduce delays to make Muni more reliable

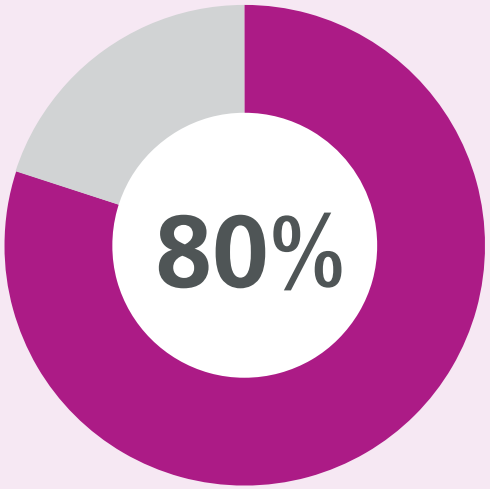


Reduce crowding on Muni

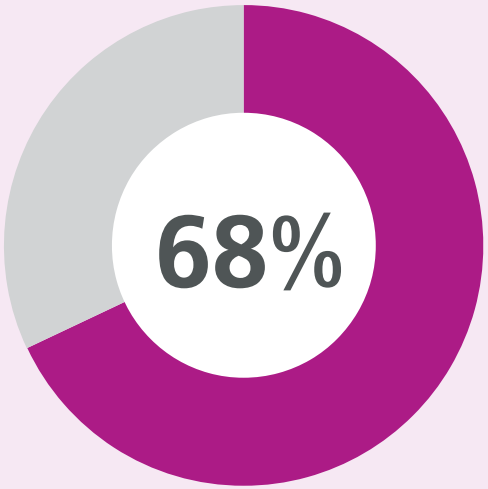
Source: San Francisco citywide survey conducted by FM3, April 2021

More Repairs and Maintenance

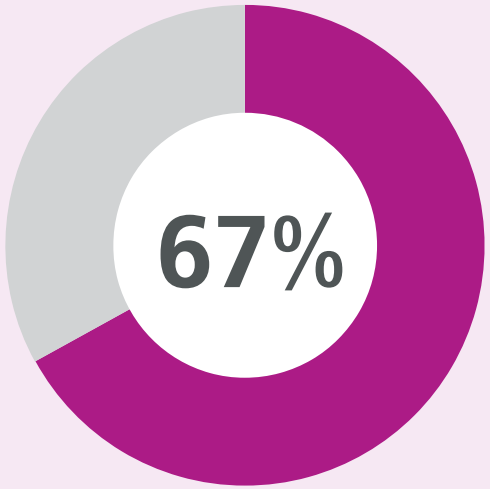
A majority of survey respondents say it is "very important" or "extremely important" to ...



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



Address the backlog of maintenance work

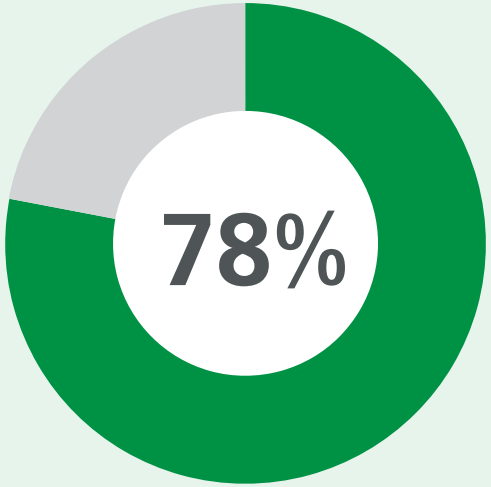


Rebuild San Francisco's aging rail network

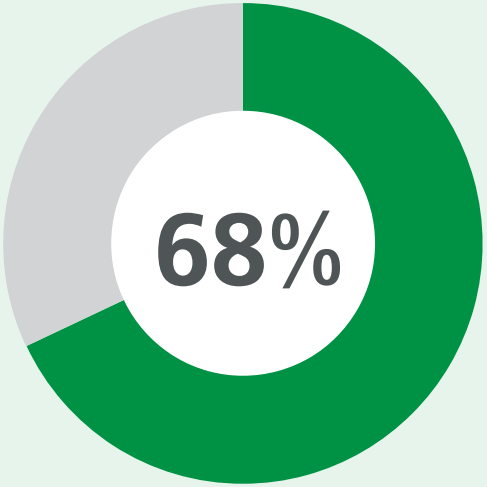
Source: San Francisco citywide survey conducted by FM3, April 2021

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

$111.3B

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

$63.4B

We will spend over the next 30-years

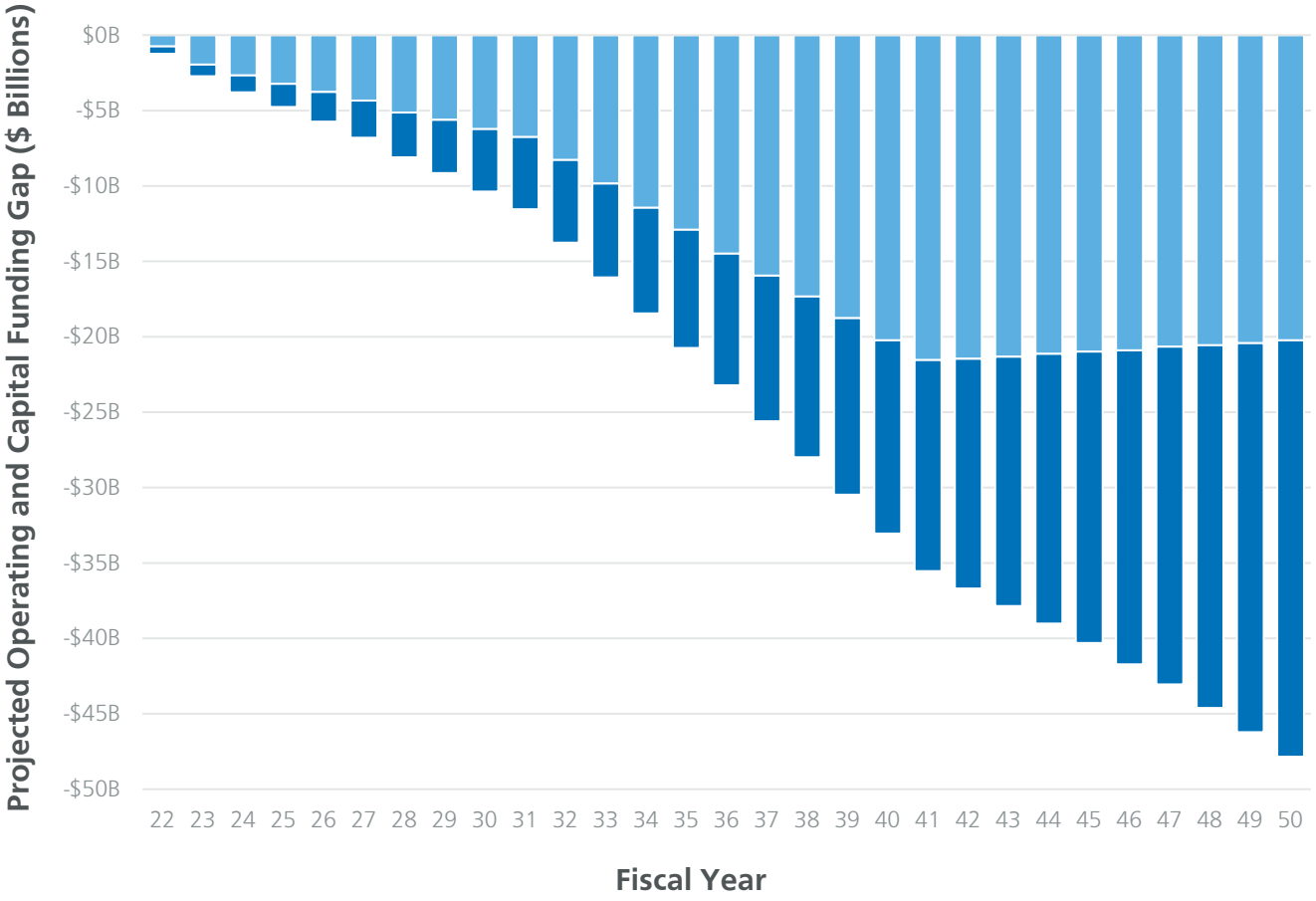
57% funded

($47.8B)

T2050 Funding Gap
Cumulative total over 30-years

43% funding gap

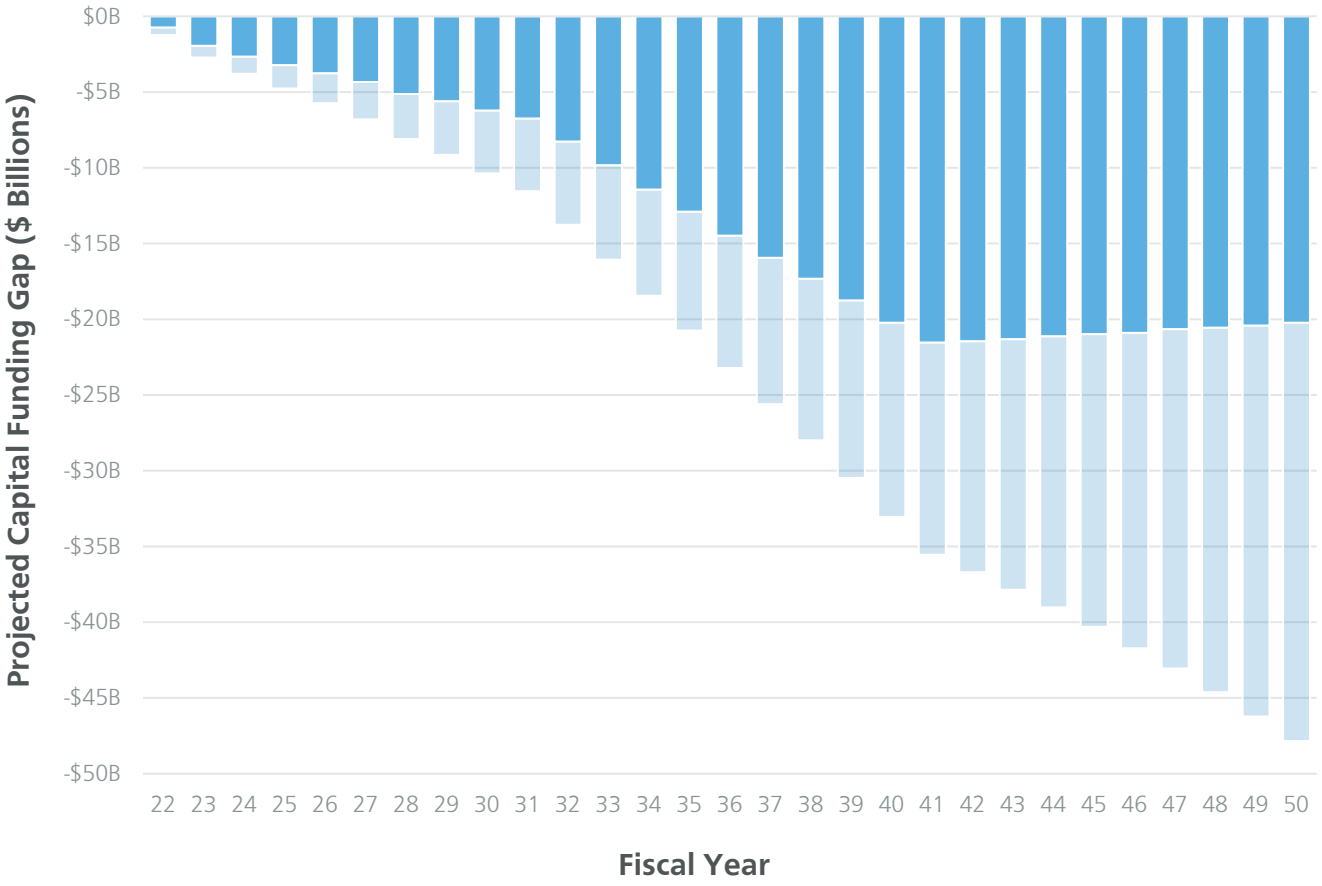
Achieving the vision isn't currently possible because our costs would be much higher than our revenues



$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 ...

