



Memorandum

AGENDA ITEM 10

DATE: May 22, 2020

TO: Transportation Authority Board

FROM: Rachel Hiatt, Assistant Deputy Director for Planning

SUBJECT: 6/9/20 Board Meeting: Increase the Amount of the Professional Services Contract with Nelson\Nygaard Consulting Associates by 775,000, to a Total Amount Not to Exceed \$1,475,000, and Extend the Contract Term Through March 31, 2021, for Technical and Communications Services for the Downtown Congestion Pricing Study

RECOMMENDATION Information Action

- Increase the amount of the professional services contract with Nelson\Nygaard Consulting Associates by \$775,000, to a total amount not to exceed \$1,475,000, and extend the contract term through March 31, 2021, for technical and communications services for the Downtown Congestion Pricing Study
- Authorize the Executive Director to modify contract payment terms and non-material terms and conditions

SUMMARY

We have an existing contract with Nelson\Nygaard Consulting Associates for technical and communications services for the Downtown Congestion Pricing Study, which is developing a congestion pricing proposal for San Francisco through a substantial community outreach process supported by technical analysis. We are seeking to increase the amount and scope of the contract to include additional community outreach and a three-month timeline extension of the project end date from December 2020 to March 2021 in response to stakeholder input, and to add items excluded from the original contract pending identification of additional funding. The recommended amendment is contingent upon execution of a Memorandum of Agreement (MOA) with the Office of Public Finance for Transbay Transit Center Community Facilities District Community Facilities District funds that have been programmed to the study. At the May 27 CAC meeting, we will provide a brief update on study progress.

- Fund Allocation
- Fund Programming
- Policy/Legislation
- Plan/Study
- Capital Project Oversight/Delivery
- Budget/Finance
- Contract/Agreement
- Other:



BACKGROUND

In its February 2019 meeting, the Board approved Resolution 19-40 appropriating \$500,000 in Prop K sales tax funds to begin the Downtown Congestion Pricing Study, which had a total initial budget of \$1.8 million. This initial study budget included an anticipated \$400,000 in funds from the Bay Area Toll Authority and an anticipated \$1 million in developer fees from the Transbay Transit Center district. The full study budget was not yet committed at the time of original contract award, so the consultant contract was limited to \$700,000 and contingent upon the remaining funding commitments.

The Study's objectives are to:

- Understand the objectives and key issues of diverse stakeholders regarding a potential congestion pricing program. Ensure community and stakeholder involvement to identify program goals, develop and refine a proposed congestion pricing program, and build agreement around a recommendation.
- Recommend a preferred congestion pricing program within the downtown area that would best meet identified program goals.
- Develop a strategy to advance the recommended congestion pricing program for approvals and implementation.

We enlisted consultant support to assist with the study's substantial stakeholder and public engagement needs, supporting technical analysis, and development of a recommended congestion pricing program. In June 2019, through Resolution 19-65, we awarded an 18-month professional services contract in the amount of \$700,000 to Nelson\Nygaard Consulting Associates for technical and communications services. The initial contract excluded three items planned to be included in later phases of the study scope, when additional funding was secured: expanded translations, the implementation plan, and the final report.

DISCUSSION

Since award of the initial contract, our stakeholder engagement work has included an initial listening round of outreach and convening several meetings each of a Technical Advisory Committee (TAC) of partner agency representatives and a 35-member Policy Advisory Committee (PAC) of key external stakeholders representing northeast quadrant neighborhoods; Communities of Concern citywide; the business and entertainment sector; and transportation and environment interests. Technical work on the study has included an existing conditions analysis, development of study goals and evaluation metrics that were adopted by the PAC, and a screening analysis of a range of potential program options that is now underway.

Input from the PAC, TAC, and listening sessions has resulted in several additions to the study scope, including:

- Additional PAC meetings and supporting technical resources;
- More workshops to co-develop policy proposals with partners in Communities of Concern;



- Further outreach with regional stakeholders; and
- A three-month study timeline extension to allow for the expanded stakeholder engagement plan.

We are seeking to modify the consultant scope to assist with these expanded efforts and final report tasks excluded from the original contract. We are seeking to increase the contract amount by \$775,000 for this added consultant support and extend the contract term to March 31, 2021.

The DBE goal for this contract is 14% and Nelson\Nygaard Consulting Associates has achieved 21% DBE participation to date from three subconsultants: Reflex Design Collective, an African-American and Woman-owned firm; and Silicon Transportation Consultants, an Asian Pacific-owned firm. Nelson\Nygaard is on track to achieve the DBE goal for this contract.

FINANCIAL IMPACT

The total study budget is now planned to be \$2.9 million, comprised of \$900,000 in Prop K and Bay Area Toll Authority *funds as described above, and \$1.35 million in city funds (\$470,000 in developer fees from the Transbay Transit Center district which are secured and \$880,000 in Transbay Transit Center Community Facilities District funds which is pending an executed MOA with the Office of Public Finance)*. We also anticipate requesting \$500,000 in Prop K funds and seeking external grants in the amount of \$150,000.

