



Memorandum

AGENDA ITEM 9

DATE: November 25, 2020
TO: Transportation Authority Board
FROM: Rachel Hiatt - Assistant Deputy Director for Planning
SUBJECT: 12/08/2020 Board Meeting: Appropriate \$550,000 in Prop K Funds, with Conditions, for the Downtown San Francisco Congestion Pricing Study

<p>RECOMMENDATION <input type="checkbox"/> Information <input checked="" type="checkbox"/> Action</p> <p>Appropriate \$550,000 in Prop K funds, with conditions, for the Downtown Congestion Pricing Study (\$550,000)</p> <p>SUMMARY</p> <p>In December 2018, the Transportation Authority Board directed staff to study congestion pricing alternatives for San Francisco and in February 2019, appropriated \$500,000 to the Downtown Congestion Pricing Study (Study). Study is developing a congestion pricing proposal for San Francisco through a substantial community outreach process supported by technical analysis. In June 2020, the Board approved a contract amendment with Nelson Nygaard Consulting Associates to expand the project scope to include additional community outreach and a three-month extension of the project schedule through Spring 2021. The requested \$550,000 in Prop K funds would support additional community outreach and the three-month extension of the project schedule. Attachment 1 includes a summary of the request. Attachment 2 provides a brief description of the scope for the additional funds. Attachment 3 contains the staff recommendations. The Study scope and schedule extension is also supported by \$350,000 in Transbay Transit Center Community Facilities District Community Facilities District funds. At the December 8 Board meeting, we will provide an update on study outreach and technical findings so far.</p>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Fund Allocation <input checked="" type="checkbox"/> Fund Programming <input type="checkbox"/> Policy/Legislation <input type="checkbox"/> Plan/Study <input type="checkbox"/> Capital Project Oversight/Delivery <input type="checkbox"/> Budget/Finance <input type="checkbox"/> Contract/Agreement <input type="checkbox"/> Other: _____
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BACKGROUND

In December 2018, the Transportation Authority Board directed staff to study congestion pricing alternatives for San Francisco, including alternative packages of congestion charges, discounts, subsidies, incentives, and multi modal transportation improvements. 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 (Study), which had a total initial budget of \$1.8 million. This initial study budget included \$400,000 in funds from the Bay Area



Toll Authority and up to \$1.0 million in developer fees from the Transbay Transit Center district. At the time, we anticipated the need for more budget to complete the study but wished to start with funds in hand while we continued to secure the additional \$1.0 million in needed funds.

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.

The Study's stakeholder engagement includes 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. Early input from the PAC shaped the expanded 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.

In its June 2020 meeting, the Board approved Resolution 20-63, increasing the amount of the professional services contract with Nelson\Nygaard Consulting Associates by \$775,000, to a total amount not to exceed \$1,450,000, and extending the Contract Term through March 31, 2021, for technical and communications services for the Study. These activities were part of the expanded study scope and budget, which was increased to \$2.9 million, comprised of \$900,000 in Prop K and Bay Area Toll Authority funds as described above, and a new total of \$1.35 million in city funds (\$470,000 in developer fees from the Transbay Transit Center district and \$880,000 in Transbay Transit Center Community Facilities District funds). At that time, the Board provided guidance to focus on conducting thorough outreach particularly to Communities of Concern, those without internet access, and to monolingual communities. We committed to doing so and noted that we would report back on outreach efforts in the fall, when we came in for the remaining \$500,000 in Prop K funds as budgeted. We also planned to continue seeking external funds for public engagement.

DISCUSSION

Since June 2020, the Study has completed its first major round of stakeholder engagement work to gather input on how to design an equitable and effective congestion pricing program, focusing on historically underrepresented groups, including low-income



communities, communities of color, non-English speakers, seniors, and people with disabilities. Between August and October, 2020, we reached out to over 250 community groups and held more than 80 virtual/telephone public meetings, stakeholder group meetings, and workshops. We also gathered input through multilingual digital and SMS text surveys. Publicity was multilingual and included posters, advertisements, earned media, and social media.

The purpose of this round of outreach was to seek input on the goals for a congestion pricing program, as well as input on major policy tradeoffs, such as:

- Which drivers should receive a discount or exemption, and which drivers should pay the full congestion fee?
- Where should the revenue from a congestion pricing program go?
- Should the zone boundary be modified, and if so how?

Our outreach methods were well received, particularly the online survey "Unclog Fog City," its text-based version, and co-creation sessions with low income and communities of color, whereby host organizations and participants were directly compensated for participating in 2-hour sessions. A Summary Report of Outreach and Outreach Findings is included as Attachment A.

Major themes that we heard include:

- Overall, input varied widely on the idea of congestion pricing.
- The most common concerns with congestion pricing include affordability; quality and availability of public transit alternatives to driving; and the potential for effects on business competitiveness.
- Income-based discounts and exemptions for the fee and for public transit are a top priority.
- The most popular benefits sought from congestion pricing include improvements to transit service, and the health and quality of life benefits of reduced traffic.
- Investment in transit was most popular use of revenues across all outreach formats, closely followed by pedestrian and bicycle safety upgrades.

Following the late summer/early fall outreach, our study team developed several congestion pricing policy alternatives which had been screened through prior stages of work and refined through technical studies and public input. The PAC reviewed these options at its meeting on November 12. Key policy features we discussed included:

- Means-based exemptions and discounts in all scenarios, including a 100% discount for very low-income drivers and a minimum 50% discount for low income drivers. One scenario expands the discount to moderate income drivers and deepens the discount for low income drivers.
- A discount for drivers with disabilities in all scenarios.
- A daily cap on the congestion pricing fee in all scenarios.



- A per-trip fee for TNC riders in all scenarios.
- Some scenarios also include further transit fare subsidies and congestion fee discounts beyond those for low income drivers: for middle- and high-income residents and for bridge-toll payers.

Technical work on the Study now focuses on a detailed analysis of these scenarios relative to goals and performance metrics adopted by the PAC in April 2020. As noted above, the current request for \$550,000 in Prop K funds would fund the June 2020 expansion of the existing project scope to include additional community outreach and the three month extension of the project schedule, as well as \$50,000 in funding originally anticipated to come from external grants. We had identified tentative external grants in the amount of \$150,000; however, these were withdrawn by the funders following the economic impacts caused by the COVID-19 pandemic. To fully fund the \$2.9 million study budget estimated in June 2020, we recommend: redirecting \$50,000 in previously appropriated Prop K funds originally budgeted for SFMTA towards the outreach scope of work; reducing the remaining budget contingency by \$50,000; and adding \$50,000 to the originally anticipated \$500,000 in new Prop K funds, resulting in the subject \$550,000 appropriation request.

Shelter in Place requirements put in place in March 2020, along with input from the PAC and public, have resulted in adaptations to the study affecting cost and schedule, including:

- Reworking the stakeholder outreach approach into fully socially-distanced formats to comply with Shelter in Place;
- Delays in scheduling meetings with stakeholders; and a greater number of co-creation workshop events and outreach modes, to accommodate smaller average group sizes and telephone-based workshop formats.

As we plan for the next round of Study outreach this Winter, we will consider options to modify the Study scope, schedule and/or budget to maintain the high level of public engagement we are conducting through the remaining stages of the study, including seeking external grants. Ideally, our Study schedule could extend to June 2021, given the continuing high level of public impacts in the Study, and the impact of COVID-19 on our outreach activities and resources. We will continue to seek external grants and may return early next year with another update of the Study and a final funding request, if warranted.

Attachment 1 summarizes the subject allocation request, including information on proposed leveraging (i.e. stretching Prop K sales tax dollars further by matching them with other fund sources) compared with the leveraging assumptions in the Prop K Expenditure Plan. Attachment 2 includes a brief description of the need for the project and the expanded scope of work. Attachment 3 summarizes the staff recommendations for the requests, highlighting special conditions and other items of interest. Attachment 5 is the Allocation Request Form for the project, with more detailed information on scope, schedule, budget and funding.

FINANCIAL IMPACT

The recommended action would appropriate \$550,000 in Prop K funds. The appropriation would be subject to the Fiscal Year Cash Flow Distribution Schedules contained in the enclosed Allocation Request Form.



Attachment 4 shows the approved Fiscal Year (FY) 2020/21 allocations and appropriations to date, with associated annual cash flow commitments as well as the recommended allocations, appropriation and cash flow amounts that are the subject of this memorandum.

Sufficient funds are included in the adopted FY 2020/21 budget to accommodate the recommended actions. Furthermore, sufficient funds will be included in future budgets to cover the recommended cash flow distribution for those respective fiscal years.

CAC POSITION

The CAC will consider this item at its December 2, 2020 meeting.

