



AGENDA

San Francisco County Transportation Authority Meeting Notice

Date: Tuesday, April 13, 2021; 10:00 a.m.

Location: Watch SF Cable Channel 26

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PUBLIC COMMENT CALL-IN: 1 (415) 655-0001; Access Code: 187 006 5630 # #

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Commissioners: Mandelman (Chair), Peskin (Vice Chair), Chan, Haney, Mar, Melgar, Preston, Ronen, Safai, Stefani, and Walton

Clerk: Britney Milton

Remote Access to Information and Participation:

In accordance with Governor Gavin Newsom's statewide order for all residents to "Stay at Home" - and the numerous local and state proclamations, orders and supplemental directions - aggressive directives have been issued to slow down and reduce the spread of the COVID-19 disease. Pursuant to the lifted restrictions on video conferencing and teleconferencing, the Transportation Authority Board and Committee meetings will be convened remotely and allow for remote public comment. Members of the public are encouraged to watch SF Cable Channel 26 or visit the SFGovTV website (www.sfgovtv.org) to stream the live meetings or watch them on demand. If you want to ensure your comment on any item on the agenda is received by the Board in advance of the meeting, please send an email to clerk@sfcta.org by 8 a.m. on Tuesday, April 13, or call (415) 522-4800. Written public comment may be submitted prior to the meeting by emailing the Clerk of the Transportation Authority at clerk@sfcta.org or sending written comments to Clerk of the Transportation Authority, 1455 Market Street, 22nd Floor, San Francisco, CA 94103. Written comments received by 8 a.m. on the day of the meeting will be distributed to Board members before the meeting begins.

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| 12. | Introduction of New Items - INFORMATION

During this segment of the meeting, Commissioners may make comments on items not specifically listed above or introduce or request items for future consideration. |
| 13. | Public Comment |
| 14. | Adjournment |



*Additional Materials

Items considered for final approval by the Board shall be noticed as such with **[Final Approval]** preceding the item title.

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DRAFT MINUTES

Citizens Advisory Committee

Wednesday, March 24, 2021

1. Call to Order

Chair Larson called the meeting to order at 6:01 p.m.

Present at Roll: Rosa Chen, Robert Gower, John Larson, Jerry Levine, Stephanie Liu, Peter Tannen, and Danielle Thoe (7)

Absent at Roll: Nancy Buffum, (entered during item 3), David Klein, Kevin Ortiz, Sophia Tupuola (4)

2. Chair's Report - INFORMATION

Chair Larson reported that at the most recent San Francisco County Transportation Authority (Transportation Authority) Board meeting, the Board reappointed Sophia Tupuola to the Citizens Advisory Committee (CAC) District 10 seat, and appointed Rosa Chen to the District 3 seat. He welcomed Rosa to the committee and invited her to say a few remarks.

Rosa Chen thanked Chair Larson and said that she is excited to be a part of the CAC. She said she was born and raised in Chinatown and briefly described some of her experience working on transportation issues and projects with Chinatown Trip and with the community.

Chair Larson added that he was at the Board meeting when Rosa's nomination was approved on its first reading and said that he is glad they have gained another valuable member who is well versed in the issues that District 3 is currently facing.

Chair Larson reported that CAC members were provided the link to the Executive Director's Report that was presented a day prior at the Transportation Authority Board meeting. He highlighted the District 4 Mobility Study Townhall on March 27 at 10 a.m. and shared that the Transportation Authority staff would be joining Commissioner Mar and city staff for a virtual open house to share the preliminary findings from the evaluation of the alternative long-term configurations for the Great Highway. He said they would also present concepts to improve walking, biking, and transit in the Outer Sunset and Parkside neighborhoods. He encouraged interested parties to register on the sfcta.org website.

With respect to the major capital updates, he shared that staff had the Van Ness Bus Rapid Transit, Pennsylvania Avenue Alignment, and Fare Free Muni items on deck to be agendaized for the upcoming CAC meetings.

There was no public comment.



Consent Agenda

3. **Approve the Minutes of the February 24, 2021 Meeting - ACTION***
4. **Adopt a Motion of Support to Approve Up to \$3,012,914 in San Francisco's Estimated Fiscal Year 2021/22 State Transit Assistance County Block Grant Funds for Paratransit - ACTION***
5. **Adopt a Motion of Support to Adopt a Position of Support for AB 550 (Chiu) - ACTION***
6. **Adopt a Motion of Support to Award a Two-Year Professional Services Contract to WMH Corporation, in an Amount Not to Exceed \$1,700,000, for Engineering and Environmental Consulting Services for the U.S. 101/I-280 Managed Lanes and Bus Project - ACTION***

With respect to Item #5, Danielle Thoe voiced her support for Assembly Bill (AB) 550 (Chiu) and said she is excited that they are getting to automatic speed enforcement and highlighted the SFMTA's re-rolling out of enforcement of car-free Market Street. She said it takes time and money for people to physically be on the streets enforcing, and said she hopes to see this [AB 550] lead to other creative solutions for these critical projects.

There was no public comment.

Jerry Levine moved to approve the consent agenda, seconded by Danielle Thoe.

The consent agenda was approved by the following vote:

Ayes: Chen, Gower, Larson, Levine, Liu, Tannen, Thoe (7)

Abstain: Buffum (1)

Absent: Klein, Ortiz, Tupuola (3)

End of Consent Agenda

7. **Adopt a Motion of Support to Allocate \$1,200,000 in Prop K Funds, with Conditions for Three Requests - ACTION***

Anna LaForte, Deputy Director for Policy and Programming presented the item per the staff memorandum.

Robert Gower asked whether the timing of the Traffic Calming Removal and Replacement request was appropriate, and whether it was a better use of resources than installations of new traffic calming devices.

Damon Curtis, with the San Francisco Municipal Transportation Authority (SFMTA), answered that in most cases the handful of speed bumps recommended for replacement each year were in bad condition and no longer functional. He said replacing them would provide functional traffic calming devices where they had already been approved and established. Mr. Curtis said the replacement program was separate from SFMTA's application-based program, so proposed replacement locations were not in competition with requests for new devices.

Chair Larson requested that the CAC receive a presentation on the quick-build improvements proposed for the Lake Merced Quick Build project when the planning work for that project was complete.



Anna LaForte said staff would alert the CAC about public events, community meetings and the proposed virtual public hearing associated with the project. She also anticipated that SFMTA would request Prop K funds for the construction phase, and the request would include details of the proposed improvements.

Peter Tannen asked if locations of traffic calming devices to be designed and constructed as part of the Vision Zero Proactive Traffic Calming - Visitacion Valley and Portola Neighborhoods would be prioritized from the list on page 21 of the enclosure.

Anna LaForte answered affirmatively, adding that those options arose from planning work performed by the Department of Public Health.

During public comment Roland Lebrun asked why consideration of the policy-level amendment to the Prop K Downtown Extension - Phasing and Partial Design grant bypassed the CAC. He also requested that staff implement a better virtual platform for CAC meetings.

Chair Larson motioned to approve the item, seconded by Peter Tannen.

The motion was approved by the following vote:

Ayes: Buffum, Chen, Gower, Larson, Levine, Liu, Tannen, Thoe (8)

Nays: (0)

Absent: Klein, Ortiz, Tupuola (3)

8. Adopt a Motion of Support to Amend the Adopted Fiscal Year 2020/21 Budget to Decrease Revenues by \$16.8 Million, Decrease Expenditures by \$18.6 Million and Decrease Other Financing Sources by \$50.0 Million for a Total Net Decrease in Fund Balance of \$48.2 Million - ACTION*

Lily Yu, Principal Management Analyst presented the item.