As noted above, this contract amendment is contingent upon execution of an MOA with the Office of Public Finance for the Community Facilities District funds. Expenditure of the increased contract amount is planned to occur in Fiscal Year 2020/21. Sufficient funds will be included in the proposed Fiscal Year 2020/21 budget to accommodate the recommended action.

CAC POSITION

The CAC will consider this item at its May 27, 2020 meeting.

SUPPLEMENTAL MATERIALS

- Attachment 1 - Original Contract Scope of Services
- Attachment 2 - Proposed Additional Scope of Services

Attachment 1

Scope of Services

The Transportation Authority seeks technical and communications consultant services to support the Downtown Congestion Pricing Study (Project). The scope of work for this Project presents four separate but interrelated workstreams:

- Workstream 0: Project Management
- Workstream 1: Stakeholder Engagement
- Workstream 2: Program Development
- Workstream 3: Technical Analysis

The scope of work consists of the following tasks:

- Workstream 0: Project Management
 - Task 0.1: Kick-off meeting and workplan
 - Task 0.2: Ongoing project management
 - Task 0.3: Final report
- Workstream 1: Stakeholder Engagement
 - Task 1.1: Stakeholder and Community Engagement Plan
 - Task 1.2: Message Development
 - Task 1.3: Policy Advisory Committee
 - Task 1.4: Engagement Activities and Materials
- Workstream 2: Program Development
 - Task 2.1: Program Development Plan
 - Task 2.2: Technical Advisory Committee
 - Task 2.3: Goals and Objectives, Purpose and Need
 - Task 2.4: Research and Document Case Studies
 - Task 2.5: Develop and Refine Program Definition, Identify Recommended Program
 - Task 2.6: Implementation Plan
- Workstream 3: Technical Analysis
 - Task 3.1: Technical Analysis Plan
 - Task 3.2: Existing Conditions Data Gathering and Analysis
 - Task 3.3: Additional Analysis for Program Development and Stakeholder Engagement
 - Task 3.4: Cost and Revenue Estimates

The scope for each task and associated deliverables is as follows.

Workstream 0: Project Management

Task 0.1: Kick-off meeting and workplan

The project kick-off meeting will include the Contractor for each of the workstreams. It will focus on how the workstreams will interrelate and how the teams will coordinate the scopes and schedules for each. The purpose of this meeting will be to outline a combined workplan for all workstreams. The Contractor for the Program Development workstream will finalize the overall project workplan, incorporating content provided by the Contractor for the other workstreams.

The workplan should provide for the study scope of work to be completed in 18 months or less (by mid- to late 2020).

Task 0.2: Ongoing project management

Attachment 1

Scope of Services

The Transportation Authority will have a project manager to coordinate the overall project effort. If different consultants are selected for individual workstreams, the Transportation Authority project manager will lead study team coordination between those workstreams. Each Contractor will be expected to lead internal team coordination within and among the workstream(s) it is managing. Each Contractor will participate in regular bi-weekly project team meetings and submit monthly progress reports.

Task 0.3: Final report

The study final report will synthesize and document the study process, conclusions, and recommendations. The Contractor for the Program Development workstream will prepare the final report, incorporating content provided by the Contractor for the other workstreams. Transportation Authority staff and resources will be used for final report layout and printing.

Workstream 0 Deliverables:

<i>Task</i>	<i>Deliverable</i>
<i>0.1</i>	<ul style="list-style-type: none">• <i>Draft and final workplan</i>• <i>Attendance at project kick-off meeting</i>
<i>0.2</i>	<ul style="list-style-type: none">• <i>Attendance at bi-weekly project team meetings</i>• <i>Monthly invoices and brief progress reports</i>
<i>0.3</i>	<ul style="list-style-type: none">• <i>Draft and final study report</i>

Workstream 1: Stakeholder engagement

Task 1.1: Stakeholder and Community Engagement Plan

The Contractor will produce a plan for how the project team will engage key stakeholders and the public in development of a congestion pricing program and build agreement around a recommended program. Key stakeholders must be closely engaged as the Program Development workstream progresses, requiring coordination between planning and execution of the two workstreams. The plan will identify key stakeholders, which will include:

- The Policy Advisory Committee (PAC), to be convened in Task 1.4;
- The Technical Advisory Committee (TAC), to be convened in the Program Development workstream;
- Public officials who will have key decision-making roles, and their staffs; and
- Other stakeholders at the local, regional, or state level that have important interests in the study, with a focus on involving Communities of Concern and other vulnerable groups.

The plan should also describe how broader public involvement, both local and regional, will inform the Program Development workstream and engage communities in discussions and education about congestion pricing.

The plan will also be closely coordinated with the Technical Analysis workstream to identify how technical analysis might support the engagement process and address key stakeholder issues.