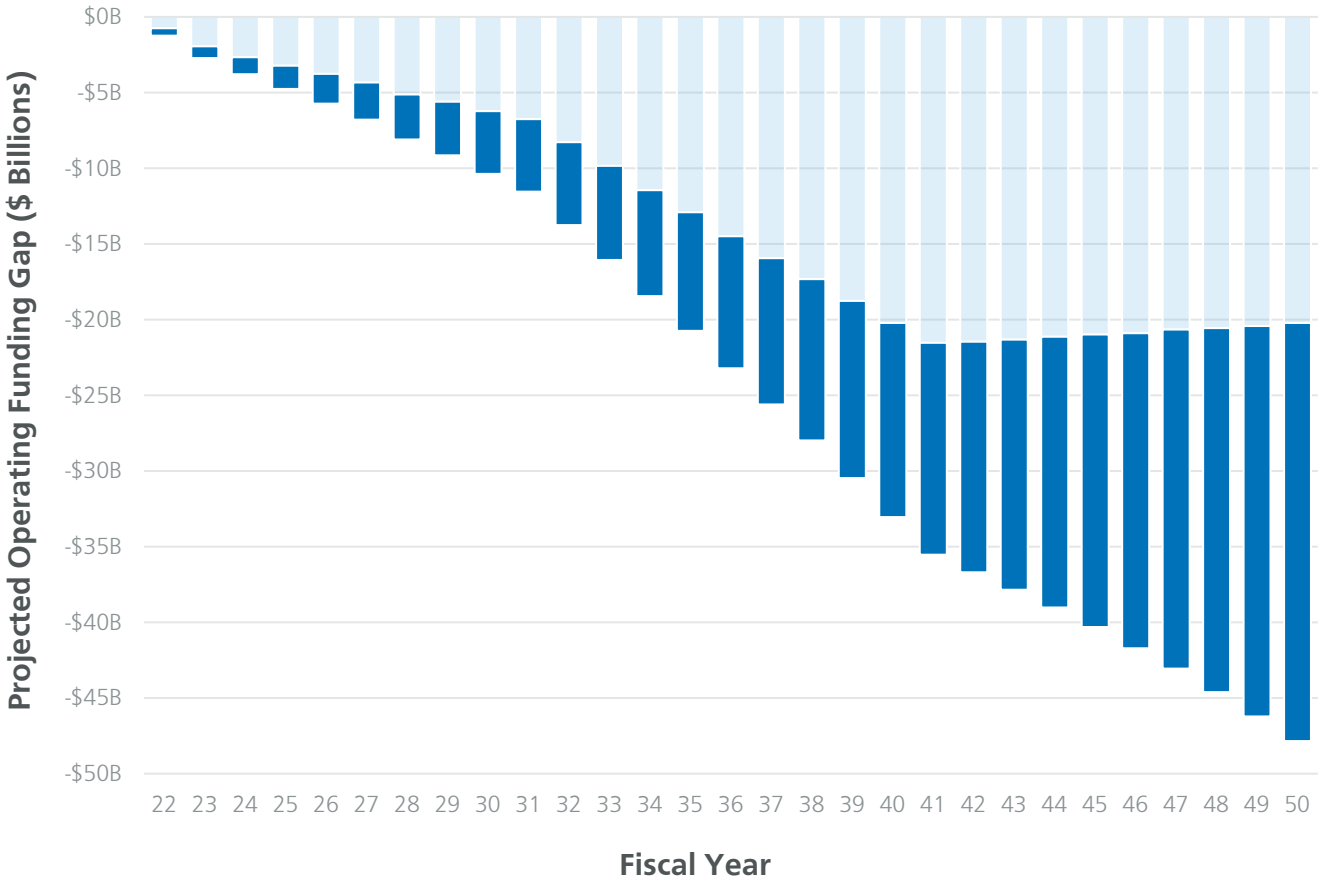


$674M

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



$921M

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.

Implementing SF Vision

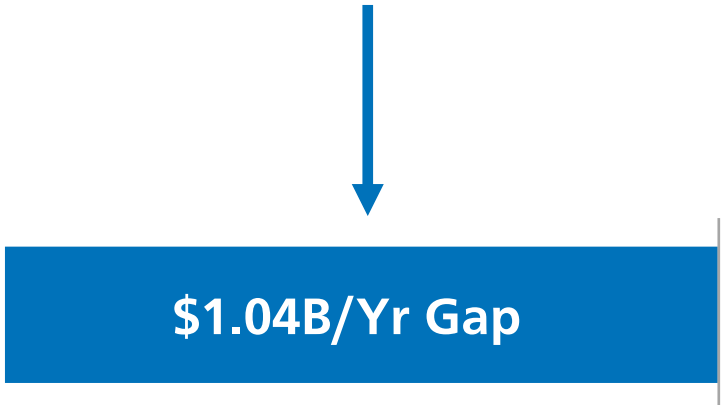
System in a state of good repair. Maintenance and asset replacement done on-time. Return to pre-pandemic service in 2023. System is not expanded.

Focus on State of Good Repair

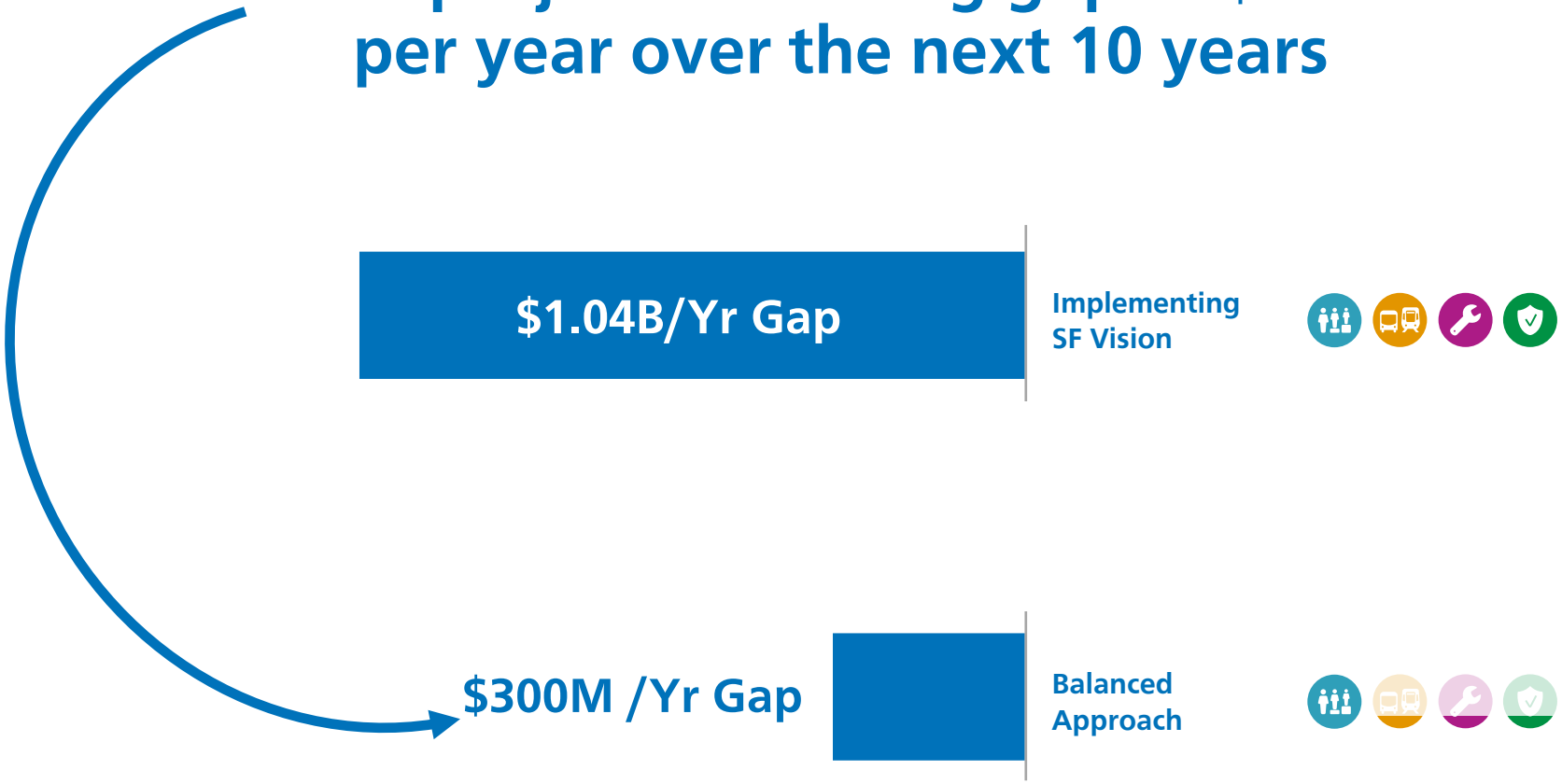
A mixture of core infrastructure, enhancements and expansion. Return to pre-pandemic service in 2023. Infrastructure replacement backlog does not grow.

Balanced Approach

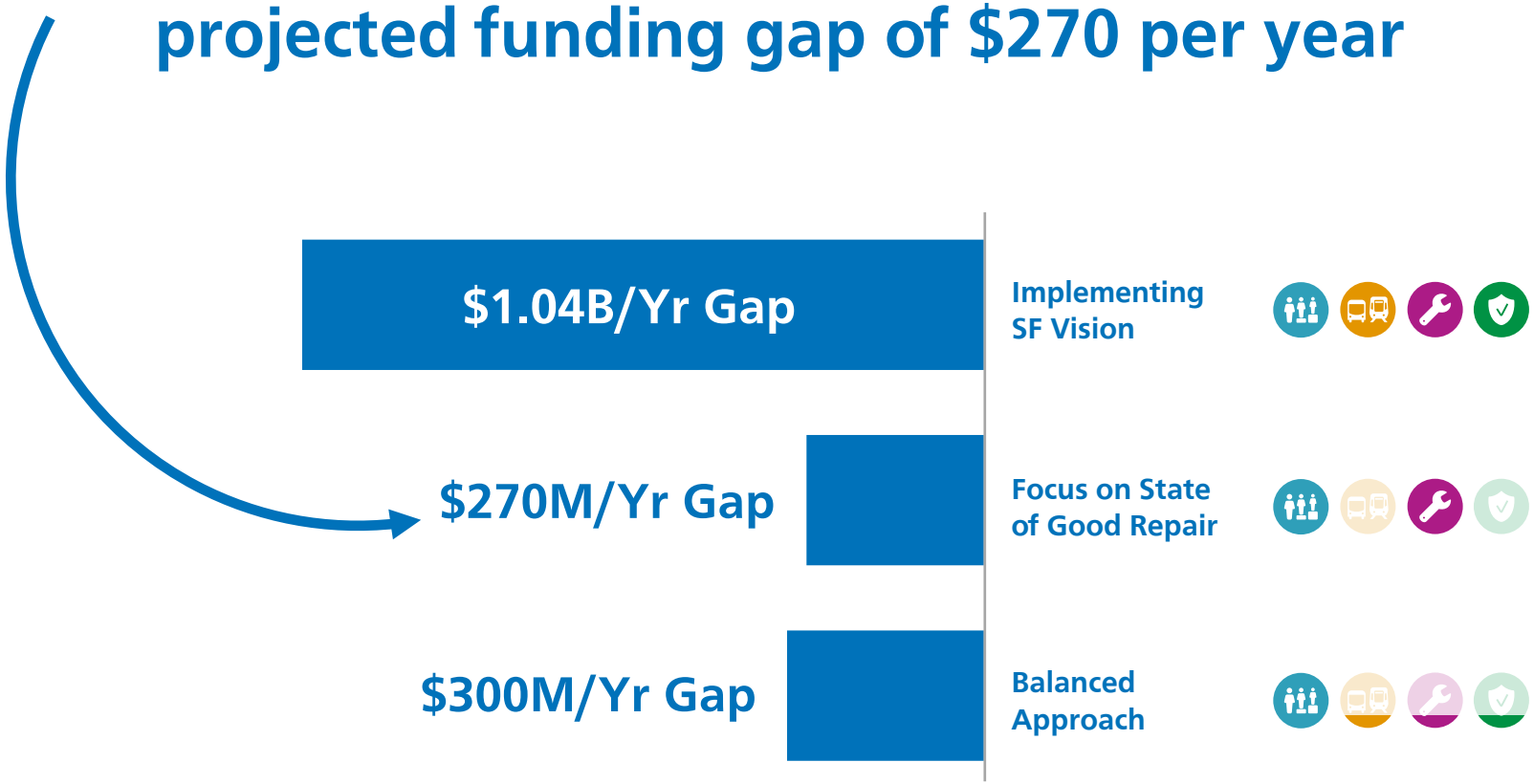
Over the next 10 years, the gap will be $1.04B per year on average