Danielle Thoe said it looked like most of the projects with delayed reimbursements or delayed delivery seemed to be on the bigger scale of longer-term projects and she understood that the changes in funds proposed were not significant. With respect to the TNC Tax quick build projects, Ms. Thoe noted staff's explanation that SFMTA would be using other funds first, and asked if there would be any impact on the number of quick builds they would be able to deliver this year, noting that the premise behind the quick build program is to get things done quickly.

Anna LaForte, Deputy Director for Policy and Programming, said that project delivery is not impacted and all that is changing is which fund source is being billed first.

Peter Tannen, noted that on page 53, the memo mentions that the SFMTA LRV procurements have been delayed due to the impacts of COVID, which made sense. Mr. Tannen said this reminded him that there had been complaints about seat heights and configuration, lack of forward-facing seats, etc. and he asked if there had been any changes to the procurement due to this.

Ms. Lombardo added that her recollection was that the SFMTA had decided to make some changes to the seat configuration and that staff would follow up with the SFMTA to confirm.

Chair Larson said he expected the budget would be disrupted due to the pandemic but noted that the 13% revision downward in sales tax revenues was smaller than he anticipated. Further, since some work has slowed, reducing expenditures, things



seemed to balance out a little in the budget.

Chief Deputy Maria Lombardo said part of the reason there is a minimal change right now is coming into the year the agency was conservative and lowered sales tax revenues. Ms. Lombardo said that year over year compared to pre-pandemic, sales tax revenues were down about 30%.

Ms. Yu confirmed that and added that actuals in the prior year came in at \$99 million and this year's budget reduced anticipated sales tax revenues to \$93 million. Pre-pandemic, Ms. Yu said revenues were in the \$110-115 million range.

Chair Larson said he appreciated the good staff planning.

During public comment, Roland Lebrun said that San Francisco sales tax revenues are down about 30% which is better than the forecasted 35%. In contrast, he said that Santa Clara is only county in the Bay Area that is up 7% year over year over last year. Mr. Lebrun continued by noting that at the Metropolitan Transportation Commission (MTC) Programming and Allocation Committee, it shows that VTA has a \$96.8 million surplus and VTA just got another \$39 million this morning. Mr. Lebrun asked what happened to equity, noting that the federal relief funds were supposed to be compensation for both the drop in sales tax and fare revenue. He said the money should be going to San Francisco and other places that deserve it.

Chair Larson asked staff to look into Mr. Lebrun's comment to see if MTC is addressing equity in the distribution of the federal relief funds.

Ms. Lombardo said she said MTC has partially addressed equity. She said staff would follow up with either a memo to the CAC or agendaize the topic, noting the distribution of funds was a bit complicated for an on-the-spot answer.

Danielle Thoe motioned to approve the item, seconded by Robert Gower.

The motion was approved by the following vote:

Ayes: Buffum, Chen, Gower, Larson, Levine, Liu, Tannen, Thoe (8)

Nays: (0)

Absent: Klein, Ortiz, Tupuola (3)

9. Adopt a Motion of Support to Approve the Schedule and Process for Development of a New Expenditure Plan for Reauthorization of the Local Sales Tax for Transportation and Establish an Expenditure Plan Advisory Committee Structure - ACTION*

Michelle Beaulieu, Principal Transportation Planner, presented the item.

Jerry Levine asked if reauthorization would fare better at a general election in November rather than in June.

Ms. Beaulieu responded that the process includes a voter opinion survey before going to the ballot which would help inform the recommendation for timing to the Board.

Maria Lombardo, Chief Deputy Director, added that it may seem easier during a general election to reach the required 2/3 vote threshold, but that another consideration is how many and what other measures, particularly other revenue measures, are also eyeing the same ballot.

Chair Larson asked for clarification on the timeline of the current Prop K Expenditure Plan.



Ms. Beaulieu said the current Prop K Expenditure Plan is a 30-year plan [extending to Fiscal Year 2033/34], and if voters approve a new plan, it would supersede the current one.

Chair Larson asked why a new plan is being considered now.

Ms. Beaulieu responded that the Transportation Authority is planning to go back to the voters now because most of the major capital projects are under construction or complete and this would allow a chance to reset the Expenditure Plan and include new priorities such as some of the ideas that emerge through ongoing planning work from ConnectSF and the San Francisco Transportation Plan or other efforts. She added that some on-going programs are also running out of funds.

During public comment, Edward Mason commented that the staff memo included maintaining funding for ongoing programs and asked if there was potential for carryover or if the new Expenditure Plan would be a blank slate. He also asked if money would be given to San Francisco Public Works. He said that under street and traffic safety, Prop K includes street resurfacing, and asked if that meant curb-to-curb or if it included encroaching onto sidewalks for sidewalk repair. He said clarification was needed about what this program should fund. He said there needs to be a discussion about whether or not to fund Public Works and if it should be funded through the General Fund instead, noting projects on sidewalks are their responsibility and they should not come to the Transportation Authority for funding. He said he would like clarification to avoid unintended consequences.

Chair Larson commented that these were interesting questions and encouraged interested community members to apply for the Expenditure Plan Advisory Committee where issues could be brought up and elaborated on.

Jerry Levine motioned to approve the item, seconded by Nancy Buffum.

The motion was approved by the following vote:

Ayes: Buffum, Chen, Gower, Larson, Levine, Liu, Tannen, Thoe (8)

Nays: (0)

Absent: Klein, Ortiz, Tupuola (3)

10. Adopt a Motion of Support to Amend the San Francisco Municipal Transportation Agency's Business Relocation Transportation Demand Management Project, with Conditions - ACTION*

Mike Pickford, Senior Transportation Planner presented the item.

Danielle Thoe raised question surrounding the COVID recovery and asked if these kinds of efforts needed to be tied to a particular employer, being that there is going to be plenty of people who will start commuting back-and-forth, and in some cases some employers may not qualify for this. She said she is concerned about the influx of traffic for people who previously drove into the city as well as people who may not be so inclined to take transit. She asked if there was an opportunity to reach out to employees directly who might not have an employer interested in participating or that does not meet the requirements for employer size.

Crysta Highfield with SFMTA replied that they have a set of target businesses to maximize impact, but said the SFMTA would welcome businesses that reach out to them and that the SFMTA would make it as easy as possible for them to reach out even



if they are outside of their target employer size range. She added that they will give businesses outside of their target the same support as any business on their initial prioritization list which is really just for proactive outreach. She said SFMTA's approach is intended to be flexible based on what they are learning so they can modify their approach as needed.

Chair Larson motioned to approve the item, seconded by Stephanie Liu.

The motion was approved by the following vote:

Ayes: Buffum, Chen, Gower, Larson, Levine, Liu, Tannen, Thoe (8)

Nays: (0)

Absent: Klein, Ortiz, Tupuola (3)

11. San Francisco Municipal Transportation Agency Transportation Recovery Plan - INFORMATION*

Julie Kirschbaum, Director of Transit and Tom Maguire, Director of Streets with SMFTA presented the item.

Peter Tannen pointed out that on page 90, with respect to the bar graphs, he was surprised that the fares in 2021 were at such small portions compared to 2020.