The engagement plan will identify:

- A timeline of stakeholder engagement and public outreach activities;

Attachment 1

Scope of Services

- Key messages, audiences, and input to be sought during each set of activities;
- How to engage the PAC over a planned series of meetings;
- Methods to reach and gather input from other key stakeholders and the broader public, with a focus on methods to involve Communities of Concern and other vulnerable groups;
- Opportunities to engage key decision-makers and their staffs in the program development, outreach, and education processes;
- How and when to engage the media; and
- Roles for Transportation Authority and consultant staff and any others who should be involved.

Task 1.2: Message Development

The Contractor will undertake needed background research and information-gathering and produce a strategy for the overall public message of the study, including how the project team communicates about the general topic of congestion pricing, this particular study, and a recommended congestion pricing program. Information-gathering could include, for example, case studies of other communications strategies, polling, surveys, and/or focus groups. Message development must be integrated with the Program Development workstream to ensure that messages are consistent with the programs under development and with the Technical Analysis workstream to identify any key data points that would support key messages. The Contractor will document the information gathered and key messaging recommendations.

Task 1.3: Policy Advisory Committee

The Project will have a PAC comprised of a diverse set of key stakeholder representatives to advise and provide input to the project team regularly throughout the study process. The PAC will play an important role in shaping the Program Development workstream and identifying key questions for the Technical Analysis workstream to help address. The Contractor will use its knowledge and familiarity with San Francisco stakeholders and its knowledge of congestion pricing stakeholder engagement in other cities to assist with convening the PAC, including the following:

- Review and advise on a draft list of PAC participants;
- Plan meetings and develop agendas; and
- Support staff at meetings and develop outreach-related content as needed.

The Contractor will also provide any Stakeholder Engagement-related content as needed to support the TAC, which is convened as part of the Program Development workstream.

Task 1.4: Engagement Activities and Materials

The Contractor will coordinate and implement stakeholder and community engagement activities per the Stakeholder and Community Engagement Plan, including producing supporting collateral materials. Activities could include:

- Listening sessions and meetings with stakeholder groups;
- Public events such as open houses, town halls, workshops, tabling, etc.;
- Surveys and polls;
- Online and social media engagement tools; and
- Multilingual engagement both in-person and online.

Attachment 1

Scope of Services

Transportation Authority communications staff will work with the Contractor on outreach content development. The Contractor will execute outreach activities and logistics (e.g. arranging meetings and venues, producing materials, translations, etc.) and augment staff at events.

Workstream 1 Deliverables:

<i>Task</i>	<i>Deliverable</i>
<i>1.1</i>	<i>Draft and final Stakeholder and Community Engagement Plan</i>
<i>1.2</i>	<i>Draft and final Message Development Memo</i>
<i>1.3</i>	<i>Draft and final PAC meeting agendas</i>
<i>1.4</i>	<i>Outreach materials and activities per the Stakeholder and Community Engagement Plan</i>

Workstream 2: Program Development

Task 2.1: Program Development Plan

The Contractor will identify the proposed process for developing and refining potential congestion pricing concepts into a set of recommendations and implementation plan with stakeholder support. To arrive at a recommended congestion pricing program, the study will need to both a) consider and narrow down a range of program possibilities and b) incorporate new input and information to iterate and refine the potential program definition(s). Both (a) and (b) will require stakeholder engagement and technical input.

In coordination with the Stakeholder Engagement workstream, the plan will identify how engagement with the PAC, TAC, decision-makers, and the general public will help develop the proposed program and shape the deliverables. It should identify how the process will address key stakeholder concerns regarding congestion pricing, including:

- Equity: Whether the program would benefit low-income travelers and other vulnerable populations;
- Economy: How it would affect small and large businesses; and
- Effectiveness: Whether the system will work effectively to reduce congestion without causing negative effects like additional transit crowding or worsened congestion outside a pricing zone.

In coordination with the Technical Analysis workstream, the plan will identify questions that require technical input and discuss how technical input and analysis will be incorporated to support the program development process.

The plan will also identify appropriate roles for Transportation Authority and consultant staff.

Task 2.2: Technical Advisory Committee

The Transportation Authority will convene a TAC comprised of staff from local and regional partner agencies to advise and provide input to the project team regularly (approximately every other month) throughout the study process. The TAC will play a particularly important role in providing input on the feasibility of potential concepts in the Program Development workstream and helping to guide the Technical Analysis workstream. The Contractor will assist with convening the TAC as follows:

- Plan meetings and develop agendas; and

Attachment 1

Scope of Services

- Support Transportation Authority staff at meetings and provide Program Development-related content as needed.

The Contractor will also provide any Program Development-related content as needed to support the PAC, which is convened as part of the Stakeholder Engagement workstream.

Task 2.3: Goals and Objectives, Purpose and Need

With appropriate input from Transportation Authority staff, the PAC, TAC, and other key stakeholders as specified in the Program Development Plan, the Contractor will define the goals of the congestion pricing scenarios and specific objectives under each goal area. Next, per the Program Development Plan and using data on existing and expected future conditions provided as part of the Technical Analysis workstream, the Contractor will define the purpose and document the need for a congestion pricing program in and around downtown San Francisco. The Contractor will document the goals and objectives as well as the purpose and need in a single memo.

