The Role of Shuttle Services in San Francisco’s Transportation System

Final Strategic Analysis Report (SAR)

SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY
TWG
June 16, 2011
SAR Background

- Rapid growth in shuttle provision and ridership in last decade
- Public and neighborhood concerns regarding local impacts
- Interest in better organizing downtown area shuttle operations

- SAR Focus Areas:
  - Regional employer-based Shuttles
  - Downtown employer/property-owner Circulator Shuttles
Review of Key Issues

- Regional Employer-Based Shuttles
  - What are the benefits and impacts of current services?
  - How can operational and neighborhood impacts be addressed while maintaining benefits?
- Downtown Employer/Property Owner Circulator Shuttles
  - What is the efficiency of these existing services?
  - What are the potential models/opportunities for consolidation?
Considering subset (4 large regional employers):

- Over 2000 employees
- About 50 stops
- About 55 vehicles
- Mix of large (40-passenger) and small vehicles (25-passenger)
- All use B20 biodiesel fuel blend
- Provide direct service to/from neighborhoods or transit hubs
Estimated Benefits of Regional Shuttles

- **Congestion:** 63% of riders would have otherwise driven alone
  - 320,000 avoided trips per year (20M VMT avoided)
- **Emissions:** CO\textsubscript{2} emissions reduced: 8,000 - 9,500 tons/yr
- **Workforce:** shuttles aid retention/recruitment and productivity
- **Economic Impact:** approximately $1.8M of local spending per year
- **Accessibility:** 62% of riders say shuttles impacted residential location decision
  - 28% of riders do not own personal vehicles

*Note: estimates based on a survey of 1000 riders of top 4 South Bay/Peninsula employer providers*
Regional Shuttles – Summary of Public Feedback

- Overall public opinion is pretty evenly split between supporters and opposers.
- Neighborhood survey respondents cited the following specific impacts most frequently:

  - Safety Issues
  - Noise on Residential Streets
  - Vehicle Size
  - Local Pollution
  - Traffic Congestion at Stops and Turns
  - Commuter Parking
  - Conflicts with Muni Operations

Source: 2009 survey of residents in the Marina, Noe Valley, and Glen Park and comments received from the public.
Regional Shuttles – Key Findings

- Employer-based shuttles play a valuable role in the regional transportation system

- Impacts are highly localized and especially notable in the following areas:
  - Frequent use of Muni zones with some bus, traffic conflicts at stops
  - Large vehicles impede visibility and operations on some streets
  - Lack of transparency hinders public accountability

- Shuttle sponsors and operators seek clear operating guidance, coordination with City

- SFMTA lacks staff capacity to respond to industry and public shuttle-related needs
Downtown Employer Shuttles

- More than 10 separate providers
- Circulate between workplace and transit hubs
- Closed service; not open to general public
- A few provide service as development mitigation
- Most serve as transportation demand management and recruitment strategy

Source: SFMTA
Downtown Shuttles – Key Questions

What is case for consolidation?

- Utilization ranges between 55% - 95% occupancy in PM
- No/minimal conflicts at transit hubs

What are the options for consolidating service?

- Private: two employers have already combined service
  - Obstacles: liability, organization/governance, upfront costs
- Public/Private: several public/private provision models
  - Obstacles: ‘making the case’ for public investment, security concerns, potential demand effects once service becomes “open” to the public
Downtown Shuttles – Key Findings

- Some existing shuttles are underutilized, redundant
- Consolidation of existing private shuttles appears to be warranted
  - Phased approach is preferred (private consolidation first)
- Companies seek public sector guidance/support
  - TDM Partnership Project: TMAs; Muni Partners
- Case for transition from “closed” private service to “open” public service needs further study
  -Potentially innovative way to augment traditional service
  -Current Alternative Transportation Service Delivery Options SAR is investigating
Shuttles play an important and growing role in SF’s transportation system

- More formal management and recognition of shuttles is needed
- Establish Muni Partners program at the SFMTA
  - Fee-based program/certification (TDM Partnership grant provides seed funding for pilot)
  - Designated shuttle staff (SFMTA TDM coordinator already hired)
  - Lead service planning coordination
  - Investigate and respond to public complaints/inquiries
  - Monitoring and evaluation
  - Coordinate with related SFMTA curb-use and related TDM policies
Next Steps: TDM Partnership Project

► Partner Agencies:
  ► Transportation Authority, SFMTA, Dept. of Environment, Planning Dept.

