



# Request for Information

## for Future Lombard Crooked Street Paid Reservation System Project

DATE ISSUED	RESPONSES DUE	CONTACT
August 21, 2019	September 16, 2019 at 11:00 a.m. (electronically)	Steve Stamos Senior Management Analyst 415.522.4817 <a href="mailto:steve.stamos@sfcta.org">steve.stamos@sfcta.org</a>

### SECTION I - NOTICE

Notice is hereby given that the San Francisco County Transportation Authority (Transportation Authority) on behalf of the District 2 Supervisor is requesting information from companies specializing in paid reservation or ticketing systems for a future system on the Lombard Crooked Street (1000 Block of Lombard Street between Hyde and Leavenworth streets). The purpose of this RFI is to 1) provide general information about the project, and 2) solicit input on the paid reservation system design, innovative ideas, potential risks, and the procurement and implementation process. An operating government agency anticipated to be designated by the San Francisco Board of Supervisors (BOS) in the coming months is expected to issue a Request for Proposals (RFP) for the paid reservation system implementation and operation in the fall. Submitting a response to this RFI is not a prerequisite to submit a proposal for the RFP.

**SITE TOUR.** Companies are invited to a site tour at the Lombard Crooked Street at 10:00 a.m. on Friday, August 30, 2019. The walking tour will last approximately 90 minutes and attendees are requested to meet at the northeast corner of Lombard and Larkin Streets. Please limit attendees to no more than two individuals per company for the tour. Attendees are requested to RSVP in advance per the below schedule at the following link: [www.sfcta.org/contracting](http://www.sfcta.org/contracting).

**QUESTIONS.** Questions may be submitted in writing by the stated deadline by e-mail to [info@sfcta.org](mailto:info@sfcta.org). Please include "RFI 19/20-02 - Lombard Reservation System Project" in the subject line. The Transportation Authority's responses will be posted to [www.sfcta.org/contracting](http://www.sfcta.org/contracting) by the date indicated in the schedule, and any addenda to the RFI will also be made available on that webpage prior to the response due date. At the Transportation Authority's discretion, responses to certain questions may be deferred and addressed in the RFP. Please see Section II for all important dates and deadlines.

Please do not directly contact any other Transportation Authority staff or members of the Transportation Authority Board with questions regarding this RFI.

Informational meetings will be held as described in Section VII.

## SECTION II - RFI SCHEDULE

DATE	PHASE/ITEM DUE
August 21, 2019	Release of RFI
August 29, 9:00 a.m.	Attendees of site tour required to RSVP at <a href="http://www.sfcta.org/contracting">www.sfcta.org/contracting</a>
August 30, 10:00 a.m.	Lombard Crooked Street Site Tour (90 minutes)
September 3, 5:00 p.m.	Companies to submit written questions to Transportation Authority
September 9*	Transportation Authority issues written responses to questions
<b>September 16, 11:00 a.m.</b>	Responses to RFI due electronically. Late submissions will not be accepted.
September 23*	Invitation(s) to informational meetings issued to responding companies*
Week of September 30*	Informational meetings* (scheduled if necessary)

\* *Subject to change*

## SECTION III - AGENCY BACKGROUND

The Transportation Authority was created in 1989 by the voters of the City and County of San Francisco (City) to impose a voter-approved transaction and use tax (i.e., sales tax) of one-half of one percent to fund essential traffic and transportation projects as set forth in the San Francisco County Transportation Expenditure Plan (Prop B Expenditure Plan) for a period not to exceed twenty years. Beginning in April of 1990, the State of California Board of Equalization started collecting the sales tax revenues for the Transportation Authority. In November 2003, San Francisco voters approved a new 30-year Expenditure Plan (Prop K Expenditure Plan) that superseded Prop B and continued the one-half of one percent sales tax.

The Transportation Authority Board consists of the eleven members of the Board of Supervisors (BOS) of the City, who act as Transportation Authority Commissioners; nonetheless, pursuant to California Public Utilities Code Section 131000 et seq., the Transportation Authority operates as a special purpose governmental entity, independent of the City.