Task 2.4: Research and Document Case Studies

In consultation with the project team, the Contractor will use its experience with congestion and mobility pricing to identify relevant case studies and assist Transportation Authority staff in liaising with other cities' congestion or mobility pricing program planning and implementation efforts. The Contractor will share and concisely document the experience of other cities with respect to key issues, such as those identified in Task 2.1; other cities' degree of success in addressing them; and what insights and lessons learned may be applicable to any of the workstreams in this study.

Task 2.5: Develop and Refine Program Definition, Identify Recommended Program

The Contractor will develop and refine potential congestion pricing concept(s) per the Program Development Plan to identify a recommended congestion pricing program. Elements of the program definition should include the following:

- Congestion charging parameters, such as the type of charge (e.g. cordon, area, road user, etc.), fee amounts, days and hours they would be in effect, types of vehicles to be charged, and geographic limits of a charging zone;
- Discounts, subsidies, incentives, and travel demand management tools/programs to reduce the burden of pricing on vulnerable populations and encourage the use of sustainable travel modes;
- A package of local and regional multimodal improvements to be funded with program revenues, such as transit service increases, street repaving, streetscape improvements, and upgrades to transit, walking, and bicycling infrastructure; and
- Options for technology solutions that could be used to implement the program.

Finally, per the Program Development Plan, the Contractor will identify a recommended congestion pricing program with appropriate documentation of the rationale for its selection. The Contractor will incorporate operating cost and revenue estimates developed in Workstream 3, Task 3.4. The recommended program documentation should be sufficient to support presentation of the recommendation to key decision-makers and the public.

Transportation Authority and SFMTA planning staffs will be available to assist with developing program elements (including development of multimodal investment packages), identifying potential funding sources, and related interagency coordination.

Attachment 1

Scope of Services

Task 2.6: Implementation Plan

The Contractor will prepare an implementation plan that identifies appropriate next steps and roles to secure the needed approvals and implement the recommended alternative. The plan will include a proposed timeline and level of effort needed (e.g. level of environmental review, required state legislation). The plan will incorporate an estimate of costs developed in Task 3.4 for each implementation phase and will identify potential funding sources for each phase. This plan should also include identification of any potential near-term pilot opportunities and/or other opportunities to shorten the timeline to program implementation.

Workstream 2 Deliverables:

<i>Task</i>	<i>Deliverable</i>
<i>2.1</i>	<i>Draft and final Program Development Plan</i>
<i>2.2</i>	<i>Draft and final TAC meeting agendas</i>
<i>2.3</i>	<i>Draft and final Goals & Objectives and Purpose & Need Memo</i>
<i>2.4</i>	<i>Draft and final Case Studies Memo</i>
<i>2.5</i>	<i>Draft and final Recommended Program Memo</i>
<i>2.6</i>	<i>Draft and final Implementation Plan</i>

Workstream 3: Technical Analysis

Task 3.1: Technical Analysis Plan

The plan will develop and document the proposed process and methods for performing technical analysis as needed to support the Program Development and Stakeholder Engagement workstreams. The Contractor will develop the plan in close coordination with the other workstreams to identify the analysis support that will be needed, such as for program development, understanding trade-offs between program options, stakeholder engagement, and implementation planning. The plan should identify known analysis needs and timelines to support the other workstreams, as well as criteria for determining whether additional analysis is required as questions arise during the study. The Transportation Authority has a travel demand model, SF-CHAMP, with the capability to model congestion pricing. However, the plan should identify the most appropriate analysis tools to efficiently and effectively address the needs known or likely to arise in the Program Development and Stakeholder Engagement workstreams and whether and when to use each tool. Lastly, the plan will also identify the roles of consultant and Transportation Authority staff.

Task 3.2: Existing Conditions Data Gathering and Analysis

The existing conditions analysis will use data and analyses to provide needed background information to support the development of the Purpose and Need documentation in the Program Development workstream. An important component of this analysis will be to consider the socioeconomic equity of the existing transportation system, such as by comparing the trip purposes, modes, travel costs, and reasons for mode selection for peak period downtown travelers by income group. The Contractor will first inventory available sources of synthesized data and identify gaps where additional data collection and/or synthesis is needed. Existing synthesized data is available on traffic congestion, transit speeds, land use and expected growth, pollution, and public health and safety. However, gathering of additional observed data may be needed to complete the equity analysis.

Attachment 1

Scope of Services

Task 3.3: Additional Analysis for Program Development and Stakeholder Engagement

Per the Technical Analysis Plan, the Contractor will conduct and document analysis as needed to support the other workstreams using the most appropriate and efficient methods available. Anticipated questions that may need technical answers include:

- How a proposed program would affect vehicle delay, transit speeds, vehicle miles traveled, and travel time by mode;
- How a proposed program would change different users' total travel costs;
- How a proposed program would affect the environment in terms of greenhouse gas emissions and localized pollution;
- How a proposed program may affect traffic safety; and
- How any effects of a proposed program would be distributed, e.g. between demographic groups, in Communities of Concern, among San Francisco neighborhoods, and locally vs. regionally.