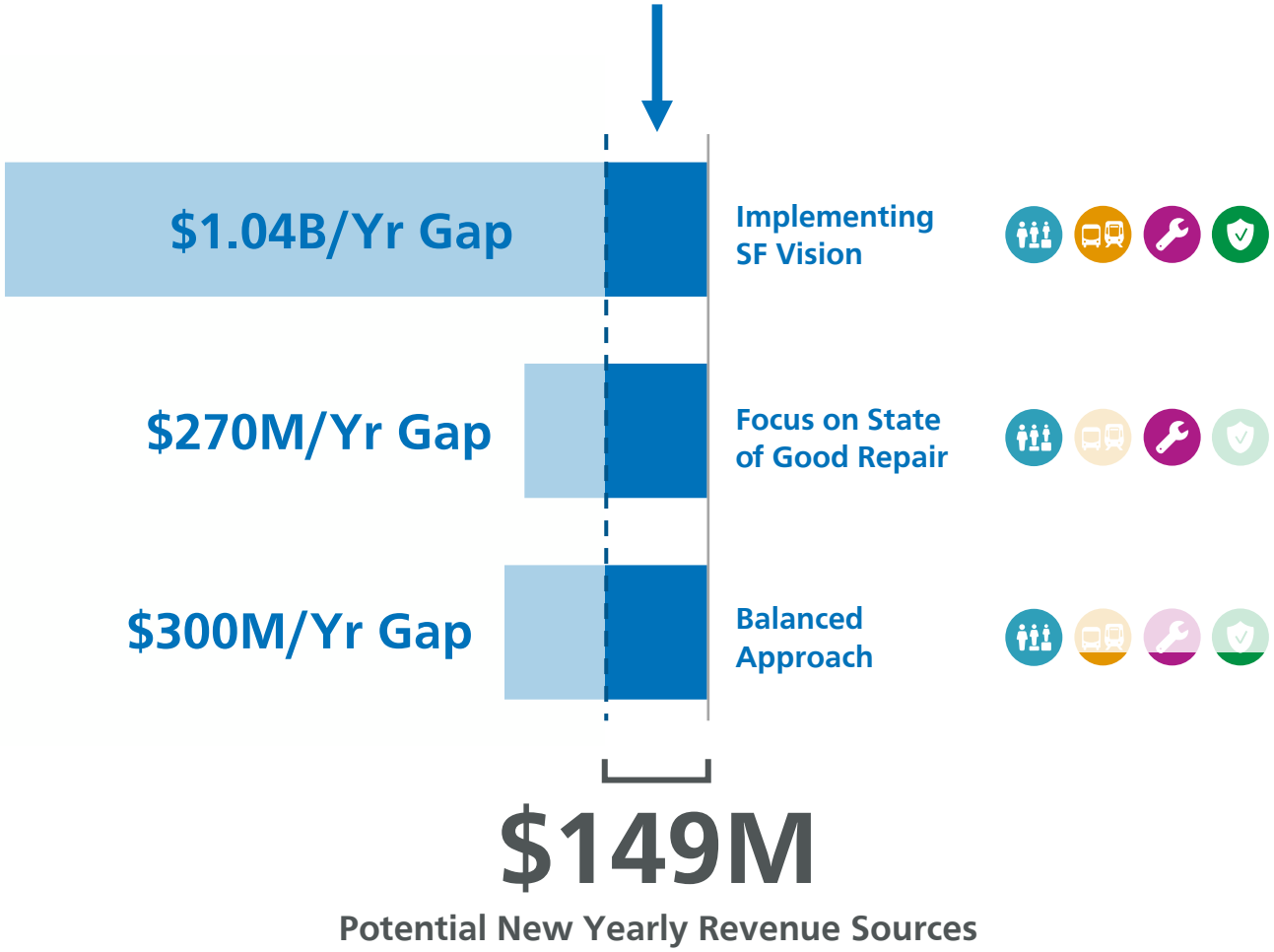
Even with a balanced approach, there's still a projected funding gap of $300M per year over the next 10 years



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



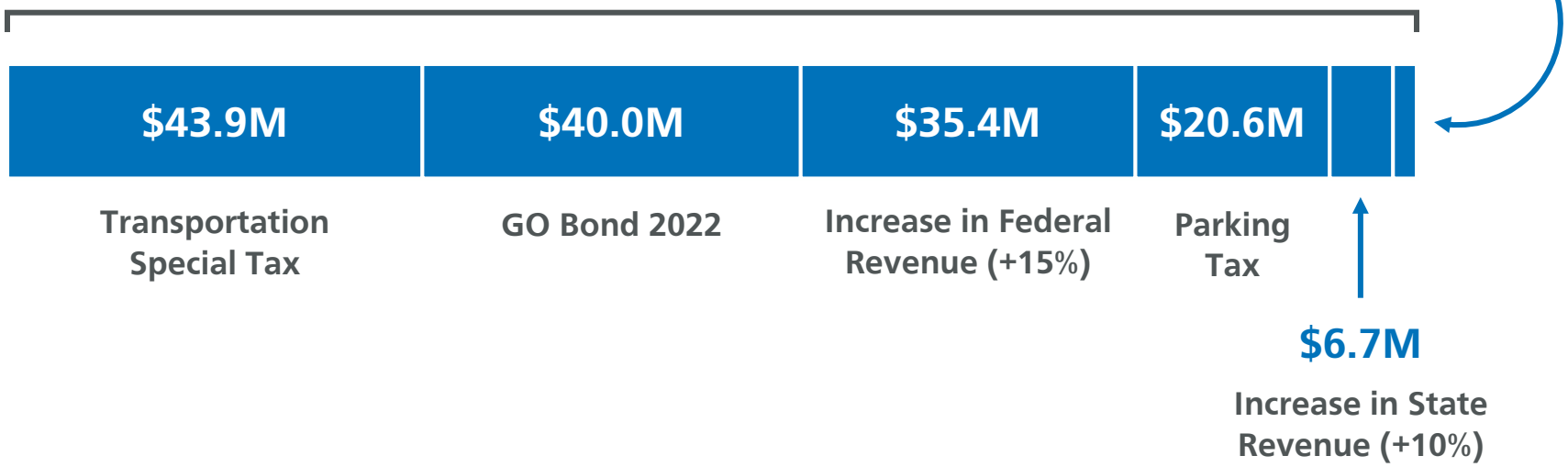
We've identified some new potential revenue sources, which combined could amount to $149M per year



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.

$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

$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.

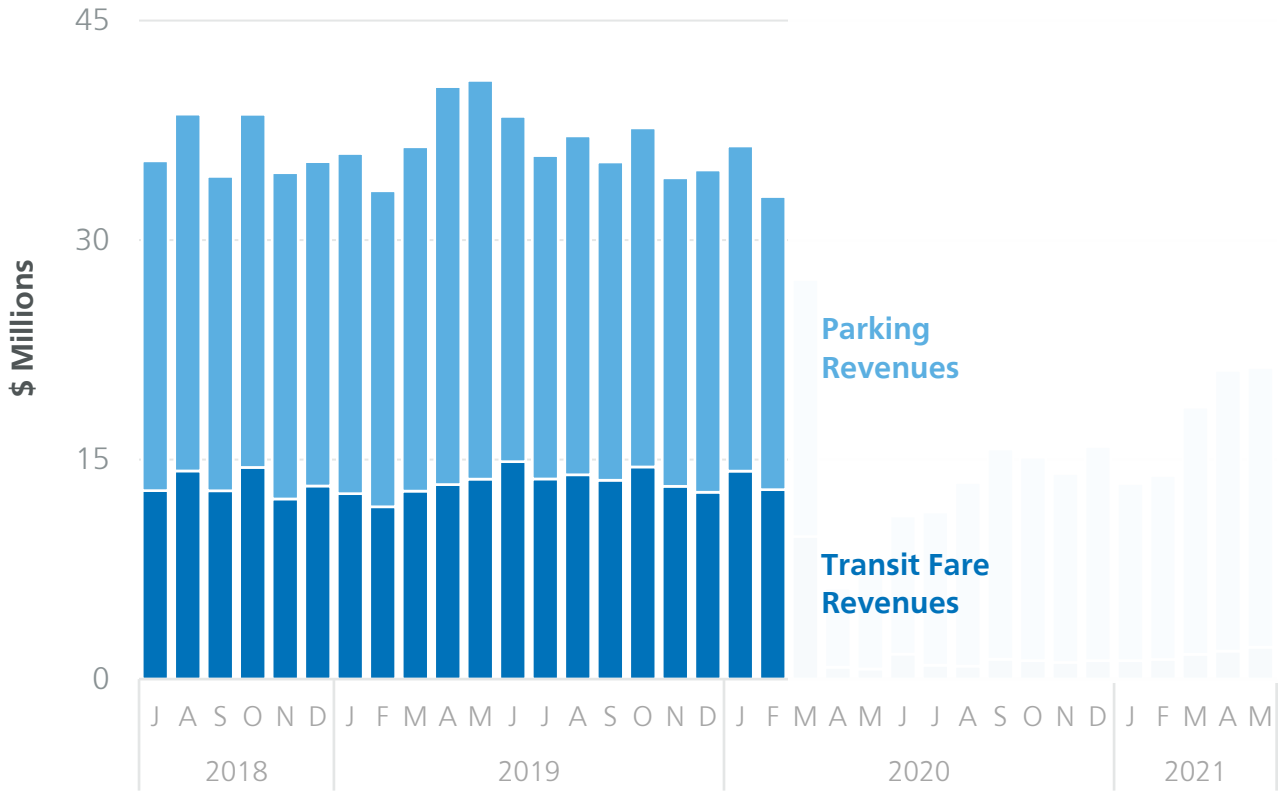
San Francisco
TRANSPORTATION 2050

Appendix.