The Transportation Authority is designated under State law as the Congestion Management Agency for San Francisco County. In this capacity, the Transportation Authority has a wide range of responsibilities which include preparing the long-range County-wide Transportation Plan, prioritizing state and federal transportation funds designated for San Francisco, developing and operating a computerized travel demand forecasting model, and implementing the state-mandated Congestion Management Program. The Transportation Authority is also the designated San Francisco Program Manager for the Transportation Fund for Clean Air Program, a state-mandated program that collects an annual vehicle registration surcharge and allocates the funds to transportation projects that improve air quality.

On November 2, 2010, San Francisco voters approved Proposition AA, establishing a new \$10 vehicle registration fee on motor vehicles registered in the City and designated the

Transportation Authority as administrator of the fee. Revenues are used for local road repairs, pedestrian safety improvements, and transit reliability improvements throughout the City in accordance with the voter-approved Expenditure Plan.

On April 1, 2014, the BOS adopted a resolution designating the Transportation Authority as the Treasure Island Mobility Management Agency (TIMMA) to implement elements of the Treasure Island Transportation Implementation Plan (TITIP) in support of the Treasure Island/Yerba Buena Island Development Project. The TITIP calls for, and TIMMA will be responsible for implementing, the Treasure Island Mobility Management Program: a comprehensive and integrated program to manage travel demand on Treasure Island as the development project occurs, including an integrated congestion pricing program with vehicle tolling, parking pricing, and transit pass components. Assembly Bill (AB) 141 (Ammiano), signed in 2014, established TIMMA as a separate entity, providing a firewall between TIMMA and the Transportation Authority's other functions.

## **SECTION IV - PROJECT BACKGROUND AND PURPOSE**

### **IV.A PROJECT BACKGROUND**

The 1000 Block of Lombard Street, known as the "Crooked Street," is both a residential neighborhood and one of the most iconic and most popular tourist destinations in San Francisco, attracting 2.1 million visitors a year. The increasing volume of visitors in the last several years has put a significant strain on the neighborhood's transportation infrastructure, resulting in automobile and pedestrian congestion that negatively impacts the quality of life in the neighborhood and surrounding areas. Visitors in line to drive down the Crooked Street are also experiencing increased wait times to drive down the block, often exceeding 45 minutes on the busiest days.

To address this situation, and at the request of former District 2 Supervisor Mark Farrell as part of the Neighborhood Transportation Improvement Program, the Transportation Authority completed the Managing Access to the Crooked Street Study in 2017 (2017 Study). One of the four key recommendations identified in the 2017 Study included the exploration of using reservations and pricing to manage automobile demand. The Transportation Authority followed-up with the Lombard Crooked Street Reservation and Pricing System Study (2019 Study) which recommends a paid reservation system, enforced by staff on-site, with up to 12-hour daily operations at peak seasons and a predictable tiered price structure (higher on holidays and weekends, lower during regular weekdays). The Transportation Authority Board is anticipated to finalize approval of the 2019 Study at its September 10, 2019 meeting.

Approval of enabling state legislation (AB 1605 Ting) is a prerequisite for the implementation of a program as recommended in the 2019 Study. The current form of the bill would allow the BOS to approve an ordinance that designates an operating government agency to administer a paid reservation pilot system for up to seven years from the beginning of the pilot program (i.e., the first day that a reservation may be made). The Transportation Authority is a sponsor of the bill. On behalf of District 2 Supervisor Catherine Stefani, an RFP is expected to be issued in fall 2019, contingent upon approval of the state legislation and BOS ordinance anticipated by November 2019. The ordinance will also

determine the government board or agency to operate the program. If this timeline is met, the pilot program could commence as soon as spring 2020.

The Transportation Authority has identified funding for start-up costs including initial operating costs for the first year of the program.

#### IV.B PROJECT PURPOSE

The primary purpose of the Lombard Crooked Street Paid Reservation System is to manage automobile congestion, especially during peak hours, by requiring visitors who drive down the street to have a reservation. The system would create reservation slots that limit automobile arrivals to levels within the capacity of the street.

The fee for a reservation helps support additional goals identified in the 2017 Study. First, the system is expected to achieve the goal of implementing a financially viable solution with funds generated from the reservation fee able to cover the cost of site operations, enforcement and maintenance related to the Crooked Street and Lombard Crooked Street Paid Reservation System. This will improve safety and the quality of life for residents of the Crooked Street and surrounding community. In addition, the system is expected to help preserve tourism at a sustainable level by providing visitors with a clear set of expectations for visiting by automobile; the ability to plan trips in advance; and shorter wait times to drive down the Crooked Street, thus creating a better experience.