SUPPLEMENTAL MATERIALS

Project Status Update Materials

- Attachment A - Summary Report of Outreach and Outreach Findings

Appropriation Request Materials

- Attachment 1 - Summary of Requests
- Attachment 2 - Project Descriptions
- Attachment 3 - Staff Recommendations
- Attachment 4 - Prop K Sales Tax Allocation Summaries - FY 2020/21
- Attachment 5 - Allocation Request Form



Downtown Congestion Pricing Study

Outreach Findings

Spring – Fall 2020

Introduction

A primary objective of the Downtown Congestion Pricing Study is to ensure low-income communities of color would be helped and not harmed by a congestion pricing policy. Recognizing that low-income communities of color have historically been excluded from and often harmed by the planning process, the project team is working to lead the study with equity by inviting these communities to be collaborators in the outreach and engagement process.

The team kicked off the study in winter 2019 by hosting listening sessions with community leaders to get initial input on the study topic, process, and convening a Policy Advisory Committee with strong representation from equity-focused organizations to advise the project team throughout the study. With guidance from these stakeholders, the team developed an outreach strategy focused on working in collaboration with community organizations to design co-creation workshops that are accessible and relevant to their communities.

The team conducted the first large phase of community outreach from February to October 2020. This outreach round was paused when the global pandemic hit. The Policy Advisory Committee advised the project team to continue outreach with the study, recognizing that without intervention, a future economic recovery is likely to bring a return of traffic congestion and its negative impacts. The team then updated the study's outreach tools from in-person to remote with the goal of maintaining an equitable outreach strategy in a socially distant world.

During this first large phase of community outreach for the study, the project team introduced the concept of congestion pricing to the community and gathered feedback on the general concept of congestion pricing along with a long list of policy questions, such as:

If congestion pricing was implemented, how much should the fee be?

Who should receive a discount or exemption?

Where should the revenue go?

This memo outlines outreach activities and a synthesis of feedback from the first large phase of community outreach. Feedback from this phase of outreach will be used to inform a “short list” of three congestion pricing proposals that the project team will take back to the community for feedback during a second large phase of outreach in winter 2021.

Feedback Tools

The project team utilized the following channels to notify community stakeholders and gather feedback:

- **20+ Co-Creation workshops with 159+ participants** from Communities of Concern, including:
 - 5 workshops in Spanish
 - 7 Cantonese-only workshops
 - 1 mixed Cantonese-English workshop
- Reached out to **250+ community organizations**, resulting in **60+ meetings with community groups and the public**, including groups in all 11 San Francisco districts and regional stakeholders
- **1,000+ digital survey responses** (Unclog Fog City game) and almost **300 text survey responses** representing all 11 San Francisco districts and regional stakeholders
- **Custom in-language surveys** distributed through Russian American Community Center to the Russian community and through Self-Help for the Elderly to Chinatown business owners
- **Digital outreach**
 - 50K+ impressions and 350+ comments on social media
 - 3,052 unique visits to project webpage
 - 1,651 unique visits to blog
 - 587 views of congestion pricing videos
 - Email correspondence with stakeholders - over 70 emails received from the public
- [WalkSF report](#) of input they gathered from **280+ outreach session participants** in the Tenderloin, SoMa, and Bayview

Publicity Tactics

- **400+ multilingual posters in key corridors** in SoMa, Excelsior, Outer Mission, Ingleside, Oceanview, and Bayview
- **20 multilingual posters** in downtown parking garages
- **Spanish and Chinese newspaper advertisements** placed in Sing Tao and El Tecolote
- **Earned media** in several outlets (cumulative circulation/viewership estimated to be at least 349,000 people)
 - San Francisco Examiner
 - San Francisco Chronicle
 - Sing Tao
 - Mission Local
 - KTVU morning show
- **Digital outreach**
 - Website, NextDoor, Facebook, Twitter, Instagram, WeChat, LinkedIn

Summary Key Findings

Overall themes

- **Input varied widely** on whether congestion pricing is a good idea, from very opposed to strong enthusiasm. For example, members of the Human Rights Commission Community Roundtable expressed strong opposition to the idea, due mostly to equity concerns. Meanwhile, members of Urban Environmentalists expressed strong support for the concept, noting its environmental and livability benefits. In general, the co-creation workshops and digital survey input channels, both of which allowed participants to design a recommended program while learning about the options and weighing tradeoffs themselves, resulted in higher levels of support for congestion pricing than other outreach methods that did not feature a strong co-design approach.
- The **most common concerns** included affordability for people with low and moderate incomes, existing challenges with public transit due to COVID-19, what the recovery from the pandemic and recession will look like, and effects on businesses.
- The **most popular benefits** included transit improvements and health and quality of life improvements for congested areas.
- **Income-based discounts and exemptions** for the congestion pricing fee and for public transit were a top priority.
- **Investment in transit was most popular** across all outreach formats, closely followed by pedestrian and bicycle safety upgrades.

Key findings from the neighborhood level

- **Hayes Valley** residents wanted Octavia Blvd to be inside the boundary.
- **Mission Bay** stakeholders had varied opinions, some supportive and some not supportive of the congestion pricing and whether the neighborhood should be included in the zone.
- **Chinatown** stakeholders had widespread concerns about effects on equity and merchants as well as concerns about being inside the boundary.
- **Tenderloin** residents were interested in potential safety and transit benefits
- Neighborhoods near the border, such as **Potrero**, **Mission** and **Japantown** did not want the boundary to split their neighborhoods.
- **Bayview** residents had concerns about how to get downtown given the difficulty of public transit in southeast San Francisco.

Limitations of Outreach

- **Regional outreach:** The Policy Advisory Committee strongly encouraged the project team to conduct thorough outreach to regional stakeholders, particularly those who have been displaced from San Francisco and have limited public transit options to access the city. About 35% of the text and online survey respondents live in the greater Bay Area region. However, the project team continues to work to establish relationships with equity-based regional partners for co-creation. Many regional stakeholders said that congestion pricing outreach is not a priority for them given that only a fraction of their

communities regularly travel to San Francisco, and that staff are currently addressing other challenges facing their communities. For this reason, the project team has planned remote outreach workshops for late October. Rather than partnering with community organizations to co-host these workshops, the project team will host them and recruit participants through community organization networks and flyer-ing.

- **Demographic breakdown of online survey respondents:** About half of respondents provided “optional” demographic information on the online survey. Of those who did complete the demographic information, the respondent breakdown differed from San Francisco’s population, skewing more white and higher income. The project team focused much of its outreach strategy on co-creation workshops which focused on gathering in-depth feedback from low-income communities of color to ensure the study process included thorough feedback from historically underinvested communities.

Key Findings from Co-Creation Workshops

Co-Creation Overview

Central to the engagement strategy is a series of collaborative “co-creation” workshops held in partnership with organizations in historically underinvested communities. These workshops seek to build creative solutions through deep and accessible community engagement. The project team workshoped policy ideas with community members during the first series of workshops and will return to the community a second time to continue to iterate on policy ideas. Co-hosts and participants receive compensation for their time.

During the first phase of workshops for the study, participants engaged in a card game where they balanced tradeoffs to design a potential congestion pricing program. In small groups, participants chose from a set of discounts/exemptions and then a set of investments, each costing a number of “tokens.” Participants then chose a peak period congestion fee which provides a number of tokens to pay for the other elements of their congestion pricing policy or could choose a “no fee” option and no discount or investment cards. Participants could iterate as needed to develop a balanced overall program. Although most sessions came to agreement on all the program elements, some were inconclusive with participants selecting discount and investment cards but not reaching agreement on the fee element to create a balanced program.

CARD GAME INSTRUCTIONS

Blue SUBSIDY cards: Each card includes a discount or exemption to help protect certain groups. Choose as many blue subsidy cards as you want.

Red INVESTMENT cards: Each card includes transportation improvements to make it easier to get downtown without a car. Choose as many red investment cards as you want.

Green FEE cards: Choose a fee to enter or exit the congestion pricing zone.

ANALYZE: Do you have enough tokens from your FEE card to pay for your congestion pricing program? If not, choose a higher FEE card or remove some SUBSIDY or INVESTMENT cards.

FEE

\$12 for moderate, middle, and high income drivers

\$6 for low income drivers

\$0 for very-low income drivers

COLLECT **7** TOKENS

SUBSIDY

Discounted transit for more low-income riders

Expand the Lifeline program to provide discounted local and regional transit fares to downtown for more low-income riders.

Example low-income definition based on household size:
1 person < 65k annually
2 people < 75K
3 people < 85k
4 people < 95k

SPEND **3** TOKENS

INVESTMENT

Transit improvements

Provide more frequent buses on 10 congested or underserved Muni and regional routes serving downtown.

SPEND **2** TOKENS

After the pandemic hit, the project team worked with co-hosts to develop a remote co-creation model where participants received physical workshop kits in the mail and joined a call or webinar with project staff to go through the workshop. Collaboration with household members was encouraged.

The project team made adjustments based on the needs of each community, including hosting workshops in-language and adjusting the timing to accommodate constraints in communities hard-hit by the pandemic. In some cases, organizational capacity constraints due to COVID meant the team needed to find a different co-host to work with a community.