Ms. Kirschbaum replied that the revenue was not coming back commensurate with their ridership and in fact they have seen a very stable trend of fares remaining down about 90%. She said that it was the kind of thing that when they get to the Spring they can reevaluate and if the fares have recovered, they will have more money to invest. She added that because they have not seen that trend, despite a steady increase in ridership and in service, the finance folks were fairly conservative in that area.

Mr. Tannen asked what the disconnect was between ridership and fare for 2021.

Ms. Kirschbaum replied that they need to do a little more research to understand it, but she speculated that the demographics of their riders have changed, and people that are more likely to qualify for Muni's free and subsidized programs are riding the system in a higher proportion right now. She said a lot of people are either staying home or taking other modes like driving and have been exercising their choice. She added that SFMTA is also bringing back fare inspection and trying to bring it back in a way that is respectful of the current national dialogue around policing and enforcement.

Jerry Levine thanked SFMTA staff for their presentation and said that he had a number of questions, but they did a great job answering most of them. He said that he thinks it is important once the new lines come on again that they initiate a public information campaign to inform the public. He said that the users have the right to know when the service becomes available, but if you do not give people sufficient advanced notice, they cannot get their schedules adjusted in time. He added that this is critical to getting success right off the bat. He also raised a concern with witnessing 80% of bicycle riders riding both on the sidewalk and bike lanes while riding in and out between pedestrians on The Embarcadero, and he asked why it is allowable for the bikes to be on the sidewalk.

Mr. Maguire replied that the SFMTA's approach has been primarily to build better and better facilities within the roadways so that as many cyclists as possible, especially those who have the confidence to ride on the street, do so. He said at this point from Harrison Street up to the Ferry Building, they now have a protected bike lane on the



street and its one of the more densely traveled, so they are trying to design improvements to shift the bicyclists onto the street as possible while they also work with the Port to continue that strategy further south towards the ballpark. He said it is tricky further south because they do not want to compromise the Muni right of way or move the lanes around too much. Mr. Maguire acknowledged the jurisdiction issue with the Port but reiterated their strategy to provide safe designs that draw cyclists to use the street.

Mr. Levine said it is frustrating to witness easily 80% of bike riders were on the sidewalk.

Robert Gower thanked the SFMTA staff for a concise yet informative presentation. He made a comment as it relates to the Embarcadero stating that use of the sidewalk is really the only route for cyclists to access the Third Street bridge to head down south towards the Dogpatch area, without having to deal with the King Street traffic, acknowledging the tension there.

With respect to the Muni rail designs, Mr. Gower asked for clarification on the J Church not entering into to the Market Street subway when the subway system reopens. He asked what the rationale was and what will be done to ensure passengers can safely transfer, particularly when they are heading outbound. He pointed out that the map shows that riders would be transferring from the N Judah to the J Church above ground, which is a bit of a distance and he also inquired how riders who need to use a ramp would transfer, being that there is a ramp for the N Judah but not a service ramp for the J Church line.

Ms. Kirschbaum responded that the reason for creating the transfer points rather than putting everything into the subway has to do with a challenge that they were seeing pre-COVID. She said they were seeing a lot of routine congestion in the subway and were running many more trains than they could reliably accommodate. She said they really see a need to run fewer trains that are longer so that they have more consistent service and service that people can rely on. She added that they were seeing slower travel times and more variable travel times as a result of this congestion and particularly people were getting stuck on the train between Forest Hill and West Portal for long periods of time on the way home, and coming in, particularly between Montgomery and Embarcadero, being at the station but not able to get off the train. She said SFMTA focused on the J church in particular because it is a one car train and SFMTA thought would it work better outside of the subway. She said J line customers have the option of taking the N Judah and walking down, but she believes most will take the subway service to the Church station and transfer there, where the raised platforms are right there to make a connect. Ms. Kirschbaum said that as demand increases, they will fold in more shuttles to keep up with the subway demand and, hopefully, soon they will have 3 car trains in the subway to carry that demand.

Mr. Gower replied that he hopes that as the as ridership continues to increase, the J Church passengers are actually able to board those trains, which get really crowded by the time they get to the Van Ness area. He said there is a lot of concern in District 11 around these changes.

Mr. Gower also directed a question towards Mr. Maguire in regard to the bicycle network. He said in the map presented, he noticed there were hazard markers placed south of Glen Park where San Jose has a bike exit and then complicated ways to continue the journey. Mr. Gower what level of community involvement they were undertaking to address those areas of concern.



Mr. Maguire replied that right now their focus is on building out as much of the slow street network with temporary materials and starting to work with the SFMTA Board to legislate some of them as permanent. He said the hazards and some of the gaps in the map are areas they want to fix as they recover from the pandemic. He added that they are in close consultation with communities in a couple of neighborhoods including the Valencia Street corridor, where they are working very closely to upgrade the bike lane. He said they are very open to having conversations with folks who are affected by the admittedly imperfect access points to the San Jose bike lane. He said they have been trying to make some upgrades there in response to some crashes that have taken place, including some safe hit posts that they plan to install this summer, but their focus of their outreach is on the slow street network right now. Mr. Maguire said they will continue to work with all stakeholders interested in bike lanes to fix hot spots as they come up.

Chair Larson said he is interested in the hilltop connection in District 7, between Forest Hill and Glen Park, and said he is interested to know the combination of service in the 36 and 52 and how they are being paired.

Ms. Kirschbaum responded that with using three buses which was kind of all they could squeeze out in in the short term, they are basically creating two loops. She said that the 36 and 52 on Diamond Heights will run as one route and they are still discussing whether to give it a new number or whether they just call it the 36/52. She said she is happy to send the draft map through the Transportation Authority staff for distribution to the CAC. She said it essentially will work as one route and provide some improved connectivity that does not currently exist.

Chair Larson said he is happy to hear that because there was kind of a big gap when they lost a lot of their main neighborhood bus services. He asked about the reopening of Twin Peaks Boulevard to cars and asked why it had been reopened noting that while it is a tourist/recreational type destination there doesn't seem to be much through traffic. He also asked if there would be further discussion similar to what is happening on the Great Highway closure.

Mr. Maguire replied that the SFMTA Board in early March did make the decision to reopen the Twin Peaks Boulevard to Portola Drive, but to permanently close the connection to Burnet Avenue. He said that was a decision made to create as much car-free space as possible on top of the hill, expanding the footprint of the figure 8 that they made car-free a couple years ago, but it does preserve access for people whose only way to get to the top of Twin Peaks is by car, including people with disabilities. Mr. Maguire added that it was an important compromise that they hashed out in a public process with residents and with citywide stakeholders, and that it was a theme that was going to permeate their discussions about the Great Highway and Golden Gate Park as well. He said he is thrilled to have all that car free space along the beach and park, and he wants to find ways to preserve those routes while also making sure that they address the accessibility issues which are related to people with disabilities who are unable to bike at the park and also people who do not have a good transit connection or their travel patterns make it impossible to get there without driving. He said they are not closing the park to people who drive there as there are 5000 parking spaces in Golden Gate Park, and they want to make it equitable and accessible for everyone.

Nancy Buffum raised a question on increased recreational use of Ocean Beach and the Great Highway and the increased potential use of public transit. She said she is concerned about the N Judah and the L-Taraval and local buses being able to take on



the burden of all the people who are now coming to these areas and wants to know if that is being taken into consideration in SFMTA's plans for restoring service to the western edge.