#### IV.C SYSTEM LOCATION

The Lombard Crooked Street Paid Reservation System is intended to limit the number of automobiles traveling on the 1000 Block of Lombard Street between Hyde and Leavenworth streets (Figure 1 below).



**Figure 1. Context map of Crooked Street**

See Attachment 1 (Figure 2) for the Traffic Flow and Staff Locations in the Recommended Scenario from the 2019 Study. Under the proposed system, automobiles with reservations are expected to arrive at the Crooked Street on eastbound Lombard Street from the Lombard and Larkin streets intersection only. The 2019 Study recommends at least two

reservation system staff members: one at the Larkin Street and Lombard Street intersection advising motorists that reservations are required and one mid-block on Lombard Street between Larkin and Hyde streets to verify reservations.

#### **IV.D BUSINESS REQUIREMENTS**

The Transportation Authority assumes the functions and responsibilities outlined in this section can be provided by a Contractor selected through a competitive RFP process. These functions and responsibilities are also proposed in the Concept of Operations listed under Section IV.L Project Resources.

##### ***Technology Systems***

The Contractor is assumed to be able to design, implement, operate and maintain both the back end and front end of the reservation system – a user interface(s) that accept reservations as well as a database that keeps records of reservations. The system should have the following types of access:

- Visitor access via website, mobile device and telephone that allows for making a reservation and secure payment. Website should be mobile-phone friendly with the option to view it in multiple languages. No reservations or payments should occur with on-site personnel at the Crooked Street.
- Contractor access to verify reservations on-site and assist with data collection to monitor performance such as tracking the date, time and number of vehicles that transit the Crooked Street and whether reservations made are fulfilled. The Contractor is expected to provide any equipment or supplies that may be needed for this purpose (e.g. handheld devices, wireless internet hotspot). The system would also require access for customer service personnel to assist visitors with specific questions regarding reservations.
- Administrative access to contractor-collected data for the operating agency for the purposes of performance monitoring. A preliminary list of data that is thought to be needed is in Section 7.1 of the Concept of Operations.

The reservation system should also have the following additional capabilities:

- Distinguish different user groups and provide a distinct registration and verification system for Crooked Street residents and guests of Crooked Street residents.
- Allow for discounts and promotions.
- Prevent fraud and abuse of the system by, among other items:
  - providing distinct reservation codes to prevent improper copying, duplication, or counterfeiting of reservations.
  - limiting one person or entity from purchasing a bulk number of reservations.

- Release reservation slots in a tiered fashion in the leadup to any given day to ensure reservations are available for tourists who plan a visit to the Crooked Street further ahead of their trip as well as those that do not (for example: 75% of reservations released one month prior, 20% of reservations released one week prior, and 5% of reservations released day-of).
- Easily adjust configurable parameters of pricing, reservations and hours of operations as described in Chapter 7 of the Concept of Operations.

Please refer to Chapter 6 of the Concept of Operations for more detail about these desired system elements.

### ***On-site Personnel***

The Contractor is assumed to be able to employ reservation staff to administer the on-site operations of the system (primarily verifying visitor reservations, providing information to visitors without reservations, and collecting data). The Transportation Authority has identified a minimum of two reservation staff needed on-site to fulfill these duties during operational hours (see Figure 2 in Attachment 1).

Currently, and in the proposed system, only Crooked Street residents are allowed to make right turns from northbound Hyde onto the Crooked Street. Contractor staff are not to direct traffic and will not verify resident passes of vehicles turning right onto the Crooked Street. Those duties will be performed by San Francisco Municipal Transportation Agency (SFMTA) Parking Control Officers (PCOs) also shown in Figure 2. A San Francisco Police Department officer will issue any violations to motorists who disobey PCOs' directions or signage that state that reservations are required. Community ambassadors, hired under contract by the Office of Economic and Workforce Development, are also present at the Crooked Street and focus on cleaning the street and promoting the safety and hospitality of the area for tourists. Note that PCOs, Police Department staff, and existing on-site community ambassadors will not be the Contractor's responsibility but will be part of the overall site and reservations system operations.