Due to schedule changes in response to the pandemic, the components of the card game changed between spring 2020 when the project team initially launched outreach, and summer/fall 2020, when the project team had updated modeling information. For example, the summer/fall version of the game featured a one-way inbound fee instead of the two-way fee featured in the spring 2020 version of the game. These limitations are reflected in the analysis below.

The information represented here is synthesized from co-creation workshops from February to early October 2020. The planned upcoming regional workshops being hosted for those outside of San Francisco have not been incorporated into the findings yet.

Participant Information

Workshop Location	Community Partner	Total Attendees	Languages Used
Bayview	Young Community Developers & APRISF	30	English
Chinatown	Chinese Newcomers	17	English and Cantonese
Excelsior	Excelsior Works!	27	Cantonese
Mission	MEDA	13	English and Spanish
Mission Bay	CCDC	20	English
Mixed	El Centro & Senior and Disability Action	15	English and Spanish
SoMa	BiSHoP	3	English
Tenderloin	Central City SRO Collaborative	23	English and Spanish
Visitacion Valley	APA Family Support Services	4	English
West Side (Richmond + Sunset)	Self-help for the Elderly	7	Cantonese
Total		159	

Overall Themes

Theme 1: San Francisco has an affordability crisis and study recommendations should prioritize advancing equity and affordability.

People and small businesses in San Francisco struggle with affordability

- Many participants are concerned about housing and overall unaffordability.
- Increased travel costs would further strain budgets for families, workers, and small businesses.
- Affordability was a common primary concern for congestion pricing; this may have been why 10 sessions (about 24% of all sessions) wanted no fee at all or very low fees for drivers (\$1-3)

Participants overwhelmingly prioritized income-based discounts and exemptions over other types of discounts and exemptions.

- Very-low- and low-income communities should be a top priority and protected from fee costs. Some participants said that everyone in both very-low and low-income categories should get a full exemption.
- The income levels should be expanded to help moderate-income individuals. Of note, there is a heavy impact on individuals who are right on the cusp of being able to receive income-based social services but still have to grapple with the high expenses of San Francisco.
- There are many implementation questions/concerns:
 - How would someone get the subsidy (in terms of process) and how would that eligibility be verified?
 - How can people easily get this subsidy without going through lots of hoops and hurdles?
 - How would the government prevent abuse of the system (i.e. someone using another person's low-income status pass)?
 - Just because a subsidy exists, it doesn't mean that everyone who qualifies would get it. Very-low to low-income individuals may not know about subsidy, be afraid to get it because it'll get counted as public charge, have language barriers, etc.

A majority of participants prioritized transit discounts

- Many participants talked about how public transit is currently too expensive, and that it is actually cheaper to call an Uber/Lyft.
- Some participants brought up a need for seniors to be subsidized for transit, including those that may not be covered under means-based subsidy.

Some support for a discount for people with disabilities

- Some participants prioritized this discount because it is difficult for people with disabilities to get around and they should not have to pay more.

Some support for a bridge toll discount

- Though participants often supported this, usually they would prioritize income-based discounts and exemptions and public transit improvements over this discount.
- A small group of participants did choose this discount, and usually it was in consideration of workers who need to commute from the East Bay to get to San Francisco. They thought it would be too much for someone to pay both the bridge toll and congestion fee.

Some support for a resident discount

- There is some support for a downtown resident-based subsidy because they felt the idea of paying the congestion fee to go in and out of the area they live in is "ridiculous."
- However, some people noted that if someone is a high-income resident, they should not get this discount.
- Some people went further to say that residents should be fully exempted from the fee.

Some support for a daily cap

- Some parent participants spoke strongly about the impact of congestion pricing on their childrens' needs (school drop offs and pickups multiple times a day, it's more convenient to drive, it's safer to drive with young kids, etc.). They think congestion pricing would be unfair given this.

Theme 1 take-aways for program design:

- **Prioritize income-based discounts and exemptions while including other discount options in scenarios.**

Theme 2: Participants overwhelmingly prioritized public transit investments and emphasized the need for improvements to happen prior to a congestion fee.

Participants want major improvements to transit

- Improvement needs cited included:
 - More frequent and reliable service
 - Adding routes and stops
 - Safer and cleaner transit (less crime, fewer collisions, overcrowding)
 - More parking around transit hubs
 - Less crowding
 - Add different types of transit options (shuttles, pedicabs, bike shares)
- Some participants had questions around the future of transit given service cuts and usage due to COVID-19.
- Some participants emphasized the importance of improving transit before a congestion pricing is put in place, especially for neighborhoods like the Bayview. Some were skeptical about the government's ability to improve transit on a promised timeline based on past experiences with delayed transit improvement projects.

Pedestrian and bicycle safety upgrades were the second highest priority investment

- The majority of participants prioritized safety improvements, citing needs such as longer crosswalk times, dedicated signage, more bike lanes etc.
- Some participants don't feel safe on the streets because of poor behavior by some bicyclists, skateboarders, scooters, etc. and created their own investment card for pedestrian and bicycle safety education and law enforcers.

Street repaving was popular

- Nearly half of participants supported having roads repaved, citing currently poor conditions.
- Some participants noted that the construction associated with street repaving can itself cause congestion.

Transit ambassadors were popular

- Many participants supported transit ambassadors, correlating this support with feelings of unsafety in San Francisco, specifically on transit systems.
- Some participants thought this idea was currently too vague and would like to see more detail about how this would actually help increase safety on transit use.

There was interest in school buses and general education investments

- Some participants wanted increased school buses so that their children could have more options to get to school.
- Beyond school buses, there was also a pattern of participants creating broader school/education investments, such as funding for after school youth programs, funding for school supplies, or special bus tickets for students to go to downtown museums for learning.

There was interest in improved paratransit and improved disability accommodations overall

- A number of participants spoke about the importance of having improved paratransit options for people with disabilities so that it is easier for them to get around.
- In addition to paratransit shuttles, some advocated for better disability accommodations overall, especially on buses and in Uber/Lyfts.

Theme 2 take-aways for program design:

- **Prioritize investment funds for transit and safety improvements and consider other investment ideas depending on funding available.**

Theme 3: Most co-creation participants chose a fee level of at least \$10, provided it would fund a package of discounts and investments.

- Of the 42 sessions¹ conducted, 32 sessions (about 76%) decided on a fee of at least \$10, while the remaining 10 sessions (about 24%) wanted no fee at all or very low fees for drivers (\$1-3). Of these, 6 sessions decided on “no fee” (meaning no congestion pricing), 3 sessions decided on very low fees of \$1-3, and 1 session decided on no fee to drivers while passing on the fee to companies.
- The average group selected two discounts and three investments as part of its proposed policy. For example, a group who selected a \$12/6/0 fee structure would do so in tandem with 3 investments such as transit improvements, bike and pedestrian safety upgrades, and school buses, and 2 discounts and exemptions such as free transit for very-low income riders, and discounted transit for more low-income riders.

Theme 3 take-aways for program design:

- **The fee levels selected by most participants were close to the range under consideration for the study.**

¹ A “session” is defined as a breakout session within a co-creation workshop. Participants in each breakout session tried to reach agreement on a proposed program package.

- **The final policy recommendation should consider how many investments and other benefits the fee can fund, and if there are enough benefits funded given the community's expectations for revenue usage.**

Theme 4: Uber and Lyft should pay their fair share.

- Strong participant sentiments that ride-hail services (Lyft and Uber) are a major cause of congestion.
- Some participants went beyond ride-hail companies and named other tech companies and major corporations as responsible for helping address the congestion problem that they have disproportionately contributed to.
- Participants' attitudes toward Lyft and Uber drivers were mixed. There was some concern about Lyft and Uber passing any potential increase in their expenses to drivers or riders. Some participants cited drivers as also low-income community members, so it would be unfair for expenses to get passed to them. Some participants didn't like the congestion that ride-hail caused while others benefit from these services to get around the city.

Theme 4 take-aways for program design:

- **Include fees for ride-hail users to ensure their congestion impacts are addressed, while also maintaining affordability for those who have limited resources and rely on these services for their transportation needs.**
- **Pair a congestion pricing program with employer-based transportation demand strategies.**

Theme 5: The current state of our streets is unacceptable.

It's not safe

- Participants are concerned about being able to move about safely on streets, ranging from fear of traffic collisions to seeing drugs and alcohol usage in public.
- Public transit doesn't necessarily feel safe either, with participants citing regular fights and pickpocketing that happens in those settings.
- Participants also want their city to be cleaner in terms of the environment and the air.
- Some participants talked about police violence they've experienced in San Francisco.
- Some small business owners talked about their stores being robbed.

There is a lot of congestion

- Participants generally agree that there is a lot of congestion both getting in/out of the city and within the city. They would like to see less congestion in San Francisco.
- Small business owners talked about the difficulty congestion causes for their businesses, which are already hurting. They spoke particularly in terms of difficulty for deliveries and congestion being a deterrent for potential customers to come into the city.