Ms. Kirschbaum said that is one of the many reasons why they will be bringing back the 18 route in August, and why they are anxious to see the N Judah, which is the main bus substitute rail line where they are experiencing crowding, return to rail. She said they are looking at a multi-modal, walking, biking, transit, as well as driving access to this new recreational opportunity.

Ms. Buffum added that before the pandemic, the weekend use of the N Judah to get to Ocean Beach was really high, and now the traffic that the neighbors are complaining about is actually weekend traffic from people coming to recreate.

Chair Larson thanked SFMTA staff for their presentation and time.

During public comment, Hayden Miller, a San Francisco high school student, said he is very concerned with service restoration, especially as schools reopen. He said that 85% of service is not going to be able to get more than 50% of San Francisco Unified School District (SFUSD) high school students who depend on Muni to get the school, to get there safely and on time. He said before the pandemic at 100% service, there was not enough buses to get everybody to school. Mr. Miller said they need to look at short term fixes like reducing the amount of stops that the 29 Sunset makes, saying a stop on every block on Sunset is unnecessary, and look at bringing back more light rail lines. He said they have 40 rail operators who are getting sent home early, as well as other operators doing DSW work for other city departments, but the city needs Muni service. He said the restoration will be frustrating for the public, a mess when school opens, and as a result, some may not return to using Muni because of it.

Edward Mason said that the overriding philosophy should be a trust in transit. He suggested using the transit vehicle destination signs for advertising the reopening (e.g. welcome back) and advertising Muni hiring. With respect to J church, he said the original contract with Alcatel called for 100 train sets an hour through the subway, which he said was never achieved and yet, Muni accepted it. He said now there will be 30 train sets an hour going through the subway according to some presentations he has seen. Mr. Mason said it is so frustrated with the J being truncated until there is a new train control system in place. Mr. Mason reiterated the need to use the Muni destination signs for everyone to see, not to Muni passengers, to encourage folks to try transit.

Luke Bornheimer, a father, resident of District 8, and one of the organizers of the car-free JFK rally this past weekend. He thanked Directors Kirschbaum and Maguire for their presentation and work. He urged the CAC to support slow streets and the continuation and permanency of car-free JFK and the Great Highway. He said it has been one of the most positive things that came out of 2020, noting that it's good to see a diverse crowd as well as see what it does positively for public space and land. He acknowledged concerns about access for persons with disabilities, low-income people and people from the southern part of the city. He urged the CAC to support slow streets and car-free JFK and also increasing transit service and reliability and educating the public about all the 2000+ free parking spaces in the park already as well as along Fulton and Lincoln. He said the coalition is working to keep JFK car-free and also to help improve access for low income persons and persons with disabilities.

Chair encouraged public commenters to apply to one of the advisory committees to



get more voices, especially young and diverse voices, as part of the conversation.

12. Connect SF Transit Strategy Update - INFORMATION*

Hugh Louch, Deputy Director for Planning, and Kansai Uchida, Principal Planner at SFMTA, delivered the presentation.

Chair Larson noted this topic will be back before the CAC in the future.

Mr. Louch indicated that CAC members would be provided information about upcoming outreach meetings.

During public comment, Edward Mason expressed that even with the new train control system, the long-term plan keeps the J line truncated which is a disservice to people with disabilities who will have difficulty transferring from the J line stop at Market and Church to the subway since the transfer requires them to travel six lanes across Market Street to access the elevator. He suggested that the J line should be returned to the subway once a new automatic train control system is installed.

Other Items

13. Introduction of New Business - INFORMATION*

There were no new items introduced.

14. Public Comment

During public comment Roland Lebrun reiterated requests for presentations on the Pennsylvania Avenue Extension and Downtown Rail Extension. He said there are a lot of unaddressed issues that need to be presented before asking for more money for these projects.

Edward Mason said that Muni has embarked on the electric bus program, whereas Santa Clara Valley Transportation Authority (SFVTA) and SamTrans already have electric busses along with San Francisco international Airport (SFO). He said that in light of all the requirements for electricity he suggested a hydrogen fuel cell back up plan.

15. Adjournment

The meeting was adjourned at 8:46 p.m.



DRAFT MINUTES

San Francisco County Transportation Authority

Tuesday, March 23, 2021

1. Roll Call

Chair Mandelman called the meeting to order at 10:02 a.m.

Present at Roll Call: Commissioners, Chan, Haney, Mandelman, Mar, Melgar, Peskin, Preston, Ronen, Safai, Stefani, and Walton (11)

Absent at Roll Call: (0)

2. Chair's Report - INFORMATION

Chair Mandelman reported that over the past weeks and months there has been a surge of violent attacks against Asian Americans in the city and across the country. He extended his condolences to the families of those lost to violence and those hurt by the attacks in Atlanta and San Francisco. He said that the Board stands with the Mayor and community leaders across the city for the collective calls for an immediate end to the violence against Asian American Pacific Islanders (APIs) and all members of the community. He expressed that everyone deserves to feel safe on their streets and in the city. At times like these, he said, it is important and healing for people to be able to gather in the public squares and open spaces to remember victims and confront and denounce hate. He shared that the past weekend, many attended vigils, marches, and community events at Portsmouth Square, in the Castro, and along Market Street to Chinatown and heard messages of solidarity and support.

Chair Mandelman also reported that this month marked the anniversary of the start of shelter-in-place public health orders. He said it has been and continues to be a trying time for so many community members and businesses. He said they are continuing to work on ways to support essential commuters and travelers and want to belatedly thank the San Francisco Municipal Transportation Agency (SFMTA) and regional operators, as last Thursday the 18th was Transit Operator and Worker Appreciation Day. During the pandemic, he said, they have provided safe, reliable transportation for their riders as they travel to and from work, medical appointments, and other essential trips. He said he looks forward to SFMTA's presentation on their transportation recovery plans later on the agenda. He added that with more and more people getting vaccinated, they are beginning to re-open the economy, and restoring transit service will be key to that recovery.

He said that the economic recovery got a major boost with the passage of the third major COVID relief bill in Washington. He thanked Speaker Pelosi, the entire Federal delegation, and President Biden for passing the American Recovery Act, which included \$1.6 billion in lifeline funds for Bay Area transit operators and around \$3.1 billion for local Bay Area governments. He also added that transit projects that received funding in the bill include Caltrain Electrification (\$52 million), Central Subway (\$23 million) and BART Transbay Core Capacity program (\$87 million). He



said that they were very grateful for the essential support which would help backfill project funds that were impacted by the pandemic and enable them to avoid layoffs and re-grow the economy.

Lastly, Chair Mandelman recognized the passing of Anne Halsted, who was honored last week at the TIMMA Committee and at the Board of Supervisors. He said as Commissioner Ronen and Vice Chair Peskin recalled in their tributes, Anne served the city for over 5 decades in numerous capacities, including on the Treasure Island Development Authority and for the past 12 years on the Metropolitan Transportation Commission (MTC), as a San Francisco Bay Conservation and Development Commission representative. He added that she was a strong voice for regional collaboration, climate resilience and sustainable growth. He expressed condolences to her loved ones and legions of city and regional colleagues who benefited from her leadership, mentorship and service and added that he would be adjourning the meeting in her honor.

There was no public comment.

3. Executive Director's Report - INFORMATION

Tilly Chang, Executive Director, presented the Executive Director's Report.