### ***Customer Service Personnel***

The Contractor is assumed to be able to employ staff during operational hours to arrange reservations over the phone and respond to customer service inquiries. Given the number of international visitors to the Crooked Street, it is expected that online or telephone customer service should be available in multiple languages.

### ***Marketing***

The Contractor is expected to conduct marketing of the new paid reservation system to potential visitors, which will entail partnering with the San Francisco travel and tourism industry, other public agencies, as well as general advertising across various media.

### ***Insurance***

The Contractor is assumed to obtain and maintain liability insurance, at its own cost and expense, during the term of a contract. The minimum level and types of coverage will be specified in the RFP.

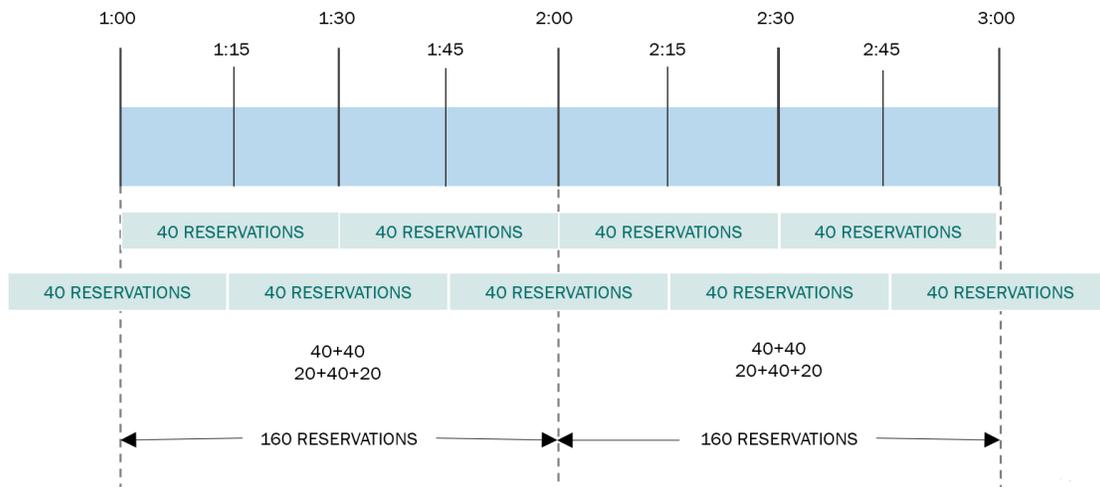
#### IV.E HOURS OF OPERATION

It is anticipated that the hours of operation for the on-street personnel of the paid reservation system will be seven days a week with up to 12 hours (9:00 a.m. to 9:00 p.m.) at peak seasons. The primary peak season is mid-May to early October (e.g. Mother’s Day to San Francisco Fleet Week) with additional peak dates during Thanksgiving, Christmas and New Year’s weekends. The operating agency may decide to adjust hours of operation depending on seasonal demand for reservations, weather or other factors.

#### IV.F. CAPACITY AND RESERVATION SLOTS

The Transportation Authority found that the Crooked Street has capacity to process about 200 automobiles per hour.

The Transportation Authority recommends starting the program with 40 reservation slots per half hour with staggered starts every 15 minutes. This results in approximately 160 slots per hour allowing leftover capacity to accommodate late and early arrival of visitors with reservations as well as Crooked Street residents and their guests. It is expected that reservation distribution and timing can be adjusted when the system is in operation to improve overall performance.



**Figure 3. Illustration of Proposed Reservation Distribution**

#### IV.G RESERVATION FEE

For the 2019 Study, the Transportation Authority conducted feasibility analyses for a range of fees per automobile and recommended starting with \$5 on weekdays and \$10 on weekends and holidays. As with the number of reservation slots, the operating agency may decide to adjust fees periodically during operations.

#### **IV.H CUSTOMERS**

The customers of the paid reservation system will be visitors of the Crooked Street seeking to drive down the 1000 block in a licensed vehicle.

The following groups are not considered customers and will not require a reservation for the Crooked Street: bicyclists, pedestrians, and people arriving on Segways, electric scooters, and any mobility device not required to have a license plate.