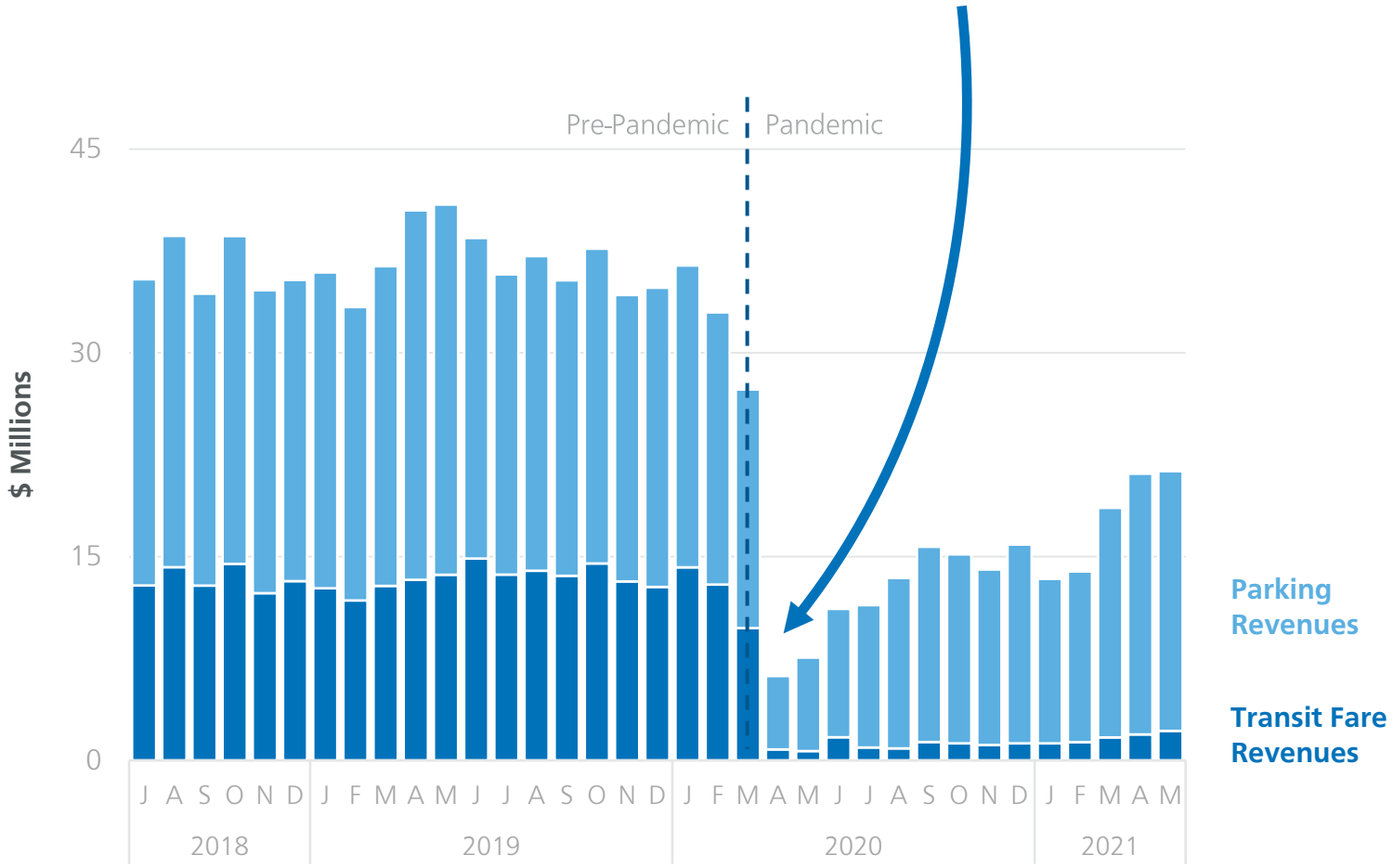
San Francisco
TRANSPORTATION 2050

Impacts of COVID-19 / FY19/20

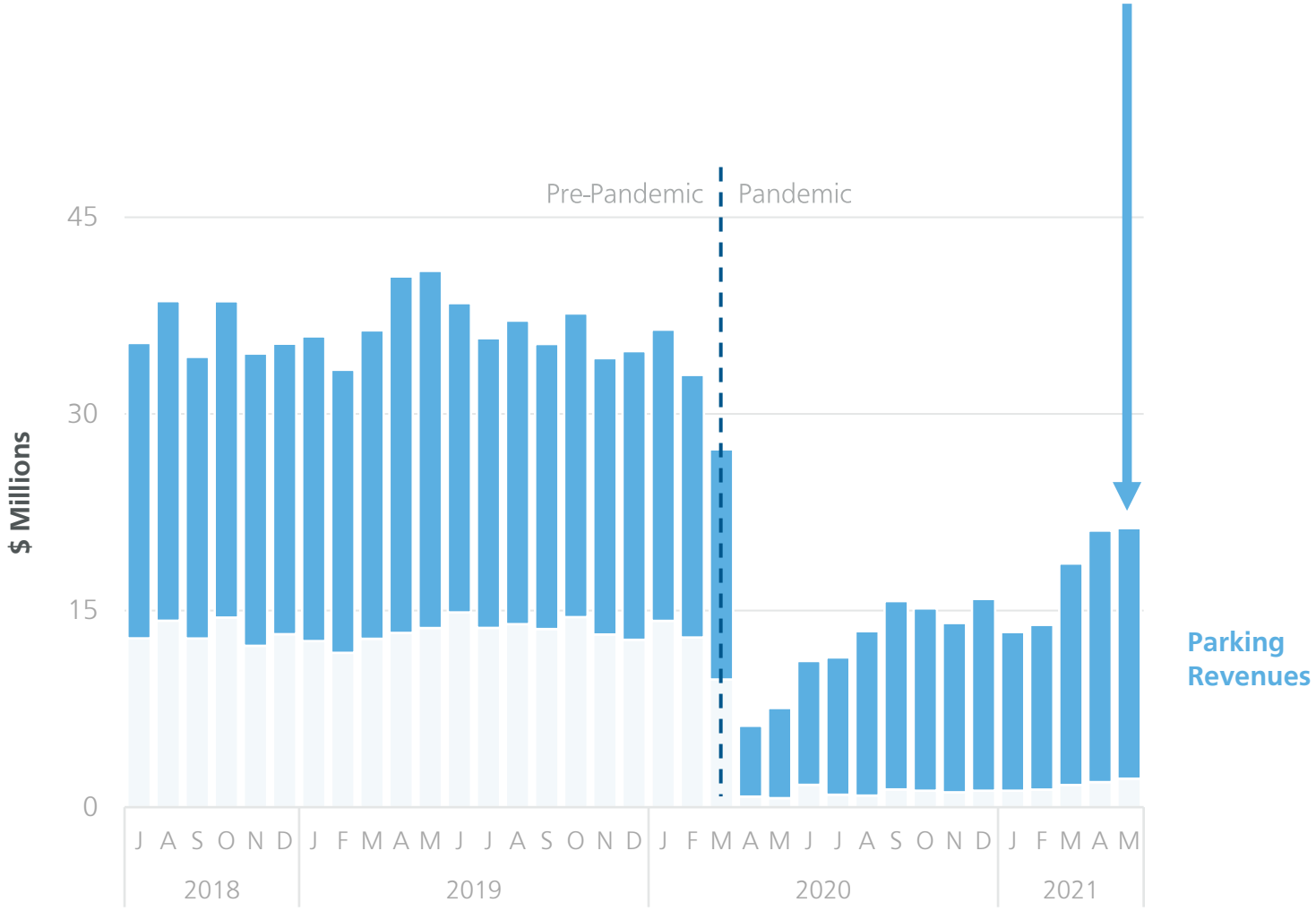
Parking and transit revenues were relatively flat in the months leading up to February 2020



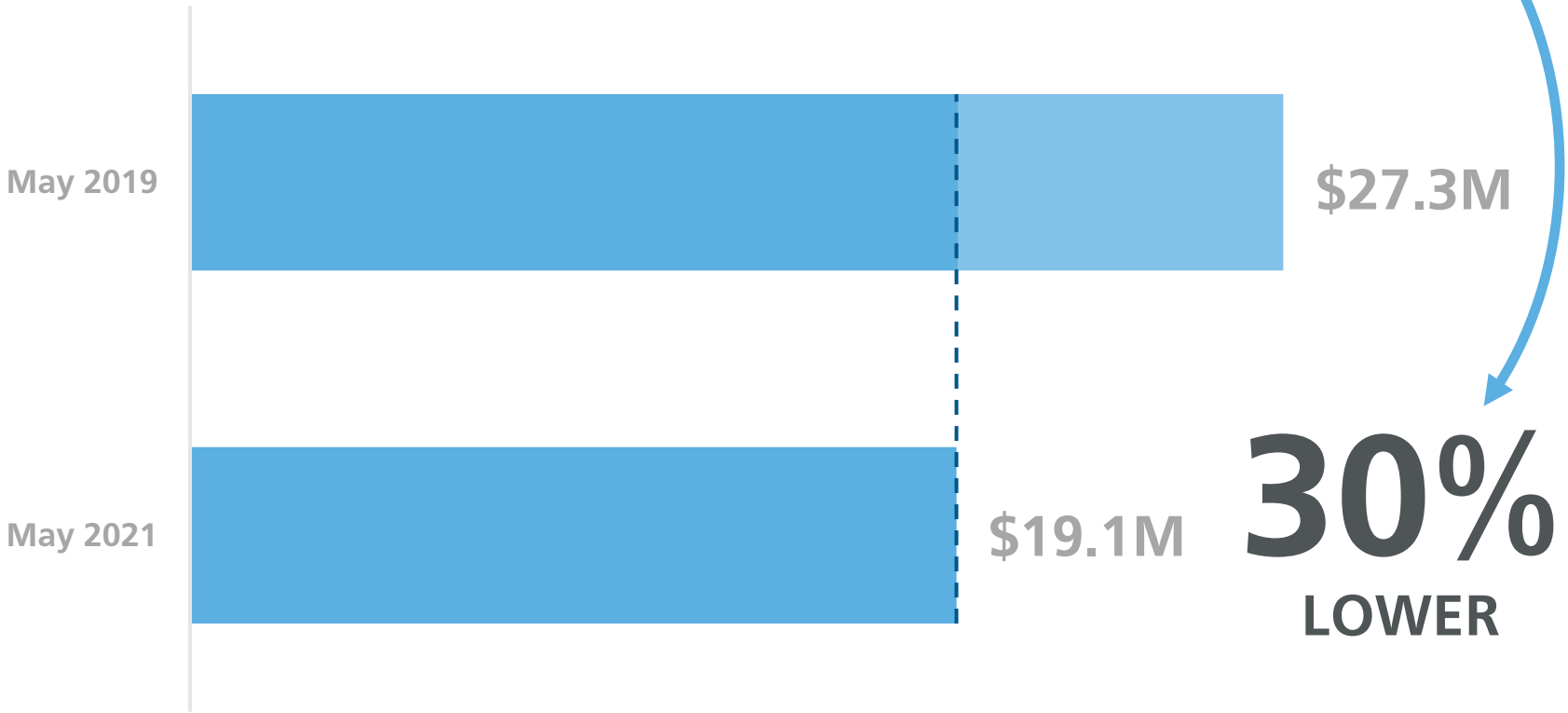
But after March 2020, the pandemic cratered both revenue sources