The government isn't helping as much

- Many participants talked about distrust in government and past harms that government has caused.
- Many participants talked about their lack of faith in government's follow-through in creating positive change, including street pavement in poor condition and long delays in Central Subway construction.
- Participants named the needs for transparency and fairness as values to build trust with the government.

Theme 5 take-aways for program design:

- **Include improvements in investment proposals that would improve safety and perceptions of safety, such as bicycle and pedestrian safety measures and transit ambassadors.**
- **Continue to include robust community engagement as the program planning and design process continues.**

Theme 6: A number of participants proposed revising and contracting the zone boundaries.

- Some participants thought that only the most congested traffic streets should be in the zone, but not the entirety of the map itself.
- Participants from the Mission didn't want the zone boundary to split the neighborhood and wanted the boundary to be moved north closer to the Central Freeway.
- Some participants were concerned that the zone would push traffic to the borders and negatively impact adjacent underinvested communities.
- Chinatown had significant concerns about being in the zone, with the sentiment that it would negatively affect equity and merchants.
- Some participants from underinvested neighborhoods on the outskirts of San Francisco, like the Bayview, felt that they would be disproportionately affected by a large zone because currently they are forced to go into the downtown area to get basic services, groceries, etc. Residents had concerns about how to get downtown given the difficulty of public transit in southeast San Francisco.

Theme 6 take-aways for program design:

- **The zone boundaries should be adjusted to still include the most congested areas and ensure overall program viability, but with more sensitivity to individual neighborhood boundaries.**

Theme 7: The co-creation process sparked new ideas and highlighted unique concerns from community members.

Idea: Add a positive reinforcement/reward component suggestions included:

- Point system for riding public transit that gives free congestion pricing passes.

- Community service in exchange for free transit/congestion pricing options (especially for low-income people who can't afford congestion pricing).
- Exemptions for other transport options, i.e. motorcycles, electric cars.
- Monthly passes vs. per ride purchases that can reduce overall fee.

Idea: Worker-based/distance-based discounts and exemptions

- Some participants thought someone commuting for work to downtown should have discounts and exemptions or the cost could be directed to employers, particularly for San Francisco residents (i.e. Bayview) and East Bay commuters.

Idea: Invest in traffic control officers

- A small number of participants wanted more traffic directors who can enforce traffic rules and help move traffic along during congested times.

Concern: Some participants said there should be special consideration for seniors and college/graduate students who may not be protected enough by the means-based discounts.

Concern: A small number of participants had mixed feelings about congestion pricing and tourism. Some worried that congestion pricing would have a negative impact on tourism while some thought tourists should be charged a higher congestion fee.

Theme 7 take-aways for program design:

- **Consider pairing other incentives and transportation demand management strategies with a congestion pricing program, including for tourists**
- **Consider additional parking and traffic control officers as a potential investment with program revenue**
- **Continue to consider other ideas participants suggest as program design evolves**

Co-Creation Quantitative Data²

Overall Fees Chosen

	Regular Fee	Low Income	Very Low Income
Average	\$10.12	\$4.83	\$1.83
Median	\$12.00	\$6.00	\$0.00
Most Common Selection	\$12.00	\$6.00	\$0.00

Average Fee By Neighborhood (n=number of breakout sessions per neighborhood)

	Regular Fee	Low Income	Very Low Income
Bayview (n=7)	\$12.33	\$2.00	\$0.00
Chinatown (n=4)	\$3.00	\$1.50	\$0.00
Excelsior (n=6)	\$7.33	Information not available	
Mission (n=6)	\$12.29	\$6.14	\$2.86
Mission Bay (n=4)	\$15.00	\$8.00	\$4.40
Mixed - El Centro (n=2)	\$12.00	\$6.00	\$0.00
Mixed - SDA (n=2)	\$6.00	\$3.00	\$0.00
SoMa (n=2)	\$20.00	Information not available	
Tenderloin (n=6)	\$9.67	Information not available	
Visitation Valley (n=1)	\$12.00	Information not available	
West Side (n=2)	\$1.50	\$0.00	\$0.00

2

Co-creation data analysis limitations:

1. The findings and themes in this document do not include the last remaining co-creation workshops which took place after 10/2/2020, which includes workshops for those in Oakland, Richmond, etc.
2. Data set is inconsistent between the spring 2020 and summer/fall 2020 game versions and across workshops, which means some information is not available. For example the income discount card options changed between the spring 2020 and summer/fall 2020 game versions - the earlier version did not group income-based discounts with overall fee levels or distinguish between the low- and very-low income categories.
3. Variations across the number of co-creations facilitated at each neighborhood means that neighborhoods with more workshops will have their results represented more heavily.
4. Notes and workshop reporting were taken in varying formats, which may affect data representation and interpretation for results.

Discounts, Investments, and Fee Overall Popularity

Type	Neighborhood	# of Times Card Selected	% of Groups Who Selected Card
Discount Cards	Free transit for very low-income riders	24	59%
	Discounted transit for more low-income riders	21	51%
	Bridge toll-payer discount	14	34%
	Drivers with disabilities discounts	14	34%
	Create Your Own	14	34%
	Maximum daily charge	8	20%
Investment Cards	Transit improvements	27	66%
	Pedestrian and bicycle safety upgrades	21	51%
	Street repaving	19	46%
	Transit ambassadors	18	44%
	Add school buses	15	37%
	Create Your Own	11	27%
	Improved Paratransit	8	20%
Old Fee cards	\$4 peek period fee	6	15%
	\$6 peek period fee	5	12%
	\$5 peek period fee	2	5%
	Apply the fee to drive within the congestion pricing zone	2	5%
New Fee Cards	\$12/\$6/\$0	7	17%
	No Fee	5	12%
	\$10/\$5/\$5	3	7%
	\$14/\$7/\$0	2	5%
Both	Create Your Own	15	37%

Key Findings from Other Feedback Tools

Discounts + Exemptions

Income-based Discounts:

- Income-based discounts and exemptions were the top discount priority across all outreach channels.
- 37% of digital survey respondents prioritized free transit for very low-income (Lifeline) travelers – this was the top selection; 27% of survey respondents wanted discounted transit for more low-income riders. The digital survey included income-based congestion fee discounts in packages with the fee option levels.
- Income-based discounts were nearly universally prioritized in community presentations.
- Comments received via the text based survey, community presentations, social media, and email correspondence showed significant concern for low- and moderate-income people having to pay a fee.

Disability Discount:

- Discounts for drivers with disabilities was the next most popular discount in the digital survey (29%) after income-based discounts.
- Some text survey respondents and social media comments also said that discounts for disabled drivers were important.

Bridge Toll-payer Discount:

- About one in seven digital survey respondents selected a bridge toll-payer discount. Non-San Francisco participants were more likely to choose the bridge toll discount (20%) compared to 11% of San Francisco respondents.
- Some text survey respondents were in favor of a bridge toll discount, which often correlated with concern about low-income commuters.
- Participants in community presentations expressed frustration that congestion related to eastbound on-ramps to the Bay Bridge had returned – some noted that the bridge toll alone wasn't enough of a deterrent to driving to eliminate ramp-related congestion.

Resident Discount:

- Overall, approximately one in four digital survey respondents favored discounts for zone residents. One in three Eastside residents favored a discount for those in the zone.
- Digital and text survey participants expressed concern for low income residents of the zone in their comments.
- A number of social media commenters noted that they would only support a plan that offered a discount to zone residents.

Daily Toll Cap:

- A maximum daily charge was the least popular discount/exemption among digital survey participants, with only approximately one in ten selecting it, even among Eastside residents.
- The unique needs of parents were cited in open-ended comments across outreach channels, with a number of participants citing that parents may/do make multiple car

trips a day in/out of zone. However, participants did not necessarily link this travel pattern to a maximum daily charge.

Discount and exemption take-aways for program design:

- **Prioritize income-based discounts and exemptions while including other discount options in scenarios.**

Investments

Transit Improvements

- Transit improvements were the most popular investment choice across outreach channels. Two out of three digital survey respondents (67%) chose transit improvements as an investment. Two out of three text respondents cited transit improvements as a top investment choice.
- Participants in community presentations frequently referenced making Muni free/cheaper, more accessible to seniors/parents, and less crowded. Community presentation attendees also cited better regional transit as a priority.
- A number of open-ended comments in the text survey as well as on social media expressed concern that without transit improvements, congestion pricing would create additional challenges for those traveling downtown.
- Commenters on social media expressed concern about trying to shift more people to transit, given recent service reductions due to COVID-19.

Bicycle and Pedestrian Improvements

- Bicycle and pedestrian improvements were a close second to transit improvements for the most popular investment choice across outreach channels. 61% of digital survey respondents prioritized bicycle and pedestrian safety upgrades.
- Safety was a recurring theme in open-ended comments on the text surveys and in social media.

Improved Paratransit

- Approximately one in four digital survey respondents prioritized investment in improved paratransit.

Transit Ambassadors

- Approximately one in four digital survey participants selected transit ambassadors as an investment.
- Participants in community presentations, the text survey, and on social media noted a desire for Muni to be made more safe, often in the context of making it more accessible to parents, seniors, and people with disabilities.