#### **IV.I EXEMPT VEHICLES/RESTRICTED VEHICLES/DISCOUNTS**

Pages 13 and 14 of the 2019 Study describe how different groups are expected to interact with the system during operations. The 2019 Study and Concept of Operations recommend that residents of the Crooked Street and Montclair Terrace receive passes that may be a wallet card, rearview mirror hanger, or similar identification. As with current regulations, this pass will allow residents to access the Crooked Street by making a right turn from northbound Hyde, bypassing the paid reservation system altogether. Emergency vehicles, vehicles performing service for public utilities, and other government/service vehicles will be allowed unrestricted access to the Crooked Street at all times.

Commercial vehicles are currently restricted from the Crooked Street at all times. This restriction would continue, and vehicles would need to park nearby and complete their final delivery on foot. Vehicles with capacity over eight passengers are also currently prohibited on the Crooked Street and surrounding blocks.

The Transportation Authority has evaluated options to ensure that the Crooked Street remains accessible to the greatest number of visitors possible without overwhelming the surrounding streets and neighborhood. The 2019 Study recommends setting aside a limited number of slots per time period for visitors requiring ADA access. People reserving these slots would still pay the standard reservation cost but these slots would ensure that visitors who may be unable to navigate the street grade and steps on foot may still visit. The 2019 Study also recommends offering a limited number of free reservations via the San Francisco Public Library's "Discover & Go" program to allow for affordable automobile access to members in the community. The Contractor's reservation database will need to be compatible with offering reservations through the Public Library program. The Contractor is expected to incorporate this capability into the front-end user interface and back-end database of the Technology Systems in Section IV.D.

#### **IV.J ENFORCEMENT/VIOLATIONS**

If a visitor without a reservation chooses to disobey the signage, staff, or PCOs and drive down the Crooked Street, this would constitute a violation of existing traffic laws and the visitor could then be issued a ticket on-site by appropriate enforcement officers from the San Francisco Police Department.

#### **IV.K PROCUREMENT/CONTRACTING ALTERNATIVES**

The state legislation provides authorization for a seven-year pilot program that begins with the first day of system operations. Various procurement/contracting structures are being

considered for the operating agency to procure a Contractor for the paid reservation system, with a contract term up to, but not to exceed, seven years. Currently these alternatives include a reimbursement-based agreement or a concessionaire agreement, or a combination of both. A preferred procurement/contracting structure will be determined following the informational meetings discussed in Section VII and will be described in the RFP.

#### IV.L PROJECT RESOURCES

Links to publicly available project documents and resources are provided below:

- Project Background: <https://www.sfcta.org/projects/lombard-crooked-street>
- 2017 Study: [https://www.sfcta.org/sites/default/files/2019-03/Lombard\\_final\\_report\\_020918.pdf](https://www.sfcta.org/sites/default/files/2019-03/Lombard_final_report_020918.pdf)
- 2019 Study: <https://www.sfcta.org/sites/default/files/2019-06/Lombard%20Summary%20Report%20190621.pdf>
- Technical memoranda from 2019 Study
  - Data Collection Summary: <https://www.sfcta.org/sites/default/files/2019-06/2019-01-10%20Lombard%20Crooked%20Street%20Data%20Collection%20Summary.pdf>
  - Concept of Operations: <https://www.sfcta.org/sites/default/files/2019-06/2019-06-21%20Lombard%20Paid%20Reservations%20System%20Draft%20Concept%20of%20Operations.pdf>

#### IV.M PROJECT SCHEDULE

ANTICIPATED DATE *	MILESTONE
October 2019	Approval of State Legislation (AB 1605)
November 2019	Approval of BOS Ordinance
Fall 2019	Release of RFP
Winter 2020	Board Approval of Contract
Spring 2020	Reservation System Live

*\*Subject to change*

#### SECTION V - QUESTIONS FOR INDUSTRY

The following is a general list of questions that the Transportation Authority is seeking input from the industry. One of the primary goals of the RFI is to weigh the considerations associated with the delivery approach in terms of the type of contract awarded through the RFP.

1. Does your company have experience implementing or operating a similar program? If yes, please describe the program, staffing levels, order of magnitude of start-up

and ongoing costs, the number of annual reservation transactions, and the company's experience.