Transportation Authority staff will work with the Contractor on analysis tasks, such as running the SF-CHAMP model if needed. The Transportation Authority's proposed Fiscal Year 2019/20 budget currently includes resources sufficient to run several SF-CHAMP scenarios or to assist at a similar level of effort with alternative analysis methods.

The Contractor will also provide any Technical Analysis-related content as needed to support the PAC, which is convened as part of the Stakeholder Engagement workstream, and the TAC, which is convened as part of the Program Development workstream.

Task 3.4: Cost and Revenue Estimates

In coordination with Task 2.5 of the Program Development workstream, the Contractor will prepare operating cost and revenue estimates for congestion pricing program scenarios. The Program Development workstream will likely need efficiently-provided rough estimates for various scenarios as part of the process of developing and refining potential congestion pricing concepts. The Contractor will then provide a refined operating cost and revenue estimate for the recommended program.

The Contractor will also estimate rough costs for each phase of program implementation in support of implementation plan development in Task 2.6. This includes estimates for program design, procurement, and capital costs for deployment of the recommended congestion pricing program including associated multimodal investments. Transportation Authority staff support is available to assist with estimating costs for agency time and multimodal investments.

Workstream 3 Deliverables:

<i>Task</i>	<i>Deliverable</i>
<i>3.1</i>	<i>Draft and final Technical Analysis Plan</i>
<i>3.2</i>	<i>Draft and final Existing Conditions Analysis Memo</i>
<i>3.3</i>	<i>Technical analysis memos as defined in the Technical Analysis Plan</i>
<i>3.4</i>	<i>Draft and final Cost and Revenue Estimates Memo</i>

DOWNTOWN CONGESTION PRICING STUDY: ADDITIONAL SCOPE OF WORK

The Transportation Authority's Downtown Congestion Pricing Study is now anticipated to last 21 months, beginning in July 2019 and concluding by March 2021. This additional scope of work is in addition to the scope described in Contract 18/19-17. The additional scope includes expanded and extended effort for ongoing tasks, adds tasks included in the original study scope of work but excluded from the original contract, and increases the amount of public outreach anticipated over the duration of the project.

General Assumptions:

- CONTRACTOR includes any member of the Nelson\Nygaard Consulting Associates team.
- The Transportation Authority will provide reasonable and timely review cycles, allowing two review cycles (draft and final) for major internal deliverables and up to three review cycles (draft, revised, and final) for major external deliverables.

Workstream 0: Project Management

Workstream 0 will continue to coordinate the work of the CONTRACTOR team members and ensure seamless communication with the Transportation Authority. This project management workstream includes day-to-day project management, select core team meetings and workshops, as well as production of the final report for the project. It does not include all meeting hours across the workstreams, as those are included in the individual workstream budgets.

Task 0.1: Kickoff Meeting and Workplan

No additional scope or budget is requested.

Task 0.2: Ongoing Project Management

This task includes additional time and budget for day-to-day project management, meetings, and briefings to support delivery of the study. Due to a longer project timeline—extended three (3) months to the end of March 2021—as well as a higher level of coordination required to integrate the workstreams and advance the scope of work, the following assumptions guide the additional budget for Task 0.2:

- Weekly 30 min Workstream 0 meetings (3 ppl)
- Weekly 1 hr Workstream Leads (2 ppl) meetings
- PM attendance at weekly 1 hr Workstream 1 and Workstream 3 meetings (1-2 ppl)
- Weekly 30 min PM check-in meetings (3 ppl)
- Five (5) all-team workshops (roughly half-day + prep time)
- Two (2) additional Board briefings
- Increased hands-on and day-to-day project management, including SmartSheets, SharePoint, and team coordination activities
- Extended project schedule (+3 mos)
- Four (4) additional trips to support the workshops and briefings described above

Deliverables:

- Agendas and notes for weekly meetings

- Project schedule and workback plan updates
- File sharing site and communications protocols
- Monthly invoices and progress reports

Task 0.3: Final Report

The study final report will synthesize and document the study process, conclusions, and recommendations. The CONTRACTOR will prepare the content for the final report, incorporating members of the team as appropriate. The report will be no more than 50 pages in length, reader-friendly, and accessible to a broad audience. The CONTRACTOR will provide select graphics to support the final report, but Transportation Authority staff and resources will be used for final report layout and printing. This task was included in the original study scope of work but excluded from the original contract.

Deliverables:

- Draft and final report outline
- Draft, revised, and final report content
- Draft and final supportive graphics

Workstream 1: Stakeholder Engagement

Workstream 1 shapes and implements the project's messaging, communications, and broad-based engagement tactics. By working directly with community members—including those who would be most impacted by a congestion pricing program—the CONTRACTOR will continue to implement an equity-driven process.