Street Repaving

- Approximately one in four digital survey participants (24%) selected street repaving as an investment but wasn't frequently mentioned through other outreach channels.

Additional School Buses

- Survey comments and participants in community presentations voiced concerns about school transportation, but school buses were not prioritized as much as other investments by those who took the digital survey.

Investment take-aways for program design:

- **Prioritize investment funds for transit and safety improvements and consider other investment ideas depending on funding available.**

Pricing by Vehicle Type

- Many participants in community presentations and social media commenters cited the impact that Lyft and Uber have had on congestion in San Francisco and voiced concerns that Lyft and Uber should pay their fair share.

Pricing by vehicle type take-aways for program design:

- **Include fees for ride-hail users to ensure their congestion impacts are addressed, while also maintaining affordability for those who have limited resources and rely on these services for their transportation needs.**

Overall Fee Levels

- For those who engaged in the congestion pricing game via the digital survey, 44% preferred a \$14 fee, 27% selected a \$12 fee, 19% selected a \$10 fee, and 8% chose “no fee.”
- However, nearly three out of four text respondents expressed opposition to the idea of a fee.
- Participants who provided social media comments frequently voiced their concern over any additional fees, particularly for low-income drivers.

Fee level take-aways for program design:

- **Overall, most survey participants selected one of the fee level options under consideration for the study, particularly when providing feedback in the context of selecting an overall balanced package of discounts/exemptions, investments, and fees.**
- **The final policy recommendation should consider how many investments and other benefits the fee can fund, and if there are enough benefits funded given the community’s expectations for revenue usage.**

Boundary

- Open-ended comments received across outreach channels frequently described the congestion pricing zone being too large.
- Those who participated in public meetings had a variety of responses to the geography

- Neighborhoods in the zone:
 - Hayes Valley residents wanted Octavia Blvd to be inside the boundary
 - Mission Bay stakeholders had varied opinions, some supportive and some not supportive of the congestion pricing and whether the neighborhood should be included in the zone
 - Chinatown stakeholders had concerns about effects on equity and merchants
 - Tenderloin residents were interested in potential safety and transit benefits
- Neighborhoods near the border:
 - Potrero, Mission and Japantown stakeholders did not want the boundary to split their neighborhoods

Boundary take-aways for program design:

- **The zone boundaries should be adjusted to still include the most congested areas and ensure overall program viability, but with more sensitivity to individual neighborhood boundaries.**

Attachment 1: Summary of Requests Received

Source	EP Line No./ Category ¹	Project Sponsor ²	Project Name	Current Prop K Request	Total Cost for Requested Phase(s)	Leveraging		Phase(s) Requested	District(s)
						Expected Leveraging by EP Line ³	Actual Leveraging by Project Phase(s) ⁴		
Prop K	143	SFCTA	Downtown Congestion Pricing	\$ 550,000	\$ 2,800,000	NA	80%	Planning	Citywide
TOTAL				\$ 550,000	\$ 2,800,000	0%	80%		

Footnotes

¹ "EP Line No./Category" is either the Prop K Expenditure Plan line number referenced in the 2019 Prop K Strategic Plan or the Prop AA Expenditure Plan category referenced in the 2017 Prop AA Strategic Plan, including: Street Repair and Reconstruction (Street), Pedestrian Safety (Ped), and Transit Reliability and Mobility Improvements (Transit) or the Traffic Congestion Mitigation Tax (TNC Tax) category referenced in the Program Guidelines.

² Acronyms: SFCTA (San Francisco County Transportation Authority)

³ "Expected Leveraging By EP Line" is calculated by dividing the total non-Prop K funds expected to be available for a given Prop K Expenditure Plan line item (e.g. Pedestrian Circulation and Safety) by the total expected funding for that Prop K Expenditure Plan line item over the 30-year Expenditure Plan period. For example, expected leveraging of 90% indicates that on average non-Prop K funds should cover 90% of the total costs for all projects in that category, and Prop K should cover only 10%.

⁴ "Actual Leveraging by Project Phase" is calculated by dividing the total non-Prop K or non-Prop AA funds in the funding plan by the total cost for the requested phase or phases. If the percentage in the "Actual Leveraging" column is lower than in the "Expected Leveraging" column, the request (indicated by yellow highlighting) is leveraging fewer non-Prop K dollars than assumed in the Expenditure Plan. A project that is well leveraged overall may have lower-than-expected leveraging for an individual or partial phase.

Attachment 2: Brief Project Descriptions ¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Requested	Project Description
143	SFCTA	Downtown Congestion Pricing	\$ 550,000	The Transportation Authority will study how congestion pricing downtown could achieve four key goals: get traffic moving, improve safety, clean the air, and advance equity. This study will evaluate alternative packages of congestion charges, discounts, subsidies, incentives, and multi-modal transportation improvements based on the program goals. The study will include extensive stakeholder and community outreach centered on low-income communities of color and other historically underinvested communities and will focus on how a congestion pricing program could be designed and implemented to advance equity. This request will fund additional outreach beyond the scope funded by a February 2019 Prop K allocation of \$500,000. The study is anticipated to be complete by June 2021.
TOTAL			\$550,000	

¹ See Attachment 1 for footnotes.

Attachment 3: Staff Recommendations ¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Recommended	Recommendations
143	SFCTA	Downtown Congestion Pricing	\$ 550,000	<p>Prop K 5-Year Prioritization Program (5YPP) Amendment: Fully funding this request requires an amendment to the Prop K Transportation Demand Management/Parking Management 5YPP to reprogram \$100,000 in FY 19/20 funds from the Emerging Mobility Pilots placeholder, \$200,000 in FY 19/20 funds from the Mobility as a Service Pilots placeholder, and \$50,000 in FY 20/21 funds from the ConnectSF Modal Study Follow On placeholder to the subject project. The amendment also requires reprogramming \$50,000 in FY 19/20 funds for the Commuter Benefits Ordinance Update to FY 21/22 and \$50,000 in FY 21/22 funds for the ConnectSF Modal Study Follow On placeholder to FY 20/21. These other projects and studies are not moving forward in the near term, while the Downtown Congestion Pricing Study is already underway and a priority to complete. See allocation request form for details.</p>
TOTAL			\$ 550,000	

¹ See Attachment 1 for footnotes.

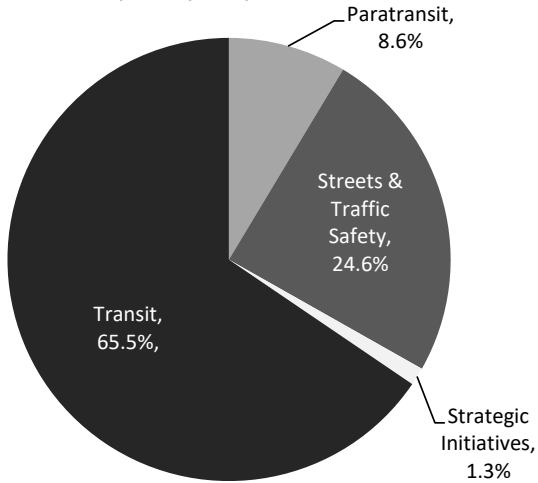
**Attachment 4.
Prop K Allocation Summary - FY2020/21**

PROP K SALES TAX

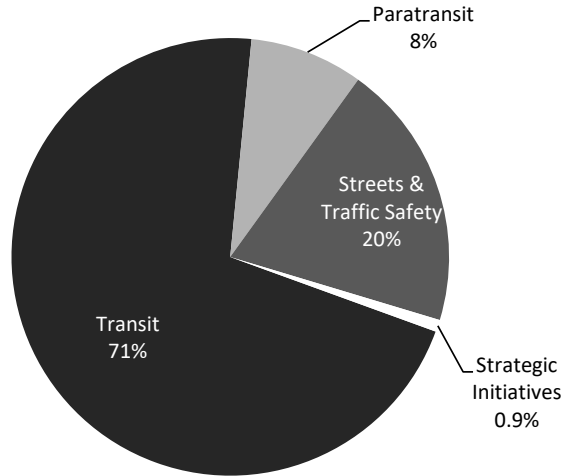
FY2020/21	Total	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	FY 2025/26
Prior Allocations	\$ 55,029,510	\$ 15,663,993	\$ 25,164,063	\$ 13,024,042	\$ 1,177,412	\$ -	\$ -
Current Request(s)	\$ 550,000	\$ 400,000	\$ 150,000	\$ -	\$ -	\$ -	\$ -
New Total Allocations	\$ 55,579,510	\$ 16,063,993	\$ 25,314,063	\$ 13,024,042	\$ 1,177,412	\$ -	\$ -

The above table shows maximum annual cash flow for all FY 2020/21 allocations and appropriations approved to date, along with the current recommended allocation(s).