2. Would you recommend starting with an initial testing phase prior to full operations during the summer peak season and if so, how long and with what design?
3. As discussed in Section IV.K, various procurement/contracting structures are being considered for the RFP. Does your company have a preference for a specific contracting/procurement structure or length of contract? If so, why?
4. How much time would you need to develop, launch and market a reservation system for the Crooked Street? Given the anticipated approval of a contract in early 2020, what are the opportunities and challenges associated with launching the system by spring 2020?
5. Also mentioned in Section IV.D is a requirement for the Contractor to provide on-site personnel to verify reservations. Does your company currently employ staff that conduct on-site operations for a similar project or program? If yes, please describe. If not, would your company be able to hire staff to perform such functions and what lead time would be necessary to retain staff?
6. Do you have innovative ideas for improving the proposed design, structure, marketing or operation of the paid reservation system?

## **SECTION VI - RFI RESPONSE REQUIREMENTS: CONTENT AND FORMAT**

All responses should be clear, concise, and provide sufficient information to minimize questions and assumptions. Responses should be limited to **6 pages** (no smaller than 12-point font shall be used), excluding cover letter, table of contents, and any additional information for consideration, which should be included as attachments, such as brochures or marketing materials. The Transportation Authority accepts no financial responsibility for any costs incurred in the preparation of responses. Upon receipt by the Transportation Authority, all accepted responses submitted for this RFI will become the property of the Transportation Authority.

***Time and Place for Submission of Responses.*** By the submission deadline, the following must be transmitted: one (1) electronic copy (PDF) including all information herein requested. Please clearly specify in the subject line of the e-mail transmittal: "Response to RFI 19/20-02 for Lombard Reservation System Project".

The responses must be transmitted electronically to the Transportation Authority at the following address: [info@sfcta.org](mailto:info@sfcta.org).

All responses must be in writing and identified as to content and be received by the Transportation Authority by the due date. Responses received later than the above date and time will be rejected.

**Cover Letter.** Companies must submit a letter of introduction for the response. The cover letter should include the following:

- Name of company
- Primary contact information (phone, email, etc.)
- Brief company information

**Content.** The up to 6-page responses should focus on the information requested in Section V. The Transportation Authority is not requesting proposals at this time.

Companies must clearly designate financial submittals or other materials in its submittal, if any, which it in good faith believes to be a trade secret or confidential proprietary information protected from disclosure. See Section VIII below, for further details on public disclosure of responses and other materials.

## **SECTION VII - INFORMATIONAL MEETINGS WITH COMPANIES**

The Transportation Authority intends to hold individual informational meetings with each of the companies that submit a response per the content requested in Section V. Note that the responses will not be formally scored or evaluated. The informational meetings are intended to be informal and will be held either in-person or by phone. Information shared during the meetings may be used to inform development of the reservation implementation and operation. Any materials submitted to the Transportation Authority as part of the RFI process, including materials provided at the informational meetings, are subject to public disclosure under the California Public Records Act per Section VIII, unless such materials are otherwise exempt from disclosure.

## **SECTION VIII - NOTE REGARDING PUBLIC DISCLOSURE OF RESPONSES AND OTHER MATERIALS**

Under the California Public Records Act (PRA; Government Code sections 6250 *et seq.*), records, information and materials submitted to the Transportation Authority, not otherwise exempt, are subject to public disclosure. Immediately after the response deadline, the materials submitted by all companies will be open to inspection. Each party submitting a response to the RFI should clearly designate financial submittals or other materials, if any, which it in good faith believes to be corporate proprietary information, including trade secrets, protected from disclosure; if no materials are designated, the submitted response in its entirety may be subject to PRA. To the extent permitted by law, the Transportation Authority will attempt to maintain the confidentiality of such information by providing the company with notice that it has received a request. If the company desires that such materials not be disclosed, it may, at its own expense, take appropriate legal action to prevent such disclosure. However, such confidentiality cannot be assured, the Transportation Authority will not be liable for the public disclosure of any material submitted to it.

### **ATTACHMENTS:**

1. Traffic Flow and Staff Locations in the Recommended Scenario

Attachment 1 - Figure 2. Traffic Flow and Staff Locations in the Recommended Scenario