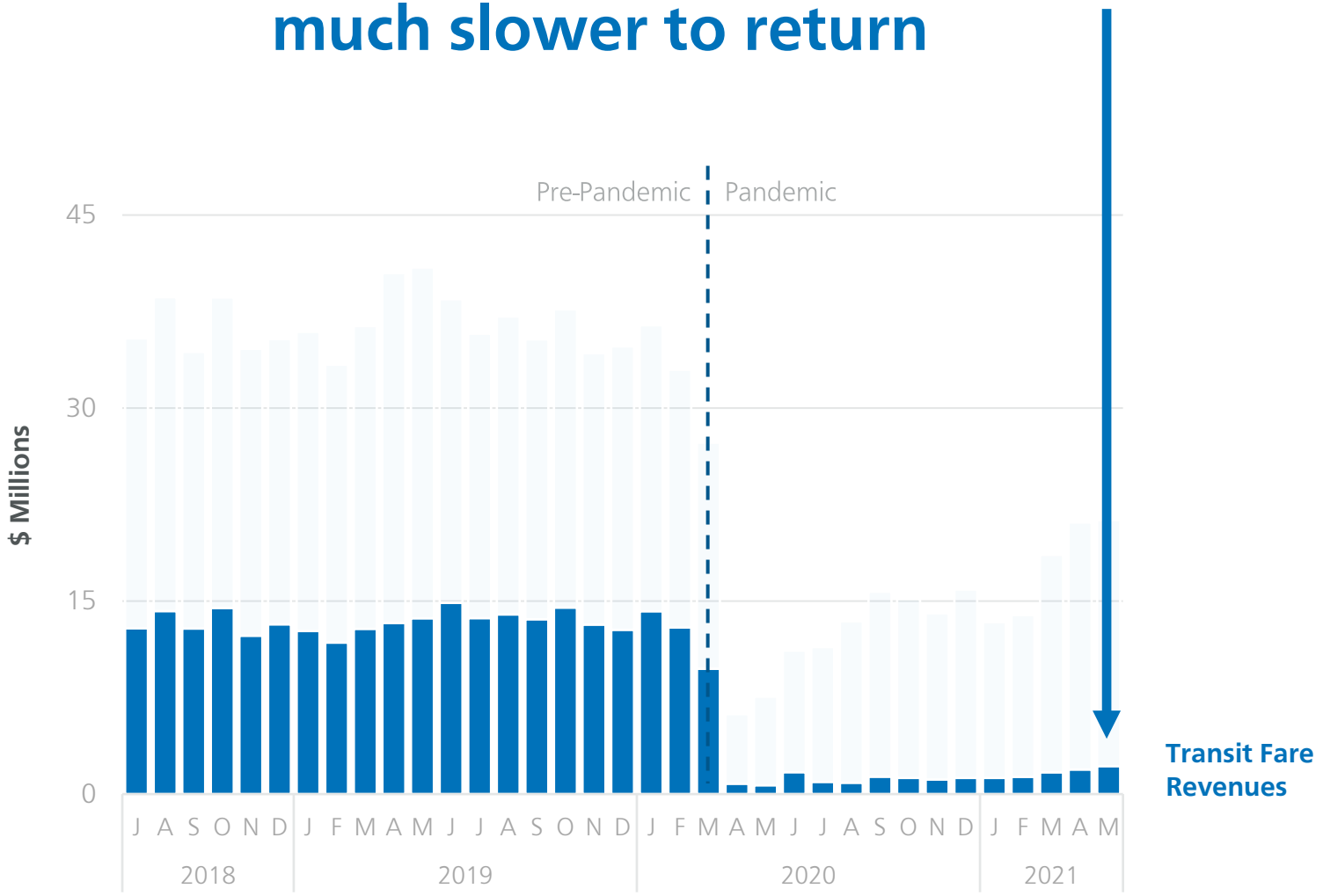
Parking revenue has partly bounced back



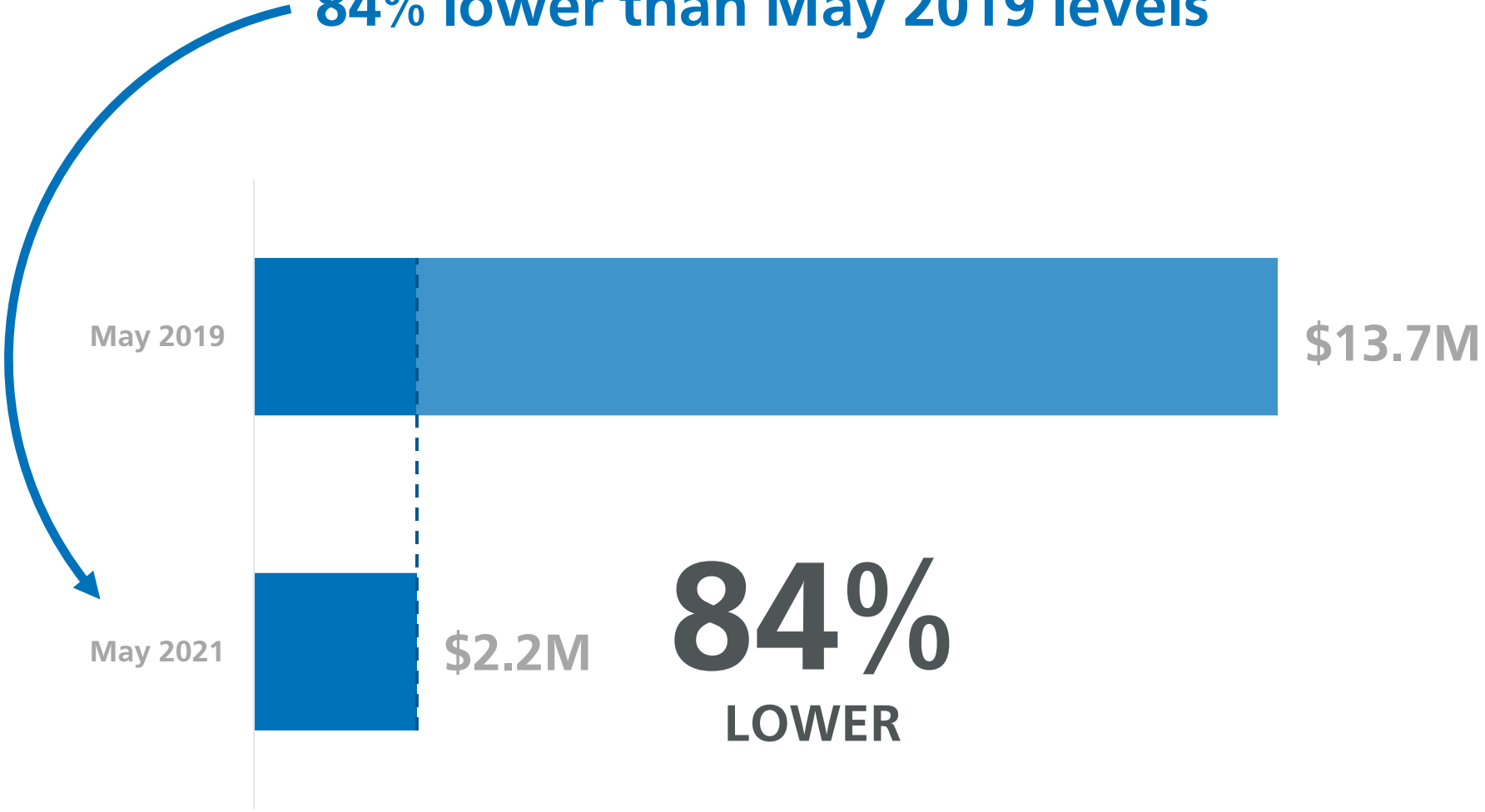
But May 2021 parking revenues were 30% lower than May 2019 levels



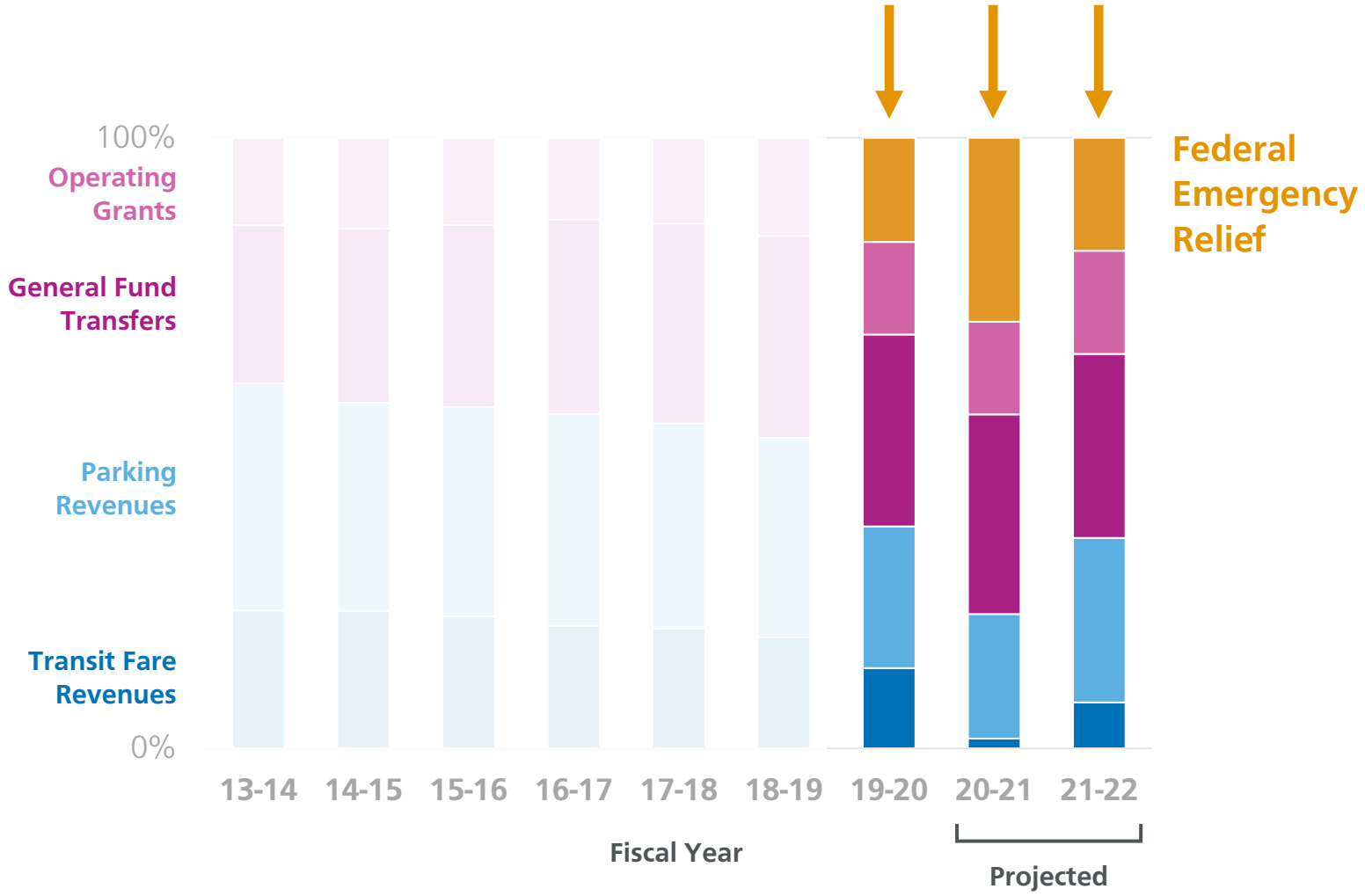
Meanwhile, transit revenues have been much slower to return