During public comment, Roland Lebrun shared that Union Pacific Railroad (UP) has agreed to operate diesel freight under the wye on the Peninsula which has profound implications for achieving GHG targets. He said between San Jose and Gilroy they will no longer need a third electrified track just for freight. He added that moving forward, UP will be sharing track with electrified rail like they do elsewhere. Mr. Lebrun said Pacheco Pass was the wrong alignment and they need to focus more on Fresno. He said to look for a memo from the former CEO of the California High Speed Rail Authority (January 1999, Item #7) which shows there is another alignment that does not require tunneling. He said to ask Chief Executive Brian Kelley to restore all board agendas and memos prior to January 2018. Lastly, Mr. Lebrun said the Caltrain board should understand the relationship between Bay Area Rapid Transit (BART) and Capital Corridor to inform Caltrain governance discussions.

4. Approve the Minutes of the March 9, 2021 Meeting - ACTION

There was no public comment.

Vice Chair Peskin moved to approve the minutes, seconded by Commissioner Ronen.

The minutes were approved without objection by the following vote:

Ayes: Commissioners Chan, Haney, Mandelman, Mar, Melgar, Preston, Peskin, Ronen, Safai, Stefani, and Walton (11)

Absent: (0)

Consent Agenda

- 5. [Final Approval] Appoint Rosa Chen and Sophia Tupuola to the Citizens Advisory Committee - ACTION**
- 6. [Final Approval] State and Federal Legislation Update - ACTION**



7. [Final Approval] Allocate \$945,258 in Prop K Funds, with Conditions, and \$2,020,000 in Prop AA Funds for Four Requests - ACTION
8. [Final Approval] Support the City and County of San Francisco's Project Nominations for \$6,359,000 in Senate Bill 1 Local Partnership Program Formulaic Program Funds - ACTION
9. [Final Approval] Approve the Transportation Authority's Project Nominations for \$10,444,302 from the Safe and Seamless Mobility Quick-Strike Program - ACTION
10. [Final Approval] Amend the Downtown Rail Extension - Phasing and Partial 15% Design Project Scope, Schedule, and Budget and Release \$6,210,000 in Previously Allocated Prop K Sales Tax Funds, with Conditions, for Accelerated Project Development - ACTION

There was no public comment.

Vice Chair Peskin moved to approve the consent agenda, seconded by Commissioner Ronen.

The consent agenda was approved without objection by the following vote:

Ayes: Commissioners Chan, Haney, Mandelman, Mar, Melgar, Preston, Peskin, Ronen, Safai, Stefani, and Walton (11)

Absent: (0)

End of Consent Agenda

11. San Francisco Municipal Transportation Agency Transportation Recovery Plan - INFORMATION

Jeffrey Tumlin, Director of Transportation, Julie Kirschbaum, Director of Transit, and Tom Maguire, Director of Streets Division with SFMTA presented the item.

Commissioner Chan thanked Chair Mandelman for adding this item to the agenda which she requested in February. She said that as they reopen and restart the economy, the westside communities need to see a concrete plan to show it is safe to get from one place to another to ensure they are truly a transit first city. She said they need to make some of the temporary improvements permanent for transit speed and safety, noting that some of the improvements like the Great Highway and Golden Gate Park road closures, slow streets and shared spaces call for improved safety and efficiency. She acknowledged that will likely hear through public comment today that there are a wide range of opinions on these topics. Commissioner Chan continued by saying that she and likely her colleagues Commissioners Mar and Melgar have heard that they cannot go back to the way it was. She said there is a unique opportunity to rethink streetscape and street designs and that through good planning, they can keep neighborhoods walkable, bikeable and connected.

Commissioner Chan said that the Great Highway had 20,000 cars daily, but more than 60,000 were traveling downtown using transit. She stated that more people were working from home and on a hybrid work schedule, which has changed how people travel around the city. She said she has asked SFMTA how they track data and travel patterns and to develop plans to meet those travel needs.



Director Tumlin said that he understands the necessity to keep the best of what they have done, and also recognizes that travel patterns have changed. He emphasize that improvements were done quickly, expressing that some should stick around while others should be let go. Director Tumlin said they need to make adjustments along the way as they are a long way from full recovery at the SFMTA.

Commissioner Chan pointed out that current ridership data doesn't include lines that do not have service.

Director Kirschbaum responded that is why they are also tracking coverage. She said they think they can come back to 98% coverage by August when school returns. She said as they add back routes it reduces their ability to address crowding, but also provides important coverage for those that currently don't have transit service. She said they may not restore service exactly the way it was and that it may be more about making connections to higher frequency routes, but they will have the data to help them make decisions.

Commissioner Preston thanked Commissioner Chan for calling the hearing. He also acknowledged SFMTA's staff and line workers for their hard work. He said that he recognizes the visionary work and the activation of outdoor spaces. He added that he encourages all to view these as successful pilots and to continue to push the envelope on expanding Slow Streets to help achieve Vision Zero while prioritizing non-car use of public space. With respect to Muni, he followed up on the level of service and said he understands the previous lack of service was caused by a lack of Personal Protective Equipment (PPE) but has since been addressed. He asked why the level remains at 70% and not 100%.

Ms. Kirschbaum replied that operators are one of dozens of positions needed to run the transit system. She said they had a 15% vacancy coming into COVID, which compounded over the last year. She added that they also lost efficiency noting operators can't meet buses in the street, as they have to change operators at the division since vehicles are cleaned first.

Commissioner Preston asked what the current reserves of SFMTA were.

Director Tumlin replied that he did not have that answer but would report back once he did.

Commissioner Preston asked if they were allocating the reserves in order to increase, the service restoration to 85% and beyond.

Director Tumlin replied that SFMTA's key sources of revenue, particularly parking and transit fares, have been significantly depressed. He said their plan for using the reserves now that they have the benefit of some one time federal relief money, is to use the reserves as a backstop if they are unable to get onto the 2022 ballot for a new ongoing revenue measure or if the measure fails at the ballot. He said they need to save their reserves to avoid laying off staff if they are unsuccessful in restoring ongoing operating revenue that is necessary for them to get to full service restoration. He added that they don't want to gamble reserves and risk staff positions if they are not successful.

Commissioner Preston noted that under the recovery plan, they are planning less than 100% restoration by Fiscal Year 2022 with a policy decision to not use reserve to further increase the restoration of service.



Ms. Kirschbaum clarified that there were two reasons why they will be at 85% service levels by the end of the year. She said one is the risk of not having stable funding, and second is not having the time, ability to hire, and ability to create new civil service lists quickly enough. She said they just got authority from the Department of Public Health and all of their hiring has a long lead time. She said they looked at how quickly they could hire up, and other staff looked at what service level they could sustain. She added they will need all of that lead time to deliver that 85% service level. Ms. Kirschbaum said that they can have the policy decision about what level of risk is appropriate and what the ballot is looking like by the Spring. She emphasized the need for time to hire and train personnel.

Director Tumlin confirmed that SFMTA's reserves were a little over \$130 million which translates to 10% of their operating budget. He said it was less than the gap that is necessary to get full service.

Commissioner Preston asked what the price tag was for the gap.

Director Tumlin replied that it is about 15% of their budget.

Commissioner Preston questioned if the SFMTA had made any decisions to permanently abandon any lines.

Ms. Kirschbaum replied that they have not made any such decisions, and she emphasized that the path they could take from 70% to 85% service and 85% to 100% service, presented a lot of choices about how to restore the service and when.