► Funding:
  ► $750,000 MTC Grant
  ► Prop K, TFCA proposed for local match

► Project Components:
  ► Muni Partners program launch
  ► Citywide TDM Policy Review and Reform
  ► Development of 3 “Flexible TMAs”
  ► SF Parking Cashout program pilot
Thank you!

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SAR Development

- Previous Draft Final Report released in June, 2010
- Recommended SFMTA establish a Muni Partner’s Program, including dedicated staff member to coordinate shuttle issues, supported by voluntary membership fees
- Authority CAC requested further analysis, outreach
  - Further analysis of shuttle impacts (especially at transit stops)
  - Re-consider recommendation regarding voluntary fee program
- MTC Bay Area Climate Initiative (BACI) Grant (late 2010)
  - Authority and City agencies partner on application for a San Francisco TDM Partnership Project
  - $750,000 grant awarded to Authority in early 2011
Background

What is a shuttle?

- Shuttles in SF
  - Regional
  - Local circulator
  - Institutional
  - Community-Based

- Inventories from 2004 (BAAQMD), 2008 (MTA)

- Reasons for service and growth
  - Congestion
  - Gaps
  - Recruitment/Retention
  - Lack of parking at provider locations
  - Development impact mitigation

Existing regulations

- CPUC, SFPD, SFMTA, Planning Department
Variety of Impacts

► Transportation Impacts.
  ► Conflicts with Muni vehicles at bus stops, loading can take longer than typical Muni dwell
  ► Double-parking and large vehicle size can limit visibility for bicyclists, peds and other motorists
  ► Blocking of traffic in adjacent mixed lane

► Emissions.
  ► 2000 tons/yr of CO2 (25% of emissions for corresponding # of autos)

► Safety.
  ► No collisions in FMCSA database between 2006-2008.
  ► Large vehicles exceed design standard of some residential streets.

► Quality of Life.
  ► Some noise and vibration impacts associated with idling; visual impact of large vehicles
## Methodology

### Technical Assessment

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<td><strong>Neighborhood meetings</strong></td>
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Relevant existing regulations

- **California Public Utilities Commission (CPUC):**
  - Grants operating authority
  - Stipulates participation in DMV pull-notice program
  - Investigates public complaints

- **SFPD:**
  - Weight restrictions (3 and 9 ton, fine is $103)
  - Idling (5 min per code, fine is $103, 3 min max per Muni)

- **SFMTA:**
  - Bus Zone restrictions (no one except Muni buses allowed in zones, fine is $251)

- **SF Planning:**
  - Component of development mitigations
“Muni Partner” Certification

- Physical designation: Program identifier, contact number
- Collaborative model of coordination and communications
- Possible membership tiers ($ supports MTA staff position):
  - **Basic** – sponsor registers and provides profile information along with routes, stops, and fleet information. Companies with basic membership could potentially be rewarded with greater access to grant funds or public infrastructure incentives.
  - **Enhanced** – Higher/more sophisticated fees (by stop, route or number/type/size of vehicle), for more extensive operations.
- Provide integrated shuttle coordination among City agencies
- Voluntary
Muni Partners would collaborate closely with the SF Shuttles Coordinator to jointly establish detailed guidelines and rules, clarifying where or how operators must/should/may/may not operate.

- **Planning Criteria**
  - Routes, shared or dedicated stops

- **Operating Criteria**
  - Idling, zone sharing, parking/layover locations

- **Vehicle Thresholds**
  - “No more impactful” than Muni vehicles (3 minutes idling, 83 dBA for noise)
  - Better match vehicle size to street design