**Investment Commitments,
per Prop K Expenditure Plan**



Prop K Investments To Date



Attachment 5

San Francisco County Transportation Authority Prop K/Prop AA Allocation Request Form

FY of Allocation Action:	FY2020/21
Project Name:	Downtown Congestion Pricing Study
Grant Recipient:	San Francisco County Transportation Authority

EXPENDITURE PLAN INFORMATION

Prop K EP categories:	Transportation Demand Mgmt
Current Prop K Request:	\$550,000
Supervisory District(s):	Citywide

REQUEST

Brief Project Description

Study how congestion pricing downtown could achieve four key goals: get traffic moving, improve safety, clean the air, and advance equity. Study will evaluate alternative packages of congestion charges, discounts, subsidies, incentives, and multi-modal transportation improvements based on the program goals. Extensive stakeholder and community outreach centered on low-income communities of color and other historically underinvested communities will focus the study on how a congestion pricing program could be designed and implemented to advance equity. Request will fund additional outreach.

Detailed Scope, Project Benefits and Community Outreach

The Transportation Authority's Downtown Congestion Pricing Study is anticipated to conclude by June 2021. This request will fund scope that is in addition to the scope funded with \$500,000 in Prop K funds, approved by the Board in February 2019. The additional scope is focused primarily on stakeholder outreach and includes:

- Additional Policy Advisory Committee 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.

In addition, \$150,000 in planned private funding for the original study scope did not materialize due to the pandemic and recession. \$50,000 of this request, in combination with budget reductions of \$55,595 from SFMTA and \$44,405 from the Transportation Authority, would cover this shortfall.

See attached full additional scope for details.

Project Location

Study area is northeastern San Francisco.

Project Phase(s)

Planning/Conceptual Engineering (PLAN)

Downtown Congestion Pricing Study 2020 Scope of Work Amendment

This additional scope of work for the Transportation Authority’s Downtown Congestion Pricing Study is in addition to the scope described the original February 2019 appropriation. The additional scope is focused primarily on stakeholder outreach and includes:

- Additional Policy Advisory Committee 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.

Note the study’s task structure has been adjusted from the original scope as follows:

Current task	Original tasks	
0. Project Management	1, 9	
1. Stakeholder Engagement	2	
2. Program Development	3, 4, 6, 8	
3. Technical Analysis	5, 7	

0. Project Management

0.1. Project Startup

No additional scope.

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 as well as a higher level of coordination required to integrate the workstreams and advance the scope of work.

0.3. Final Report

No additional scope.

1. Stakeholder Engagement

1.1. Stakeholder & Community Engagement Plan and Management

The additional scope and budget in this task address the need for increased coordination, management, and strategy development time for Task 1. 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 tasks. This includes:

- Ongoing Task 1 coordination and management, coordination of translation needs and materials
- Update and finalize stakeholder lists, conduct additional outreach to key stakeholders, schedule and conduct one-on-one interviews

- Develop a strategy and engage with stakeholders and audiences beyond San Francisco, such as organizations working with Communities of Concern

1.2. *Message Research and Development*

The study team will continue to 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 include coordination to involve community-based organizations in message refinement, the anticipated evolution of key messages throughout the life of the project, translation of refined messages, and planning and executing multilingual, multichannel advertising campaigns to notify the public about input opportunities. Notifications will include methods to reach members of the public with limited digital access, such as radio, print, and telephone/texting.

1.3. *Policy Advisory Committee (PAC)*

As a key group of stakeholders 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, the study team will convene two additional PAC meetings for a total of eight. Additionally, the study team is increasing the level of effort to support PAC meetings due to the complexity of the project and higher levels of coordination needed.

1.4. *Engagement Activities and Materials*

The study team will 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. Engagement methods are be designed to involve diverse stakeholders in socially-distanced outreach, including those with limited digital access, through virtual/telephone co-creation workshops, other engagement through CBOs, virtual/telephone town halls, a texting service, flyers, and advertising. The additional scope in this request includes:

- Outreach to Community-Based Organizations (CBOs): Develop a program for enhanced engagement with CBOs, working with them to determine the best ways to share surveys and input opportunities with their members and conduct broader engagement. This will include developing a plan to engage CBOs and working with them to reach their communities using the most effective tools.
- Co-Creation Workshops: Plan and convene 11 additional multilingual co-creation workshops in partnership with local CBOs 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, and logistics; preparation of event and staffing plan; material preparation, review, and delivery; travel if needed, meeting setup, 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, and the broader San Francisco community. Tasks include planning (content, strategy, partnerships), facilitation, and synthesis of outputs. Other expenses including co-designer and CBO co-host compensation, live translation, and material production and delivery.

- Translation of project outreach materials to support overall project and engagement needs. Materials may include those for workshops, surveys, advertisements, digital and telephone engagement, briefings, and other communications, as needed.

2. Program Development

2.1. Program Development Plan and Coordination

The additional scope and budget in this task address the need for increased coordination, management, and strategy development time for Task 2. 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 tasks. This scope also includes additional refinement of the Program Development Plan, which documents the study's process for developing and refining congestion pricing program proposals.

2.2. Technical Advisory Committee (TAC)

No additional scope.

2.3. Goals and Objectives, Purpose and Need

The additional budget covers additional refinement and review of the study Goals and Performance Metrics, including to incorporate PAC input prior to adoption.

2.4. Case Study Research

No additional scope.

2.5. Develop & Refine Program Definition, Identify Recommended Program

Based on inputs from tasks 1 and 3, the study team will develop congestion pricing program scenarios, alternatives, and a recommended program that best meet the goals 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 additional scope reflects additional effort due to extended project schedule, cross-workstream collaboration, and additional review and revision to incorporate stakeholder input.

2.6. Implementation Plan

No additional scope.

3. Technical Analysis

3.1. Technical Analysis Plan and Coordination

The additional scope and budget in this task address the need for increased coordination, management, and strategy development time for Task 3. 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 tasks.

3.2. Existing Conditions Data Gathering and Analysis

Additional existing conditions analysis and documentation included in this budget request helps inform program development and stakeholder engagement. This additional scope includes new data analysis in response to PAC input and supports creation of additional materials and content to support the PAC, TAC, co-creation, key messages, and Goals and Performance Metrics memo.

3.3. Analysis for Program Development & Stakeholder Engagement

The requested budget includes additional analysis and documentation in coordination with tasks 1 and 2 to support development and refinement of alternatives that are responsive to stakeholder input.

3.4. Cost and Revenue Estimates

The study team will provide additional support and coordination for the development of capital, operating, and maintenance costs. This includes working with task leads to best communicate cost information to stakeholders and incorporate program design changes as a result of stakeholder input into cost estimates.

Other planned and potential scope adjustments

The original study budget included \$150,000 in private contributions. However, these have not materialized due to the pandemic and recession. This Prop request includes \$50,000 to address a portion of this shortfall in combination with a \$55,595 budget reduction for SFMTA and a \$44,405 reduction in the Transportation Authority’s budget.

In addition, we are currently planning for the study’s second major round of outreach under Shelter in Place. The first round of outreach was more labor-intensive due to the pandemic, so we plan to develop and consider scope and funding options for the upcoming outreach round.

Schedule

The study schedule is below. Major rounds of outreach include:

- Step 2 listening phase
- Steps 3-4 to gather input on program features
- Step 5 to gather input on analyzed alternatives and a potential recommendation



5YPP/STRATEGIC PLAN INFORMATION

Type of Project in the Prop K 5YPP/Prop AA Strategic Plan?	Project Drawn from Placeholder
Is requested amount greater than the amount programmed in the relevant 5YPP or Strategic Plan?	Greater than Programmed Amount
Prop K 5YPP Amount:	\$200,000
Justification for Necessary Amendment	
<p>Fully funding this request requires an amendment to the Prop K Transportation Demand Management/Parking Management 5YPP to reprogram \$100,000 in FY 19/20 funds from the Emerging Mobility Pilots placeholder, \$200,000 in FY 19/20 funds from the Mobility as a Service Pilots placeholder, and \$50,000 in FY 20/21 funds from the ConnectSF Modal Study Follow On placeholder to the subject project. The amendment also requires reprogramming \$50,000 in FY 19/20 funds for the Commuter Benefits Ordinance Update to FY 21/22 and \$50,000 in FY 21/22 funds for the ConnectSF Modal Study Follow On placeholder to FY 20/21. These other projects and studies are not moving forward in the near term, while the Downtown Congestion Pricing Study is already underway and a priority to complete.</p>	

San Francisco County Transportation Authority

Prop K/Prop AA Allocation Request Form

FY of Allocation Action:	FY2020/21
Project Name:	Downtown Congestion Pricing Study
Grant Recipient:	San Francisco County Transportation Authority

ENVIRONMENTAL CLEARANCE

Environmental Type:	Categorically Exempt
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PROJECT DELIVERY MILESTONES

Phase	Start		End	
	Quarter	Calendar Year	Quarter	Calendar Year
Planning/Conceptual Engineering (PLAN)	Jan-Feb-Mar	2019	Apr-May-Jun	2021
Environmental Studies (PA&ED)				
Right of Way				
Design Engineering (PS&E)				
Advertise Construction				
Start Construction (e.g. Award Contract)				
Operations (OP)				
Open for Use				
Project Completion (means last eligible expenditure)				

SCHEDULE DETAILS

Timeline for key remaining tasks:
 Task 0: Project management - Ongoing. Final Report to be drafted by June 2021.
 Task 1: Stakeholder engagement - Next major round of outreach planned to begin in March 2021, results anticipated to be shared in March CAC and April Board presentations.
 Task 2: Program development - Draft program recommendations to be developed based on ongoing scenario analysis and winter outreach, then shared in planned June CAC and July Board presentations.
 Task 3: Technical analysis - Detailed scenario analysis to be completed by January 2021. Cost and revenue estimates for final recommendation to be completed in spring 2021 and included in final report.