Task 1.1: Stakeholder & Community Engagement Plan and Management

The additional scope and budget in this task addresses the need for increased coordination, management, and strategy development time for Workstream 1 tasks. To fully develop the study, including the additional outreach scope and extended timeline, there is a need for more time to meet and coordinate within and across workstreams and with both CONTRACTOR team members and Transportation Authority staff. This task includes three sub-tasks.

Workstream 1 Meetings, Quarterly Meetings, and Workstream Lead Tasks

Time for additional participation in meetings and task leadership uses the following assumptions to guide the additional scope and budget:

- Participation in weekly 1-hour Workstream Leads calls (1 person)
- Leadership of and participation in weekly Workstream 1 meetings (4 ppl)
- Quarterly all-team meetings (4 ppl)
- Additional coordination with the Transportation Authority
- Project management tasks (team coordination, schedule updates, invoicing)
- CONTRACTOR internal coordination meetings
- Coordination of translation needs and materials
- Extended project schedule (+3 mos)

Deliverables:

- Agendas and notes for weekly Workstream 1 calls
- Monthly invoices and progress reports

Stakeholder Outreach Support

CONTRACTOR will update and finalize stakeholder lists, conduct additional outreach to key stakeholders, schedule and conduct one-on-one interviews, and provide reports to the Transportation Authority.

Deliverables:

- Updated stakeholder lists
- Reports on stakeholder engagement

Regional Strategy Development and Stakeholder Interviews

This subtask will develop a strategy and initiate connections to expand the study's engagement of stakeholders and audiences beyond San Francisco. CONTRACTOR will lead strategy development and initiate connections with regional stakeholders, such as organizations working with Communities of Concern outside San Francisco, but will not participate in stakeholder briefings.

Deliverables:

- Regional engagement strategy

Task 1.2: Message Research and Development

The CONTRACTOR shall refine and adapt messaging that accurately and articulately communicates the Transportation Authority's congestion pricing plans while incorporating questions and concerns from the public. The additional scope and budget reflect the importance of messaging development, the need to involve community-based organizations in message refinement, the anticipated evolution of key messages throughout the life of the project, and planning and executing social media ad campaigns.

The following assumptions guide the additional budget for Task 1.2:

- Additional team member review of key messages
- Review of messaging with an equity lens
- Development of social media ads for 2 rounds of surveys
- Coordination with community-based organizations and compensation for review (direct expense)
- Coordination of translation of refined messages

Deliverables:

- Support for CBO discussions to inform messaging
- Development and purchase of social media ads (2) for surveys

Task 1.3: Policy Advisory Committee (PAC)

As a group of champions, influencers, and project advisors, the PAC will continue to shape the congestion pricing program and guide the Transportation Authority in carrying messages to its audiences and stakeholders. To support deeper PAC engagement in the study, CONTRACTOR will provide support for two (2) additional PAC meetings. Additionally, the level of effort to support PAC meetings is greater than originally anticipated due to the complexity of the project and higher levels of coordination needed.

The following assumptions guide the additional scope and budget for Task 1.3:

- Expands resources to cover additional time associated with preparing, providing facilitation and logistics support, and developing notes for each meeting
- Assumes 8 meetings instead of 6 meetings (2 additional)
- CONTRACTOR will have two (2) staff members at most PAC meetings (one from Civic Edge Consulting and one from Reflex Design Collective)
- The Transportation Authority will prepare primary content (presentations and supporting materials) needed for PAC meetings
- The Transportation Authority will coordinate with PAC members on meeting scheduling, logistics, and other ad-hoc communication needs between meetings
- The Transportation Authority will host and fully staff any “voluntary” PAC meetings

Deliverables:

- Meeting agendas, other materials needed for meeting logistics, and summaries for two (2) additional PAC meetings
- Increased support for currently-planned six (6) PAC meetings

Task 1.4: Engagement Activities & Materials

The CONTRACTOR shall continue to implement a variety of activities to help reach stakeholders where they are, making it convenient, interesting, educational, and fun to help shape this project, and helping people understand the opportunity to engage and how their feedback will be used. The scope and budget requested supports additional outreach to community-based organizations, co-creation workshops, and translation of materials for other activities (e.g. pop-up, intercept, and digital engagement activities).

Outreach to Community-Based Organizations (CBOs)

The CONTRACTOR will develop a program for enhanced engagement with community-based organizations, working with them to determine the best ways to share surveys with their members and conduct broader engagement. This will include developing a plan to engage CBOs, providing recommended edits to survey language, and facilitating translation.

Deliverables:

- Program to engage CBOs, including encouragement to distribute surveys

Co-Creation Workshops

CONTRACTOR will plan and provide logistics support for 11 and facilitate 10 (of the 11) additional multilingual co-creation workshops in partnership with local community-based organizations and/or PAC members to engage key stakeholders with an emphasis on those most affected by the program. Co-creation workshop activities include coordinating participation, invites, notification, venue and logistics; preparation of event and staffing plan; material preparation and review, travel, meeting setup and breakdown, travel to and staffing during meeting, meeting facilitation, tracking of community input, and provision of workshop output synthesis. Equity-centered outreach will intend to reach a variety of populations, recognizing that marginalized communities tend to have separate access needs. Key communities include SoMa, the Tenderloin, Chinatown, Bayview, the Mission, Excelsior, Visitacion Valley, the Western Addition, working class commuters, and the broader San Francisco community.