Commissioner Preston said that a route abandonment would require action by the Board of Supervisors. He added that a long-term suspension is 2 years and asked if there is a threshold at which the SFMTA would come to Board of Supervisors or was it only necessary if the line was suspended indefinitely.

Ms. Kirschbaum replied that that was a matter they would have to get legal guidance on, and then provide follow up.

With respect to lines 6, 21 and 31, Commissioner Preston raised the question of when they would be returning.

Ms. Kirschbaum responded that they anticipate that the hilltop portion of 6 Parnassus would return back in time for the August school restart. She said it is an area where they have heard about service gaps, and in the Fall, they will have more discussions as it relates to the 85% restoration, and what it looks like.

Commissioner Preston concluded that he wanted to emphasize those lines, but to also recognize that the 31 line, from an equity lens, runs through the heart of the Fillmore where there are high concentrations of low-income persons, African Americans, and seniors, as well as being one of the areas with the lowest car ownership rates in the city. He said the neighborhood is very dependent on the 31 line and to some extent the 21 and is very affected by its absence. He thanked the SFMTA staff in advance for the return of the N Judah in May.

Commissioner Melgar thanked the SFMTA staff for their flexibility and willingness to work with them on the restoration of some service to the hills between Districts 8 and 7, helping folks who were left stranded. She said that District 7 is far removed from downtown and has seen the least amount of attention in terms of Slow Streets. She appreciated that Director Tumlin recently biked through the district to see all the



possibilities. Commissioner Melgar said she is not happy about the delay in restoration of K and M, in particular. She commented that light rail not only moves people to downtown but also brings people to and moves them within District 7, and to institutions like the Zoo, San Francisco State University (SFSU), and City College. She said light rail is part of the ecosystem, and she was hoping the timing of the restoration would be more aligned with economic reopening. She noted bus service on Ocean is helpful, but it does not carry anything close to the volume of rail. Commissioner Melgar stated that the merchant corridors were desperate, and merchants feel like this decision has hit like a ton of bricks.

With respect to hiring, Commissioner Melgar asked if there is anything they could do to help speed up the slow process or anything that the Office of Workforce Development (OEWD) could do to tap into existing workforce programs and to move folks into positions more quickly. Commissioner Melgar expressed that they need to support the economic recovery of the neighborhood commercial districts as they employ people and are an important part of the city's economy.

Ms. Kirschbaum responded that they have enjoyed some successful partnerships with OEWD. She said they will continue to stay engaged with them, as that is an important recommendation as they try to accelerate hiring. She added that the city drive program that helps get potential drivers through the process of obtaining a Class B permit, which is a critical part of the program, is an example of a program where they partnered. She said that they are also working alongside OEWD to understand the downtown recovery and how they can support neighborhood commercial districts. Ms. Kirschbaum said she will work with their human resources department as they continue to push to fill tough-to-fill classifications.

Commissioner Melgar thanked the SFMTA for considering the 29 Rapid service for the district which is important for youth. She said it is important that youth learn to use transit - which needs to be easy and efficient - early on, as they will be lifelong riders. She added that she looks forward to speeding up the timeline and doing whatever they can do on the Board, especially if it is about projecting more stable sources of funding before SFMTA can put out the lists.

Commissioner Mar echoed his colleagues' words of appreciation, particularly for bringing back the N Judah in May, the 18 serving the west side in August, and 29 Rapid service. He said that this past year has shown dramatically different travel patterns with less congestion and fewer overall trips, but more in neighborhoods. He said that much of the capacity of the transit system has been focused on getting downtown. He added that the District 4 (D4) study showed that 65% of trips within D4 are taken by car. He asked how they are taking the lessons of the pandemic to better serve trips within and between neighborhoods.

Ms. Kirschbaum responded that the pattern he just described is what has guided transit service recovery. She said that the pandemic took downtown out of the equation and made connectivity to neighborhood, commercial, grocery stores, and hospitals their highest priority and taught them a lot about the transportation network. She said that downtown continues to be a big driver of trips, and they will need to continue having a strong network. She added that they need to grow the system between neighborhoods and within neighborhood destinations.

Mr. Maguire added that it was not a one size fit all situation and the goal is to reduce



that 65% of car trips, but not all of it will be on bus and rail.

Director Tumlin said both Richmond and Sunset provide a complete grid of streets to be able to experiment with slow street corridors and different design techniques that do not diminish opportunities for any user or group. He said they are looking for more opportunities for families to make those short trips on any means of transportation safer.

Commissioner Mar said that it is critical that people have the opportunity to take transit. He said they have adapted many streets to serve new purposes, but all of these changes have caused cumulative effects. He said it has made it much harder to drive between the Richmond and Sunset, and asked what the plan was to properly manage traffic as volumes increase significantly. He said that data shows 20,000 vehicles on Upper Great Highway previously and asked how they were going to manage as that comes back, especially if there is a short-term shift to driving versus public transit. He added that he understands the concept is to direct traffic to Sunset Boulevard, but he also has serious concerns about what that means for Lincoln Boulevard with no signal lights in that stretch.

Mr. Maguire said that it is a delicate balance. He said the arrows [routing] shown on the map only work if they address pinch points. He said that Great Highway and Lincoln are two of the important points they are currently working on. He said to address the congestion, they are looking into changing signal timing, and adding more green time to Sunset Boulevard so that it flows more smoothly, as well as improving signage for motorists who are traveling south on Great Highway towards Lincoln, so that they understand how to make the turn safely. With regard to safety, he said they would draw from the same toolbox used to build out the quick build vision zero network. Mr. Maguire said they also want to make sure that any work that they do to smooth out traffic flow does not increase speed.

Commissioner Safai asked SFMTA staff to explain why they were not restoring light rail service in some areas and keeping buses instead. He said when they were going into COVID, they were able to work with nurses to accelerate the timeline for hiring. He suggested engaging with the operators' union to accelerate the process for hiring drivers.

Ms. Kirschbaum said that the rail operator challenge is entirely about training and not hiring. She said that all operators start as bus operators, and they have a long list of bus operators excited for the opportunity to become a rail operator. She added that it is about not cutting corners and not compromising the safety of the training programs. She said they are on track to train 45-50 more operators between now and the end of August. Ms. Kirschbaum expressed that the challenge is that there are 100 supervisor positions open, and they anticipate upcoming retirements. She shared that because rail operators have training and very relevant experience, they compete well for the supervisor positions.

Commissioner Safai asked if they were working with operator unions at the table to help accelerate the process. He said they fought to bring back the bus line to replace the light rail and had long conversations about how much debt SFMTA would take on. He added that they also had numerous conversations with the finance team to understand the amount of money that is needed to restore service and said he's frustrated that they only have 80% of the story.



Ms. Kirschbaum said they work closely with the union. She said that the main reason to restore the F line is because of operator advocacy and working with the union to get barriers on historic trains so they are protected while maintaining the historic character of the cars. She said they are also incorporating rail training based on feedback from the union. She added that there are lots of operators where English is not their first language, so they have adjusted the program to be more hands on while addressing different learning styles.

Commissioner Safai asked if there was any way to accelerate that process for who gets promoted to supervisor based on how it would impact service. He said that is the type of result that a partnership with the union would help achieve. He asked Director Tumlin, going forward, through the Chair if he could make this a priority. He said it is quick moving and would help to have a monthly update on the recovery plan given all of the changes coming.