San Francisco County Transportation Authority Prop K/Prop AA Allocation Request Form

FY of Allocation Action:	FY2020/21
Project Name:	Downtown Congestion Pricing Study
Grant Recipient:	San Francisco County Transportation Authority

FUNDING PLAN - FOR CURRENT REQUEST

Fund Source	Planned	Programmed	Allocated	Project Total
PROP K: Transportation Demand Mgmt	\$350,000	\$200,000	\$500,000	\$1,050,000
BAY AREA TOLL AUTHORITY FUNDS	\$0	\$0	\$400,000	\$400,000
TRANSBAY TRANSIT CENTER COMMUNITY FACILITIES DISTRICT FUNDS	\$0	\$0	\$880,000	\$880,000
TRANSBAY TRANSIT CENTER DISTRICT DEVELOPER FEES	\$0	\$0	\$470,000	\$470,000
Phases in Current Request Total:	\$350,000	\$200,000	\$2,250,000	\$2,800,000

COST SUMMARY

Phase	Total Cost	Prop K - Current Request	Source of Cost Estimate
Planning/Conceptual Engineering (PLAN)	\$2,800,000	\$550,000	Costs to date and estimated cost based on similar work
Environmental Studies (PA&ED)	\$0	\$0	
Right of Way	\$0	\$0	
Design Engineering (PS&E)	\$0	\$0	
Construction (CON)	\$0	\$0	
Operations (OP)	\$0	\$0	
Total:	\$2,800,000	\$550,000	

% Complete of Design:	0.0%
As of Date:	N/A
Expected Useful Life:	N/A

San Francisco County Transportation Authority

Prop K/Prop AA Allocation Request Form

MAJOR LINE ITEM BUDGET

ORIGINAL BUDGET SUMMARY*

	0. Project Management	1. Stakeholder Engagement	2. Program Development	3. Technical Analysis	Total
SFCTA	\$ 158,957	\$ 247,726	\$ 184,667	\$ 220,233	\$ 811,584
SFMTA	\$ 500	\$ -	\$ 51,570	\$ 3,525	\$ 55,595
Consultant	\$ 36,000	\$ 437,000	\$ 144,000	\$ 80,000	\$ 697,000
Contingency					\$ 235,822
Total (Original)	\$ 195,457	\$ 684,726	\$ 380,237	\$ 303,758	\$ 1,800,000

ADDITIONAL BUDGET SUMMARY (subject of current request: \$550,000 Prop K, \$450,000 other)

	0. Project Management	1. Stakeholder Engagement	2. Program Development	3. Technical Analysis	Total
SFCTA	\$ 118,604	\$ 185,504	\$ -	\$ -	\$ 304,108
SFMTA	\$ (500)	\$ -	\$ (51,570)	\$ (3,525)	\$ (55,595)
Consultant	\$ 213,893	\$ 422,720	\$ 96,004	\$ 42,384	\$ 775,000
Contingency					\$ (23,513)
Total (Current Request)	\$ 331,997	\$ 608,224	\$ 44,434	\$ 38,859	\$ 1,000,000

TOTAL BUDGET WITH THIS REQUEST

	0. Project Management	1. Stakeholder Engagement	2. Program Development	3. Technical Analysis	Total
SFCTA	\$ 277,561	\$ 433,230	\$ 184,667	\$ 220,233	\$ 1,115,692
SFMTA	\$ -	\$ -	\$ -	\$ -	\$ -
Consultant	\$ 249,893	\$ 859,720	\$ 240,004	\$ 122,384	\$ 1,472,001
Contingency					\$ 212,308
Grand Total	\$ 527,454	\$ 1,292,950	\$ 424,671	\$ 342,617	\$ 2,800,000

DETAILED LABOR COST ESTIMATE

SFCTA	Hours	Base Hourly Rate	Overhead Multiplier	Fully Burdened Hourly Cost	Total
Deputy Director	490	\$ 102.60	\$ 2.62	\$ 268.80	\$ 50,466
Sr. Transportation Planner	460	\$ 61.66	\$ 2.62	\$ 161.55	\$ 28,477
Transportation Planner	310	\$ 53.17	\$ 2.62	\$ 139.30	\$ 16,393
Director of Communications	840	\$ 79.63	\$ 2.62	\$ 208.63	\$ 67,105
Sr. Communications Officer	890	\$ 66.36	\$ 2.62	\$ 173.86	\$ 58,994
Communications Officer	990	\$ 49.75	\$ 2.62	\$ 130.35	\$ 49,428
Graphic Designer	810	\$ 40.93	\$ 2.62	\$ 107.23	\$ 33,245
Total	4,790				\$ 304,108

Consultant	Hours	Base Hourly Rate	Overhead Multiplier	Fully Burdened Hourly Cost	Total
Nelson\Nygaard team labor	3,751			\$ 175.08	\$ 656,733
Nelson\Nygaard direct costs					\$ 118,267
Total	3,751				\$ 775,000

*Note: The task structure has been adjusted from the original budget as follows:

Current task	Original tasks
0. Project Management	1, 9
1. Stakeholder Engagement	2
2. Program Development	3, 4, 6, 8
3. Technical Analysis	5, 7

San Francisco County Transportation Authority Prop K/Prop AA Allocation Request Form

FY of Allocation Action:	FY2020/21
Project Name:	Downtown Congestion Pricing Study
Grant Recipient:	San Francisco County Transportation Authority

SFCTA RECOMMENDATION

Resolution Number:		Resolution Date:	
Total Prop K Requested:	\$550,000	Total Prop AA Requested:	\$0
Total Prop K Recommended:	\$550,000	Total Prop AA Recommended:	\$0

SGA Project Number:		Name:	Downtown Congestion Pricing Study
Sponsor:	San Francisco County Transportation Authority	Expiration Date:	12/31/2021
Phase:	Planning/Conceptual Engineering	Fundshare:	34.48

Cash Flow Distribution Schedule by Fiscal Year

Fund Source	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	Total
PROP K EP-143	\$400,000	\$150,000	\$0	\$0	\$0	\$550,000

Deliverables

- Quarterly progress reports (QPRs) shall contain a percent complete by task, percent complete of the overall project, a summary of outreach activities performed the quarter prior, and a list of outreach activities planned for the quarter ahead, in addition to the standard requirements for QPRs (See Standard Grant Agreement for details).
- Provide a presentation to the CAC and Board (anticipated May & June 2021, respectively) on the Final Report, including final project recommendations.

Metric	Prop K	Prop AA
Actual Leveraging - Current Request	62.5%	No Prop AA
Actual Leveraging - This Project	62.5%	No Prop AA

San Francisco County Transportation Authority Prop K/Prop AA Allocation Request Form

FY of Allocation Action:	FY2020/21
Project Name:	Downtown Congestion Pricing Study
Grant Recipient:	San Francisco County Transportation Authority

EXPENDITURE PLAN INFORMATION

Current Prop K Request:	\$550,000
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1) The requested sales tax and/or vehicle registration fee revenues will be used to supplement and under no circumstance replace existing local revenues used for transportation purposes.