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

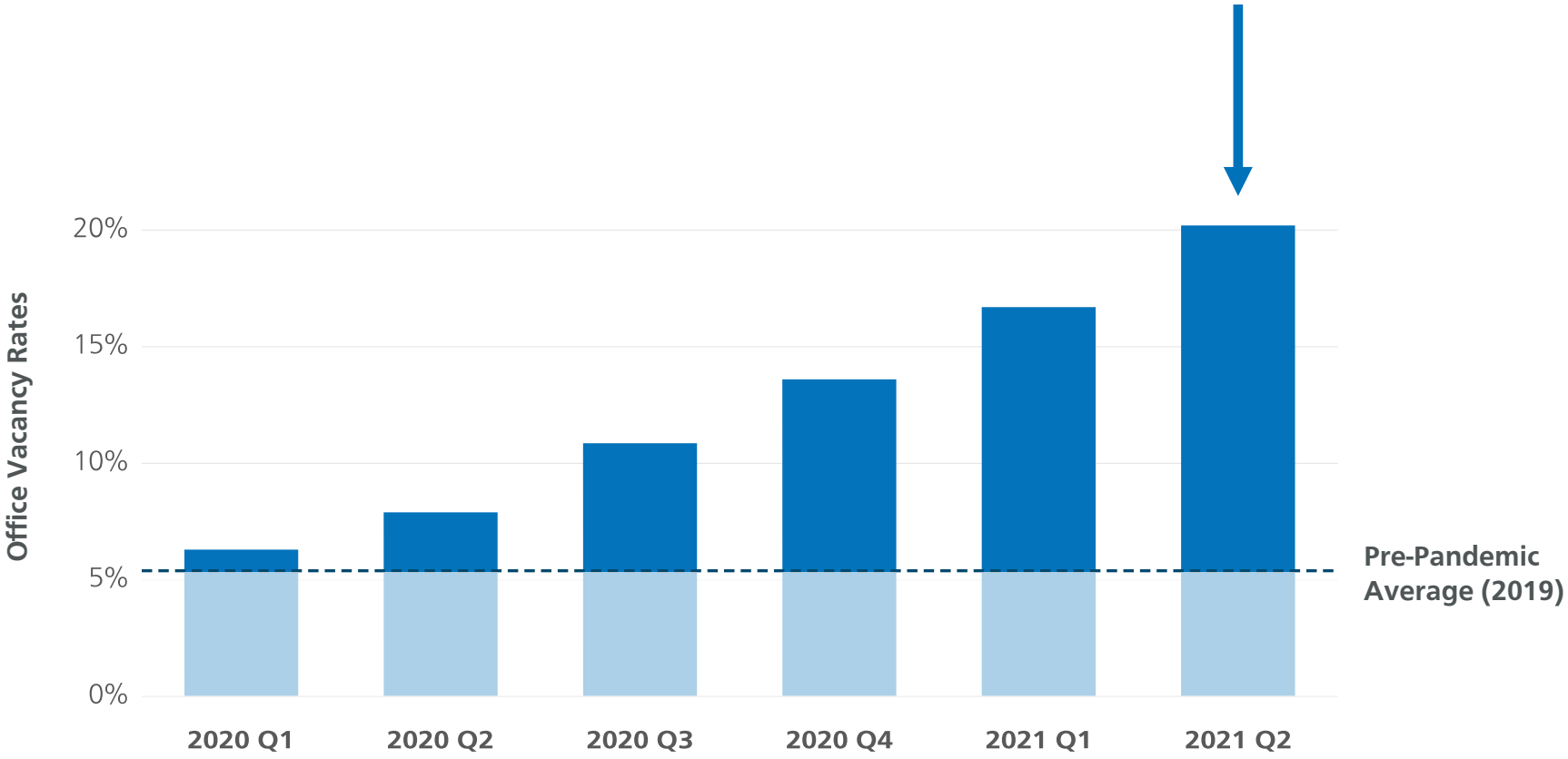


In the near term, federal emergency relief funding will be a necessary stopgap



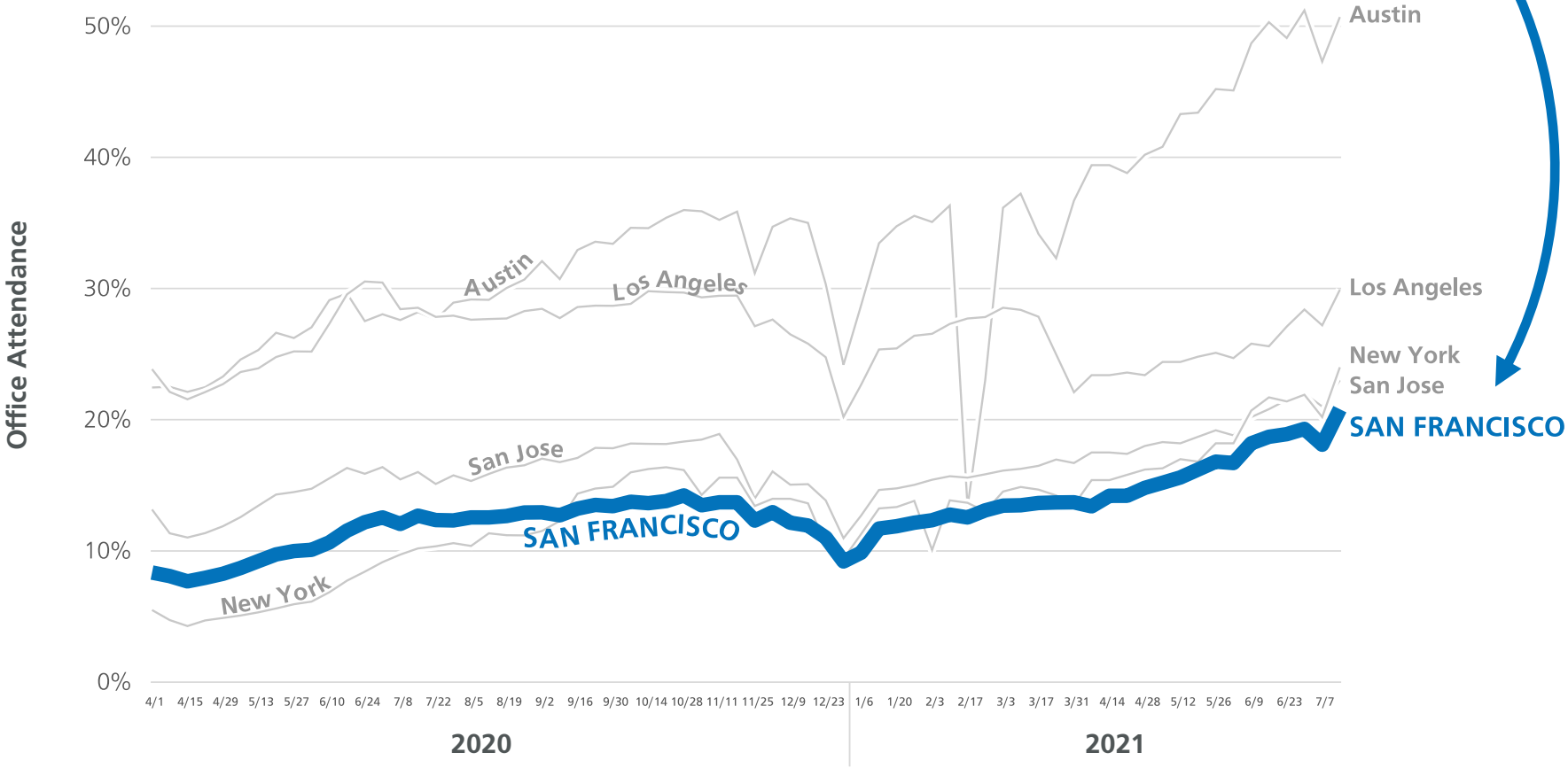
All signs point to a slow recovery for Downtown San Francisco

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



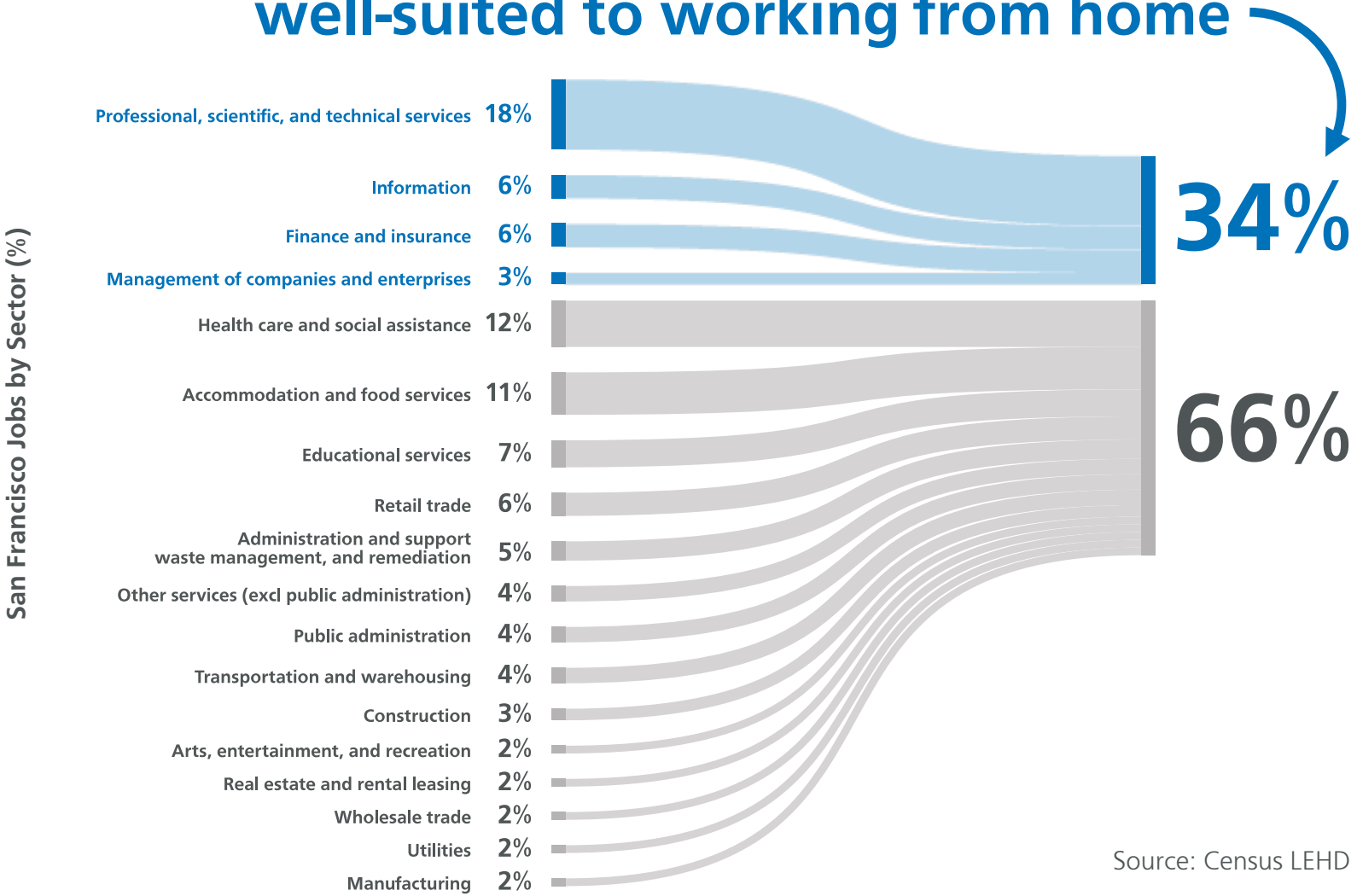
Source: Jones Lang LaSalle, via SF Office of the Controller