The following assumptions guide the additional scope and budget for co-creation workshops:

DOWNTOWN CONGESTION PRICING STUDY: ADDITIONAL SCOPE OF WORK (4/21/20)

San Francisco County Transportation Authority

- Assumes 10 additional workshops, with logistics support and direct expenses for 11 additional workshops
- Tasks include planning (content, strategy, partnerships), facilitation, and synthesis of outputs
- Direct expenses including co-designer and CBO co-host compensation, translation, childcare, food, venue, materials

Deliverables:

- 10 co-creation workshops, including all coordination, notifications, materials, and summaries
- 1 co-creation workshop, including only logistics and planning support (Transportation Authority to lead workshop facilitation)

Translation of Project Outreach Materials

This scope and budget support direct costs for translation of materials—beyond in-language translation at co-creation workshops—to support overall project and engagement needs. Materials may include those for pop-up workshops, surveys, briefings, and other communications, as needed.

Assumptions:

- 1 round of translation for final co-creation workshop materials
- 1 round of translation for final pop-up workshop materials
- 2 rounds of translation for social media ads
- 2 rounds of translation for surveys

Workstream 2: Program Development

Additional effort for Workstream 2 focuses on leading the program development process, which combines information from conversations with key stakeholders and the public from Workstream 1 and technical analysis from Workstream 3. The program will build on the goals articulated in the first six months of the study and chart a path toward a more equitable and sustainable future.

Task 2.1: Program Development Plan and Coordination

The additional scope and budget in this task is to support Sam Schwartz Engineering assuming a task leadership role and responsibility for select deliverables. To fully develop the Downtown Congestion Pricing Program, there is a need for more significant time to meet and coordinate within and across workstreams and with both CONTRACTOR team members and Transportation Authority staff. This task is broken into two sub-tasks that separate meetings from development of the Program Development Plan.

Workstream 2 Meetings, Quarterly Meetings, and Workstream Lead Tasks

Time for additional Sam Schwartz Engineering participation in meetings and task leadership uses the following assumptions to guide the additional scope and budget:

- Serve as Workstream 2 lead, coordinating all deliverables within this task
- Lead weekly 30 min workstream meetings (including developing agendas and notes), with up to 2 ppl attending
- Increased level of coordination with the Transportation Authority
- PM tasks (such as additional team coordination and workstream-focused schedule updates)
- Extended project schedule (+3 mos)

Deliverables:

- Agendas and notes for weekly Workstream 2 calls

Program Development Plan Creation and Updates

As described in the original scope of work, CONTRACTOR will document the process for developing congestion pricing programs for screening, analysis and evaluation, and refinement toward a preferred alternative. The additional budget for Task 2.1: Program Development Plan Creation and Updates transfers responsibility for this deliverable to Sam Schwartz Engineering. The budget assumes a single round of development and response to one (1) set of non-conflicting comments.

Deliverables:

- Draft and Final Program Development Plan

Task 2.2: Technical Advisory Committee (TAC)

No additional scope or budget is requested. The Transportation Authority will assume responsibility for all staffing, scheduling, materials preparation, notetaking, and synthesis.

Task 2.3: Goals & Objectives, Purpose & Need

CONTRACTOR, in collaboration with the Transportation Authority, PAC, TAC, and other key stakeholders, will define the goals of the congestion pricing scenarios and identify specific objectives under each goal. The goals and objectives set the tone and direction for all remaining tasks, including purpose and need, scenario development and screening, recommended scenario, and implementation plan.

The additional budget requested shifts hours to Sam Schwartz Engineering to cover the increased level of effort required to complete this task. The following assumptions guide the additional budget for Task 2.3:

- Reflects multiple rounds of review and revision, based on Transportation Authority input, Workstream 0, 1, and 3 input, and PAC and TAC feedback
- Acknowledges shift in the purpose of the document from the first draft, requiring significant additional coordination and re-writes due to changing direction (and “leading edge” of this document)

Deliverables:

- Draft, revised, and final technical memo of goals and objectives, purpose and need

Task 2.4: Support for Case Study Research

No additional scope or budget is requested.

Task 2.5: Develop & Refine Program Definition, Identify Recommended Program

Based on inputs from Workstream 1 and Workstream 3, the CONTRACTOR will develop congestion pricing program scenarios, alternatives, and a recommended program that best meet the goals and objectives identified in Task 2.3. Transportation Authority and SFMTA staffs will assist with developing program elements (including development of multimodal investment packages), identifying potential funding sources, and related interagency coordination. The recommended program documentation will support another round of public engagement as well as presentation of the recommendation to key decision-makers.