Director Tumlin responded that a monthly update may be too frequent given the pace of change. He said however that he is certainly happy to provide updates in regular conversations with the Board on impacts in their respective districts, with every other month or quarterly updates to the full Board.

Commissioner Safai replied that 60 days would be good and as needed, individual briefings. He asked about the temporary Slow Streets and car-free streets put into place citywide during the pandemic, and what was the plan and timeline to pull those back.

Mr. Maguire replied that the approach is neighborhood by neighborhood. Broadly speaking, he said that the program is popular, and they hear more from people about making it permanent rather than taking away. He added that they are working to provide better, more robust and uniform infrastructure, and if there are places where Slow Streets are not working, they will take that feedback and make adjustments.

Commissioner Safai commented that as schools and the economy open up more, these programs will not work as well as when there were lower levels of traffic. He said as they see an increase in traffic, as they have already seen the freeway become more congested, it is an important conversation to be had. He acknowledged that a lot of people have enjoyed Slow Streets and car-free streets, but that it is going to be harder to justify them given serious traffic congestion and other concerns.

Mr. Maguire said they will look at places where there are pinch points and concerns and address while balancing the need to provide travel alternatives to driving.

Chair Mandelman said they will work on a regular schedule of briefings on the reopening.

Commissioner Walton acknowledged that Slow Streets are great for slowing traffic and providing a place for kids to play. He said they work well where they are asked for, but not places without transportation options or for communities who are dependent on car. He pointed out the exclusionary policies like closing JFK to black and brown communities and said that all communities have not weighed in on these closed door conversations. Commissioner Walton expressed that he has not had one conversation about JFK and said they will not exclude African Americans from participating, adding that Golden Gate Park and San Francisco streets belong to everyone.



Commissioner Mar said it sounds like defective splices in the subway have been addressed, but train control and track replacement are still needed. He asked what the timeline for those other major projects was to help ensure that the frequent delays and complete shutdown do not happen again.

Ms. Kirschbaum said that the subway renewal program is on the order of a \$1 billion investment and will take 5 to 10 years in duration. She said the design work is underway for track replacement and crossovers at Castro, Embarcadero, Van Ness, Church and Duboce and they anticipate those in a 2-3 year timeframe. She shared that the train control project was underway but was a complex project that was a significant upgrade to how they do business. She said they were going to operate the subway from 6 a.m. to 9 p.m. which would allow a larger maintenance window to get the work done and minimize break downs throughout the day. She added that they would continue to work with Director Chang and staff to ensure it fit into the next sales tax expenditure plan. Ms. Kirschbaum said that San Francisco deserves a high capacity, reliable subway, which they can get to, but it will take continued focus and investment.

Commissioner Mar said he appreciates that the SFMTA is prioritizing deferred maintenance. He said this is key to restoring public trust and getting the public to embrace transit again.

Chair Mandelman thanked the SFMTA for their extraordinary effort over the past year. He said that the drivers kept coming to work and got people where they needed to go. He also thanked SFMTA leaders as they showed serious sensitivity to equity concerns while eliminating much of the service in his District to get essential workers where they need to go in a safe way. He added that innovative things like Slow Streets have worked in some places and not others but have been a real boon where they work.

He commented that he didn't hear that the federal funds would get them out of their challenges entirely, but that they would get them to a ballot measure without layoffs. He said some of the issues around hiring and training pre-date the pandemic and were discussed as part of the Transit Performance Working Group on which he had served. He said he was excited to see the SFMTA tackle the issues that were raised, and then COVID hit, so he is happy to go back to look at the issues they had a year ago rather than having to focus solely on pandemic emergency issues.

During public comment, Christopher Peterson said he is dismayed at how slowly Muni is restoring service being that Congress has provided unprecedented amounts of funding. He said that the prolonged service limitations may lead to a transit death spiral as well as slow economic recovery which will reduce fares and contribute to Muni's decline. He said Muni should be creative and shared an example of cleaning the buses, stating that it does little to impact transmission now that vaccination is underway, and yet reduces service capacity.

A member from the Concerned Citizens of Richmond said the meeting discussion made their blood boil. They suggested opening the gate to Great Highway and the problems would go away, and as they remain stuck in the Richmond, she hoped that both Commissioners Mar and Chan do the right thing to help their respective Districts.

Brian Wiedenmeier with the San Francisco Bike Coalition thanked the Board and staff



for the hearing. He said what they have seen over the past year is that Slow Streets, car-free spaces, and shared spaces have helped neighborhood commercial corridors and helped improve safety. He said that shared spaces, Slow Streets, and car-free spaces in parks can be supportive of the economic recovery, as they have heard from folks who have benefited across San Francisco. He urged SFMTA to make them permanent and expand upon them based on feedback from the community.

Richard Rothman, a Richmond District resident said that closing the Great Highway will have a great impact in the Richmond District. He said the biggest employers are in the western half of the city including the Veterans Affairs (VA) Hospital. He shared that all the cars are backed up all the way to Fulton Street and people are driving on Chain of Lakes Drive. He suggested opening the Great Highway, half to cars and the other half to bicyclists and pedestrians.

Serena Unger who lives next to Golden Gate Park said that she's a mother and urban planner who knows they need to take action on climate change. She said she has lived 20 years without a car and supports the closure of JFK for kids' safety as they play. She said they need to act to reduce greenhouse gas emissions and closing roads to cars helps address that.

John Elliot, a District 1 resident said that it can't go back to the way it was before, as this is a unique opportunity. He said that this is their Embarcadero freeway movement in making the city more accessible. He shared that they are not stuck in the Richmond area as he navigates the city on his bike. Mr. Elliot said If they want to be equitable, 1 in 4 streets should not be accessible to cars.

Jean Barish with Save Muni urged the Board to postpone a final decision at this time. She said the original decision was a temporary response and the Great Highway is part of an arterial network that relieves traffic impact on local streets. She said that a decision on permanent closure is premature until the lifting of the health order. She added that they need robust outreach in Richmond and Sunset before enacting a permanent plan.

Cat Carter with San Francisco Transit Riders (SF Transit Riders) thanked SFMTA staff from Director Tumlin to the operators and maintenance staff. She thanked Ms. Kirschbaum and Mr. Ramos for their efforts and Commissioner Chan for calling the hearing and raising important questions. She said they understand SFMTA has real challenges and urged the Transportation Authority to assist in helping hire and train operators. She said now is not the time for half measures, and they need to grow transit to build back better. She commented that there were too many car dependent people in San Francisco, and that robust Muni service gives people an alternative. She added that Slow Streets are great, but Muni is critical for mobility, equity, safe streets, and climate goals.

An Outer Sunset resident said she lives directly across from the closed Great Highway and when she opens her front door she is faced with buses, commercial and industrial traffic and motorcycle gangs, saying many blow off stops signs. She said people need to travel north/south, that the closure is not working, and it should be made temporary not permanent.

Olivia Gamboa, a Richmond resident, and physician said she really enjoyed Slow Streets, car-free JFK and Great Highway to commute to work. She said there are lots of other places to drive, but if she wants to take a 5-year-old on a bike, there are few



places to take them. With respect to Mr. Maguire's earlier point, she said they need to continue to look at pinch points, and not destroy what makes their city livable. She added that they declared a climate emergency and vision zero, but the City is not acting like it.

A member of the SF Transit Riders voiced his concern about restoration of only 70% in 2021 and 85% of transit service in 2022. He said this is not a world class plan and SFMTA has no plan for full restoration. He said this could lead to further cuts and a continued decrease in ridership. He added that trying to shoehorn needs into this budget is a gargantuan task but deserves focus and it is vital that the city gets it right.