“SF Metro lags” comparable metro areas in office attendance



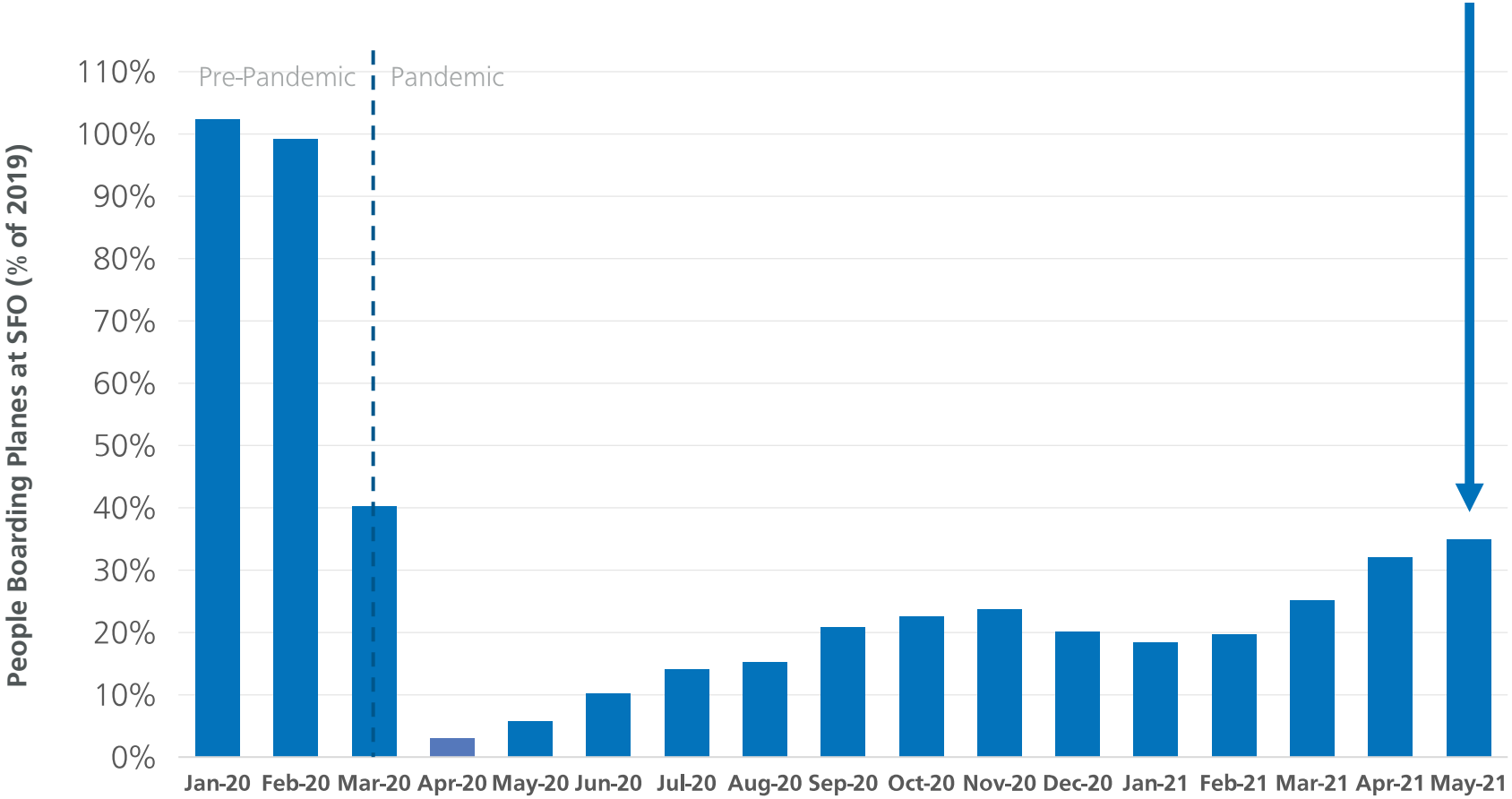
Source: Kastle Systems, via SF Office of the Controller

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



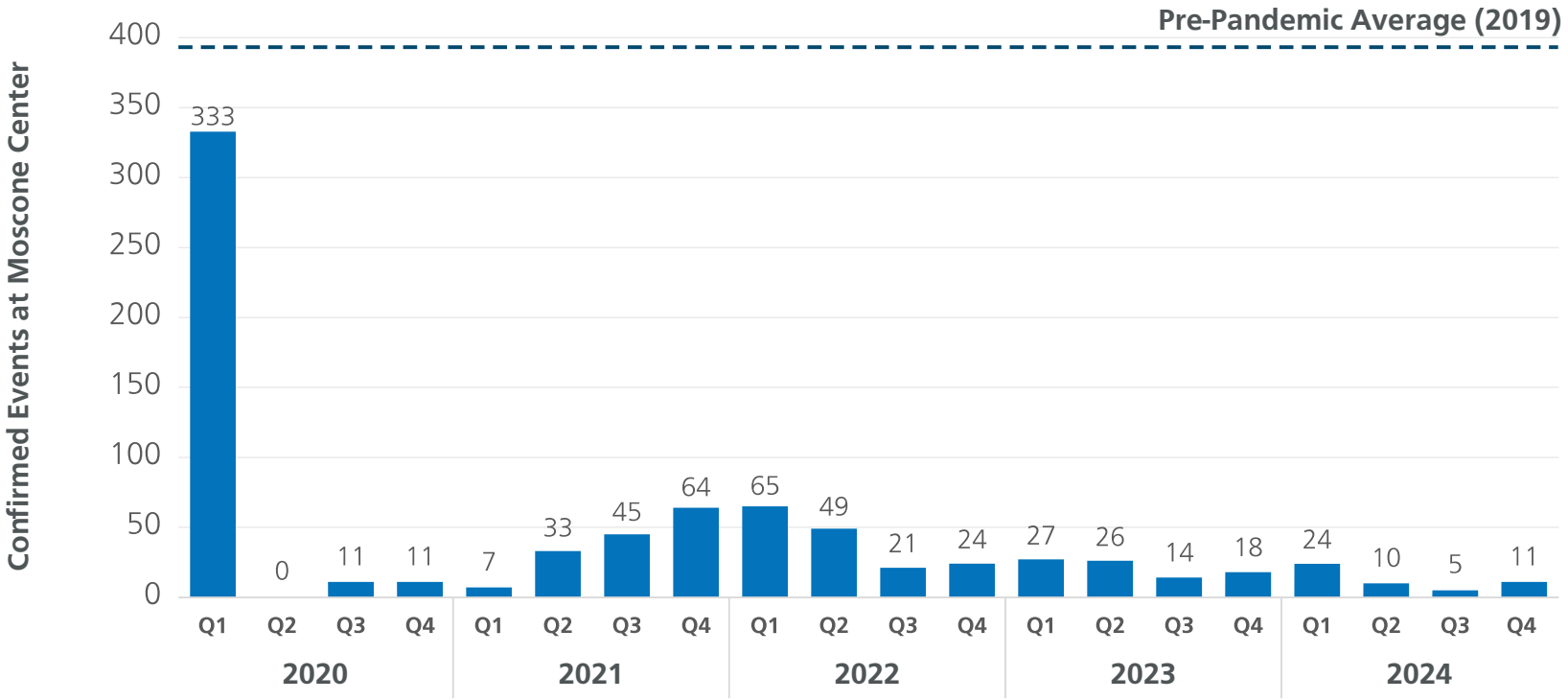
Source: Census LEHD (2018)

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



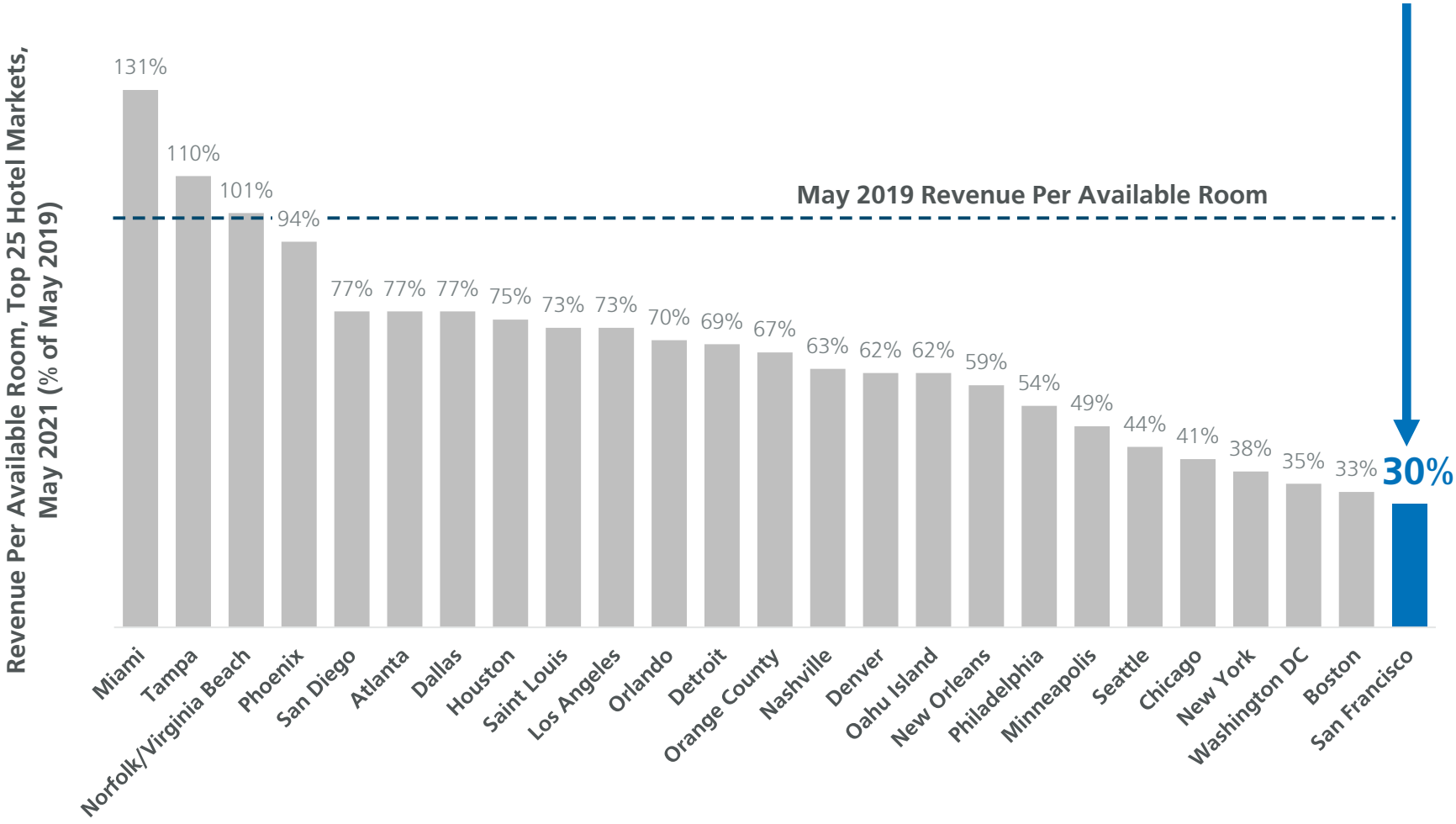
Source: San Francisco International Airport (SFO), via SF Office of the Controller

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

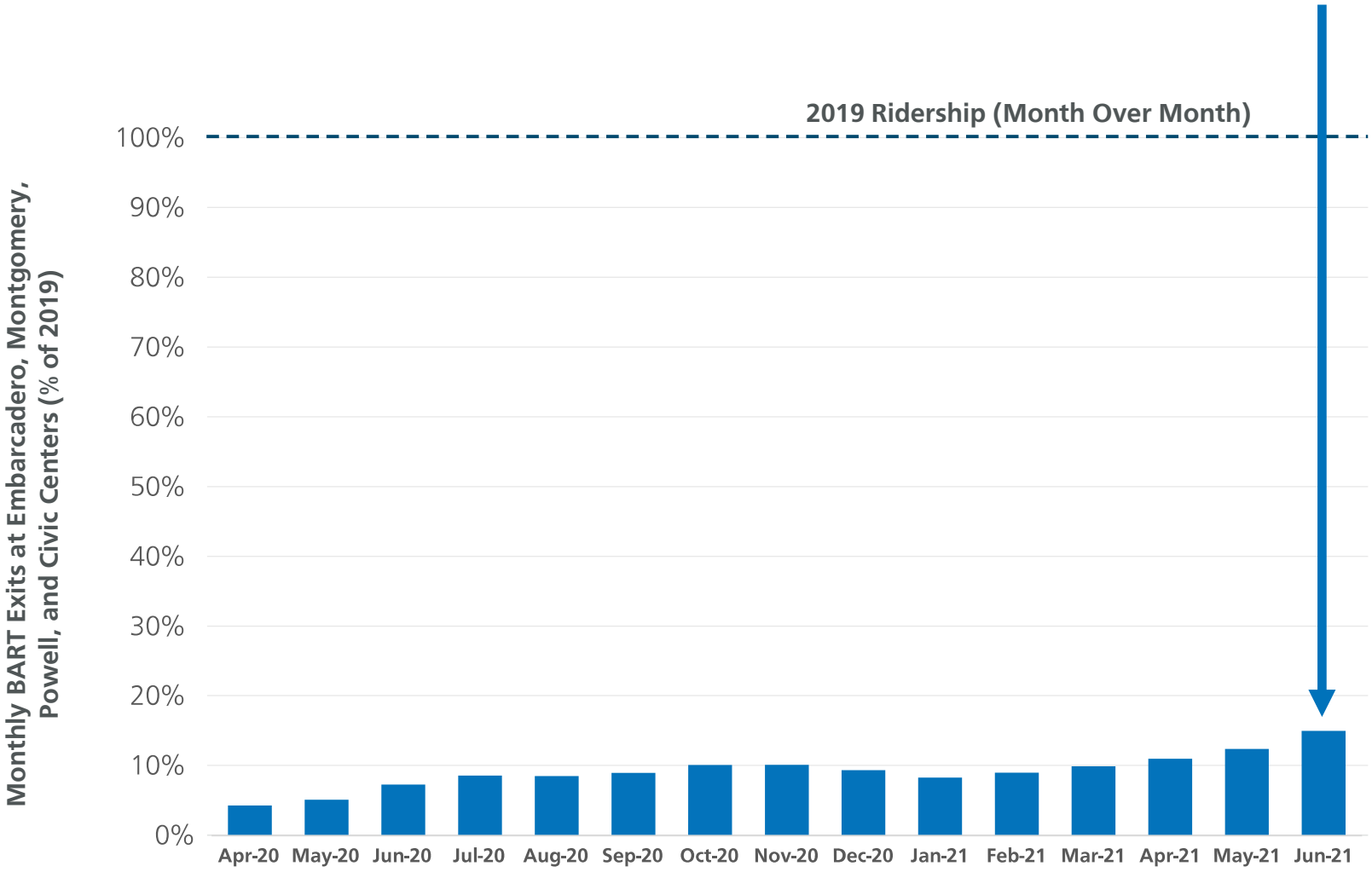
Visitor spending "will not be back to 2019 levels before 2025"