The following assumptions guide the additional scope and budget for Task 2.5:

- Reflects anticipated additional level of effort due to extended project schedule, cross-workstream collaboration, multiple rounds of review and revision, and evolving approach to program definition and technical analysis
- Reflects heightened importance of Workstream 2 as key shaper of the policy program
- Provides time for cross-workstream input and revision to shape the program, including additional collaboration with Workstream 1 and Workstream 3 throughout program development

Deliverables:

- Draft and final report documenting recommended scenario

Assumptions:

- Time for all other deliverables in this task is included in the original project budget

Task 2.6: Implementation Plan

CONTRACTOR will develop an implementation plan that speaks directly to the project's goals, objectives, purpose, and need. It will identify a roadmap for the Transportation Authority's next steps and roles to secure the needed approvals and implement the recommended alternative.

The implementation plan will focus in five areas: education and engagement, policy and legislation, environmental review, technology and operations, and coalition building. It will incorporate an estimate of costs developed in Task 3.4 for each implementation phase and will identify potential funding sources for each phase.

The plan will outline the phasing of elements, from establishing a potential pilot program (should that be desired) to standing up a full congestion pricing program. The plan will include a concept of operations, design concepts, functional requirements, and an assessment of how this program will integrate into future mobility services offerings.

The concept of operations will include the following elements:

- **System Definition:** Defines the congestion pricing system/facilities
- **Planning and Policy:** Provides the policies and laws relating to the implementation of congestion pricing
- **Design:** Details the principles of design unique to congestion pricing such as signage and technology
- **Operations:** Outlines the principles of safe and efficient operation of the congestion management system (e.g., toll collection process and systems required for collection; back-office needs, and enforcement)
- **Maintenance:** Outlines the maintenance responsibilities for the congestion pricing system

CONTRACTOR will also identify any potential near-term pilot opportunities and/or other opportunities to shorten the timeline to program implementation.

Deliverables:

- Draft and final Implementation Plan

Workstream 3: Technical Analysis

Workstream 3 provides the technical analysis and verification to support Workstreams 1 and 2. The technical analysis is an iterative process with a number of feedback loops. Most analytical work will be led by the Transportation Authority, with guidance on the approach, assumptions and inputs, findings, and next steps provided by the CONTRACTOR.

Task 3.1: Technical Analysis Plan and Coordination

The additional scope and budget in this task is to support increased workstream coordination and management as well as the extended study timeline. To fully develop the study, there is a need for more time to meet and coordinate within and across workstreams and with both CONTRACTOR team members and Transportation Authority staff. Time for additional CONTRACTOR participation in meetings and task leadership uses the following assumptions to guide the additional scope and budget:

- Serve as Workstream 3 lead, coordinating expanded technical team
- Lead weekly 30 min workstream meetings (including developing agendas and notes), with up to 4 ppl attending
- Increased level of coordination with the Transportation Authority
- PM tasks (such as additional team coordination and workstream-focused schedule updates)
- Extended project schedule (+3 mos)

Deliverables:

- Agendas and notes for weekly Workstream 3 calls

Task 3.2 Existing Conditions Data Gathering & Analysis

CONTRACTOR shall work with the Transportation Authority on additional existing conditions analysis and documentation to help inform Workstreams 1 and 2.

The following assumptions guide the additional budget for Task 3.2:

- Provides resources for third round of Existing Conditions Report development following input from the Transportation Authority and PAC, including new data analysis and reorganization of the document
- Supports creation of additional materials and content to support PAC, TAC, co-creation, key messages, and Goals and Objectives memo (content is similar but needs to be tailored)
- The Transportation Authority will aid in preparing and gathering data

Deliverables:

- Materials to support other workstreams, including PAC/TAC presentations and co-creation workshops
- Revised Draft and Final Existing Conditions Analysis Memo, including maps and graphics

Task 3.3: Analysis for Program Development & Stakeholder Engagement

The CONTRACTOR will continue to work with the Transportation Authority to advance program analysis per the Technical Analysis Plan, including additional analysis coordination with workstreams 1 and 2 over the expanded study timeline.

The following assumptions guide the additional budget for Task 3.3:

- Provides 4 hrs per month (over 10 months) to support greater oversight, cross-workstream coordination and collaboration, and review
- All modeling runs led by the Transportation Authority

Deliverables:

- Greater participation (3 ppl) in alternatives analysis workshops
- Additional time for review and analysis of output for alternatives analysis

Task 3.4: Cost & Revenue Estimates

As part of the analysis process, CONTRACTOR will continue to generate capital costs and operating and maintenance costs to allow performance of financial analysis and to check against financial screening and performance criteria. The following assumptions guide the additional budget for Task 3.4:

- Increases level of effort from 6 total hours to ensure PM and Workstream 3 lead are integrated into estimate development and review, particularly related to Board and public presentation (and anticipated focus on reinvestment opportunities)
- Costs will generally be the same for major alternative concepts, with little or no change expected for minor operating characteristics, fee amount, or similar changes

Deliverables:

- Greater participation (3 ppl) in development and review of estimates
- Additional time for shaping technical information into public-friendly materials