Initials of sponsor staff member verifying the above statement
CDP

CONTACT INFORMATION

	Project Manager	Grants Manager
Name:	Colin Dentel-Post	Mike Pickford
Title:	Senior Transportation Planner	Senior Transportation Planner
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2019 Prop K 5-Year Project List (FY 2019/20 - FY 2023/24)
Transportation Demand Management (TDM)/Parking Management Category (EP 43)
Programming and Allocations to Date
 Pending December 15, 2020

Agency	Project Name	Phase	Status	Fiscal Year				Total
				2019/20	2020/21	2021/22	2022/23	
Carry Forward From 2014 5YPP								
SFMTA	Curb Management Strategy	PLAN/ CER	Programmed	\$200,000				\$200,000
SFMTA, Any Eligible	NTIP Placeholder	CON	Programmed	\$240,000				\$240,000
Citywide TDM								
SFE	Emergency Ride Home Program	1 CON	Allocated	\$130,000	\$120,000			\$250,000
SFMTA	SF Safe Routes to Schools Program Administration	CON	Allocated	\$200,000				\$200,000
SFMTA	SF Safe Routes to Schools Program Administration	CON	Programmed		\$240,000			\$240,000
SFMTA	Employer TDM Program - Placeholder	PLAN/ CER	Programmed	\$240,000				\$240,000
SFMTA	Employer TDM Program - Placeholder	PLAN/ CER	Programmed		\$140,000			\$140,000
SFMTA	Employer TDM Program - Placeholder	PLAN/ CER	Programmed			\$156,000		\$156,000
SFMTA	Residential TDM Program - Placeholder	1 PLAN/ CER	Programmed		\$230,000			\$230,000
SFMTA	Residential TDM Program - Placeholder	PLAN/ CER	Programmed				\$350,000	\$350,000
SFMTA	Tourist TDM Program - Placeholder	1 PLAN/ CER	Programmed	\$0				\$0
SFMTA	Tourist TDM Program - Placeholder	PLAN/ CER	Programmed			\$130,000		\$130,000
SFMTA	Tourist TDM Program - Placeholder	PLAN/ CER	Programmed				\$65,000	\$65,000
SFE	Commuter Benefits Ordinance Update	2 PLAN/ CER	Programmed	\$50,610				\$50,610
SFE	Commuter Benefits Ordinance Update	2 PLAN/ CER	Programmed			\$50,000		\$50,000
SFCTA	Mobility as a Service Pilot - Placeholder	2 ANY	Programmed	\$0				\$0
SFCTA	Emerging Mobility Pilots - Placeholder	2 ANY	Programmed	\$0				\$0
SFCTA	TSP Evaluation Tool	PLAN/ CER	Programmed	\$80,000				\$80,000
SFCTA	TSP Evaluation Tool	PLAN/ CER	Programmed			\$80,000		\$80,000
SFCTA	TSP Evaluation Tool	PLAN/ CER	Programmed				\$40,000	\$40,000
Demand and Pricing Management								
SFCTA, SFMTA	Demand & Pricing - Placeholder	2 ANY	Programmed		\$0			\$0
SFCTA	Downtown Congestion Pricing Study	2 PLAN/ CER	Pending		\$550,000			\$550,000

2019 Prop K 5-Year Project List (FY 2019/20 - FY 2023/24)
Transportation Demand Management (TDM)/Parking Management Category (EP 43)
Programming and Allocations to Date
 Pending December 15, 2020

Agency	Project Name	Phase	Status	Fiscal Year				Total
				2019/20	2020/21	2021/22	2022/23	
Modal Plans								
SFCTA	ConnectSF Modal Study Follow On	² PLAN/ CER	Programmed			\$250,000		\$250,000
Communities of Concern Access								
TBD	NTIP Placeholder	PS&E, CON	Programmed	\$500,000				\$500,000
Total Programmed in 2019 5YPP				\$1,640,610	\$1,280,000	\$666,000	\$350,000	\$105,000
Total Allocated and Pending				\$330,000	\$670,000	\$0	\$0	\$0
Total Unallocated				\$1,310,610	\$610,000	\$666,000	\$350,000	\$105,000
Total Programmed in 2019 Strategic Plan				\$1,990,610	\$930,000	\$666,000	\$350,000	\$4,041,610
Deobligated Funds				\$0	\$0	\$0	\$0	\$0
Cumulative Remaining Programming Capacity				\$350,000	\$0	\$0	\$0	\$0
Pending Allocation/Appropriation								
Board Approved Allocation/Appropriation								

FOOTNOTES:

- ¹ 5YPP amendment to fund Essential Worker Ride Home Program (Resolution 2020-056, 05/19/2020).
 Tourist TDM Program - Placeholder: Reduced from \$130,000 to \$0 in Fiscal Year 2019/20 for construction.
 Residential TDM Program - Placeholder: Reduced from \$350,000 to \$230,000 in Fiscal Year 2020/21 for construction.
 Essential Worker Ride Home Program: Project added with a total of \$250,000 in Fiscal Year 2019/20 (\$130,000) and Fiscal Year 2020/21 (\$120,000) funds for construction.
- ² 5YPP amendment to fund Downtown Congestion Pricing Study (Resolution 2021-xxx, 12/15/20).
 Mobility as a Service Pilot - Placeholder: Reduced from \$200,000 to \$0 in Fiscal Year 2019/20 for any phase.
 Emerging Mobility Pilots - Placeholder: Reduced from \$100,000 to \$0 in Fiscal Year 2019/20 for any phase.
 Demand & Pricing - Placeholder: Reduced from \$200,000 to \$0 in Fiscal Year 2020/21 for planning.
 Commuter Benefits Ordinance Update: Reduced from \$100,610 to \$50,610 in Fiscal Year 2019/20 and increased from \$0 to \$50,000 in Fiscal Year 2021/22 for planning.
 ConnectSF Modal Study Follow On: Reduced from \$300,000 to \$250,000 in Fiscal Year 2021/22 and increased from \$0 to \$50,000 in Fiscal Year 2020/21 for planning.
 ConnectSF Modal Study Follow On: Reduced from \$50,000 to \$0 in Fiscal Year 2020/21 for planning.
 Downtown Congestion Pricing Study: Project added with a total of \$550,000 in Fiscal Year 2020/21 for planning.

2019 Prop K 5-Year Project List (FY 2019/20 - FY 2023/24)
Transportation Demand Management (TDM)/Parking Management Category (EP 43)
Cash Flow (Maximum Annual Reimbursement)

Pending December 15, 2020

Project Name	Phase	Fiscal Year				Total
		2019/20	2020/21	2021/22	2022/23	
Carry Forward From 2014 5YPP						
Curb Management Strategy	PLAN/ CER	\$0	\$150,000	\$50,000		\$200,000
NTIP Placeholder	CON	\$240,000				\$240,000
Citywide TDM						
Emergency Ride Home Program	1 CON	\$65,000	\$185,000			\$250,000
SF Safe Routes to Schools Program Administration	CON	\$140,000	\$60,000			\$200,000
SF Safe Routes to Schools Program Administration	CON		\$240,000			\$240,000
Employer TDM Program - Placeholder	PLAN/ CER	\$240,000				\$240,000
Employer TDM Program - Placeholder	PLAN/ CER		\$140,000			\$140,000
Employer TDM Program - Placeholder	PLAN/ CER			\$56,000	\$50,000	\$156,000
Residential TDM Program - Placeholder	1 PLAN/ CER		\$55,000	\$175,000		\$230,000
Residential TDM Program - Placeholder	PLAN/ CER				\$175,000	\$350,000
Tourist TDM Program - Placeholder	1 PLAN/ CER	\$0	\$0			\$0
Tourist TDM Program - Placeholder	PLAN/ CER			\$65,000	\$65,000	\$130,000
Tourist TDM Program - Placeholder	PLAN/ CER				\$65,000	\$65,000
Commuter Benefits Ordinance Update	2 PLAN/ CER	\$50,610				\$50,610
Commuter Benefits Ordinance Update	2 PLAN/ CER			\$50,000		\$50,000
Mobility as a Service Pilot - Placeholder	2 ANY	\$0	\$0	\$0		\$0
Emerging Mobility Pilots - Placeholder	2 ANY	\$0	\$0			\$0
TSP Evaluation Tool	PLAN/ CER	\$40,000	\$40,000			\$80,000
TSP Evaluation Tool	PLAN/ CER			\$40,000	\$40,000	\$80,000
TSP Evaluation Tool	PLAN/ CER				\$40,000	\$40,000
Demand and Pricing Management						
Demand & Pricing - Placeholder	2 ANY		\$0	\$0		\$0
Downtown Congestion Pricing Study	2 PLAN/ CER		\$400,000	\$150,000		\$550,000

2019 Prop K 5-Year Project List (FY 2019/20 - FY 2023/24)
Transportation Demand Management (TDM)/Parking Management Category (EP 43)
Cash Flow (Maximum Annual Reimbursement)

Pending December 15, 2020

Project Name	Phase	Fiscal Year					Total
		2019/20	2020/21	2021/22	2022/23	2023/24	
Modal Plans							
ConnectSF Modal Study Follow On	2 PLAN/ CER			\$50,000	\$100,000	\$100,000	\$250,000
Communities of Concern Access							
NTIP Placeholder	PS&E, CON	\$250,000	\$250,000				\$500,000
Cash Flow Programmed in 2019 5YPP							
		\$1,025,610	\$1,520,000	\$636,000	\$430,000	\$430,000	\$4,041,610
Total Cash Flow Allocated and Pending		\$205,000	\$645,000	\$150,000	\$0	\$0	\$1,000,000
Total Cash Flow Unallocated		\$820,610	\$875,000	\$486,000	\$430,000	\$430,000	\$3,041,610
Total Cash Flow in 2019 Strategic Plan							
		\$1,360,610	\$1,185,000	\$636,000	\$430,000	\$430,000	\$4,041,610
Deobligated Funds		\$0	\$0	\$0	\$0	\$0	\$0
Cumulative Remaining Cash Flow Capacity		\$335,000	\$0	\$0	\$0	\$0	\$0
Pending Allocation/Appropriation							
Board Approved Allocation/Appropriation							