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

San Francisco County Transportation Authority

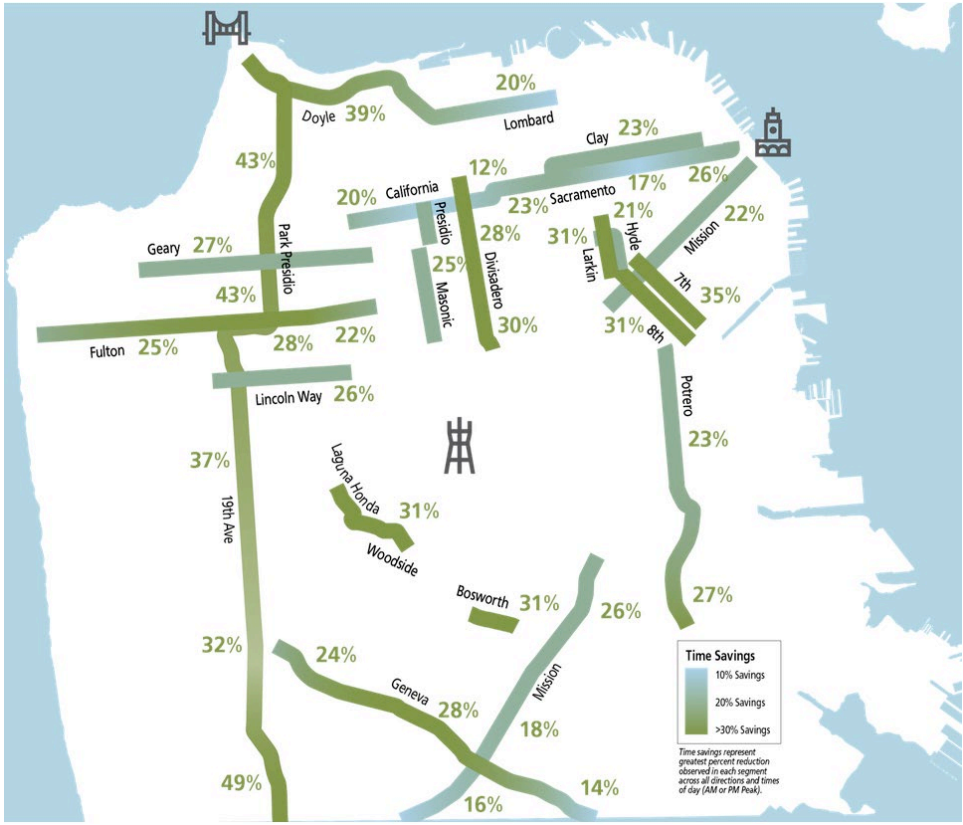
SFMTA

San Francisco Planning

SAN FRANCISCO
Office of Economic and Workforce Development

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

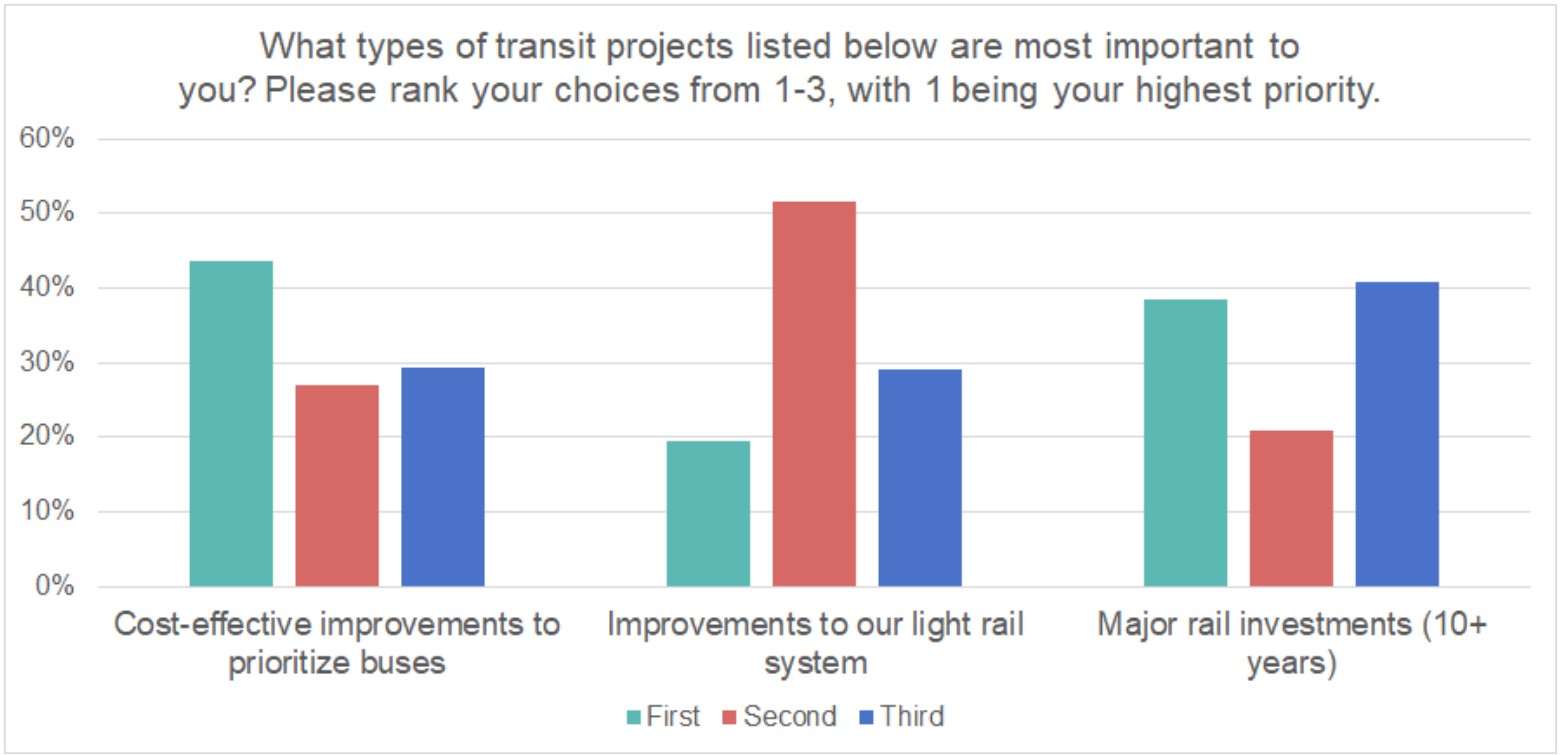
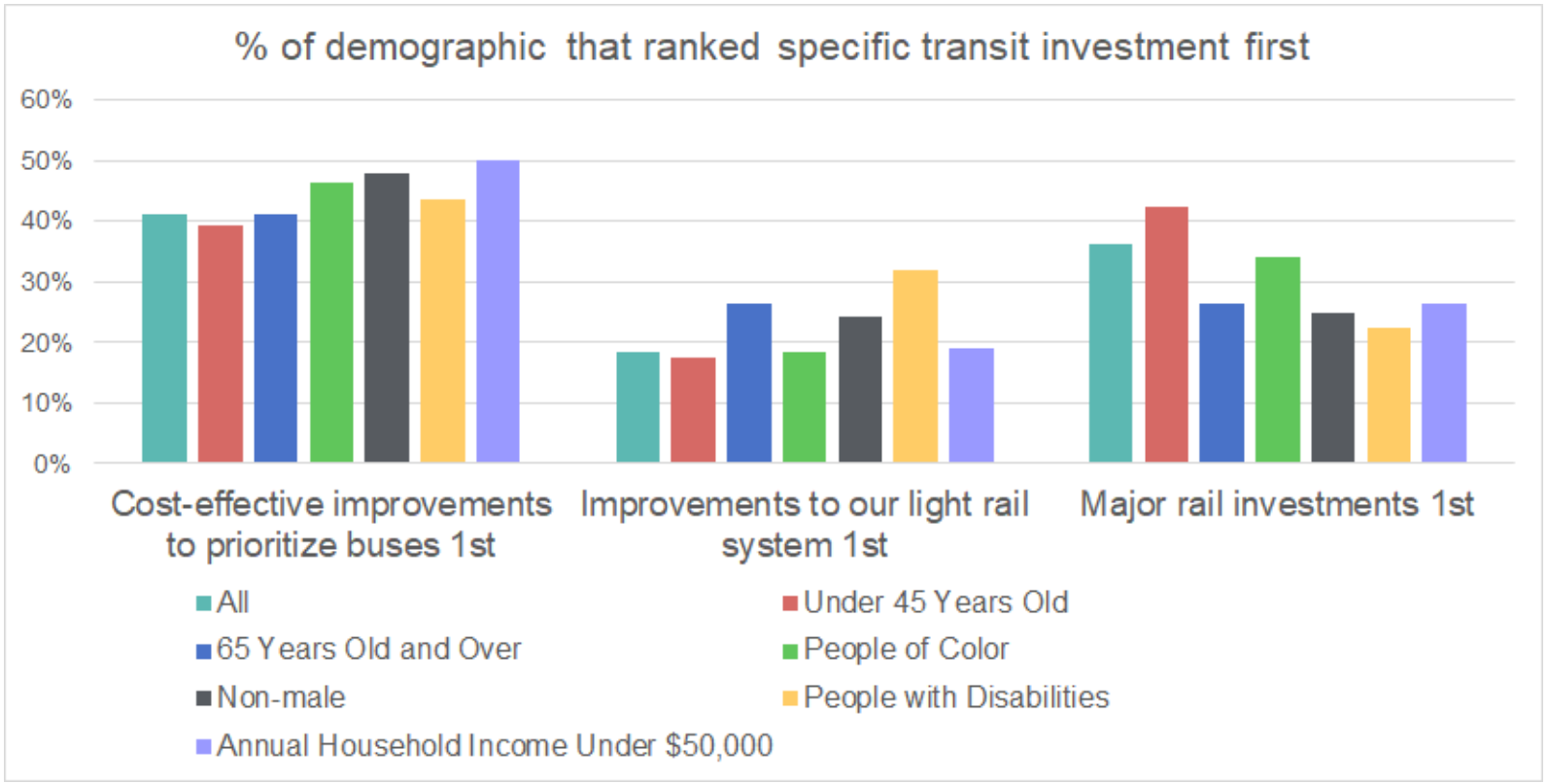
Transit Investment Strategy Storymap remains available for public viewing

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