Barry Toronto said he appreciates the great comments and suggestions as well as increased service. He shared that he was on the 38 Geary recently and it was completely packed with no social distancing, and riding taxis after 9 p.m. has become dangerous. He said it is good that they have expanded paratransit, but many do not practice the current safety mandates put in place and drivers should be rewarded for the risks they take. He added the double parking, number of food deliveries and TNCs has increased making it hard for Muni to get around.

Hayden Miller, a San Francisco high school student, said he is worried about how he is going to get to school with the current service. He said SFMTA is following scientific guidance that says 3 feet distance is safe but continue to do unnecessary and unscientific cleaning of transit vehicles that slows down service. He commented that they say they don't have enough operators, but he's witnessed operators standing around looking at phones when they are supposed to be ambassadors. He said he supports operators, but they should be working. He added that people need to get around so the economy can work, so he and others can get to school, and that 70%-85% of service is not acceptable.

A caller thanked Muni bus drivers for their service and patience. She said the Slow Streets are a mess and the Page Street traffic has now been pushed to Oak Street and they have been inundated with all kinds of hazards. She said after the pandemic, people will want to use their cars and urged the Board not to make Slow Streets permanent. She said these were supposed to be temporary and now are being proposed to be permanent which causes distrust in the public. She noted she uses transit and doesn't own a car.

Roland Lebrun said he had a suggestion to get more funds to address some of the concerns raised by other callers. He referenced a letter dated March 8 that he wrote to the Metropolitan Transportation Commission (MTC) and that will be under tomorrow's MTC Programming and Allocations Committee Item 7B. Mr. Lebrun said Santa Clara County sales tax revenues are up 7%, and as a result VTA is projecting a \$96.8 million surplus for Fiscal Year 21, and yet VTA is on deck to get more funds tomorrow at MTC. He urged Commissioners Josefowitz and Ronen in their role as MTC Commissioner to have a robust conversation regarding the equitable distribution of federal relief funds at MTC tomorrow.

Pete Wilson, Executive Vice President Transport Workers Union Local 258 shared his appreciation for Commissioner Safai and said his questions raised regarding the trains. He said they would have liked to have seen 1 to 2 train lines running to keep the operators practiced so that they didn't have to be re-trained. He said it would have also been excellent for new people to be scheduled at the same time, but



nonetheless he is excited to see rail lines up and running again. He said he is not a big advocate of driving, but many operators have moved out of the city and now travel in for work. He said they are getting parking tickets because Bay Area Rapid Transit (BART) closes at 9 p.m., and he said that they have received no assistance from the SFMTA. He raised another issue stating that the City tells their employees to stay home if they are sore or have a cough but then they are receiving suspensions for attendance.

Maryo Mogannam, President of the San Francisco Council of District Merchants Associations said that he sent an email expressing his concerns about the progress of the Golden Gate Park Sustainable Access (JFK closure) stakeholder work group. He said they have addressed many variables, but not equitable access. Mr. Mogannam said they are dancing around the toughest topic and until it's addressed, they can't make any germane progress. He urged the Board to ask the task force to go back and have a more sincere and open dialogue.

A caller said he is frustrated by the city's implementation of the transit system. He said that since he has moved to San Francisco he has noticed that cars don't work, but that doesn't mean none of other services shouldn't work either. He said the projects that the SFMTA have allocated their resources to have been destructive to transit and have been reliably transit destructive especially during the pandemic.

Theodore Randolph an Excelsior District resident said that Slow Streets can be successful if they are given a fair chance to be successful. He said the only slow street in his neighborhood is Excelsior Road, which is steep, whereas in other neighborhoods, Slow Streets are flat, and are well enjoyed. He said that Slow Streets can be done quickly, but when he has asked for more realistic streets in his district, nothing happened. He suggested that the intersection of Excelsior Avenue, and Cayuga and Holloway should be turned into a Slow Street. He said before they decide to shut down the Slow Streets in District 11, they should give a chance for them to succeed.

Adam Jamin, a District 1 resident, asked the Board to continue to support Director Tumlin in his efforts to restore the Muni system. He said as a senior citizen he rides a bike as well as owns a vehicle, and he said he takes advantage of the Slow Streets in his neighborhood. He said his advice is to keep transit first and to get SFMTA to restoring service as fast as possible and increase when they can.

A caller pleaded to make policies that are inclusive of all San Francisco residents of all ages, abilities, and incomes. They said at a time when the elders are risking their lives, families want to protect them by personally transporting them for their daily errands. They said Muni is not a viable option for those that are unable to walk or stand for long periods of time waiting or climb steps in the vehicles. They said that everyone should be prioritized to public spaces. Both Great Highway and JFK drive have bicycle lanes and that everyone else needs to have access as well. He asked for there to be consideration of air quality impacts in neighborhoods from 20,000 cars that hit the Outer Sunset and Outer Richmond areas and it's not fair to those neighborhoods.

A District 1 resident called in to support the SFMTA for what they have been doing to increase transit ridership. He said he supports making Slow Streets permanent and car-free JFK and Great Highway. He shared that about 150 years later, they are finally catching up with Frederick Olmsted's vision and realizing there are a lot of spaces in



the city where people lack access to safe, outdoor space and he hopes they continue on this path.

An Outer Richmond resident said that her family has enjoyed Slow Streets as the city has been shut down. She said that as the city opens up, what has not been addressed are the people who cannot use transportation, take transit or ride bikes because they are immobile, disabled, their Immune system is compromised, and/or they have a family. She said that the temporary closure has resulted in traffic increases and shared that on the weekends they are blocked in on that side of town. She added that safety and parking issues in both the Richmond and Sunset area also need to be addressed. She said that a large percentage of residents in the Richmond District are against the continued and temporary road closure and urged leaders to keep the residents in consideration when they make a decision on reopening the Great Highway, and to keep San Francisco safe for all.

Matt Brazino, a District 8 resident, and a parent of 2 under the age of 3, said that his family uses bicycles as a main mode of transportation. He shared that he has been suffering 10 months from COVID and, as a result cannot ride a normal bike. He said thankfully there are electric bikes that he can use to travel safely with his family without harming the planet. With respect to making JFK car-free, he said that it's safe, exhaust free, and desirable. He added that a car-free highway encourages people to travel more by scooter or bike. He said there are 3,000 free parking spots in Golden Gate Park and more on Lincoln and Fulton and said that doesn't exclude anyone, but actually expands access to more people. He said that he will reach out to Commissioners Walton and Safai to discuss the issues further.

A San Francisco Bike Coalition and SF Transit Riders member expressed support for making Slow Streets permanent and additionally expanding across the city. He said there are equity issues but that doesn't mean they need to shut them down. He said they are a transit first city and should expand service. He said they should be flexible, and get people moving in a way that addresses their climate emergency.

Patrick, a long-term resident of District 2 and District 5 shared support for all Slow Streets and expanding Slow Streets while keeping JFK drive car-free. He said they don't need more space for cars in the city and stated that he hopes both Commissioners Walton and Safai change their position on.

Luke Borneheimer, a District 8 resident and father thanked SFMTA for trying people-oriented spaces, such as JFK, and stated that it's critical that they make Slow Streets and JFK closure permanent. He said that they need to provide better Muni access, especially for Districts 10 and 11 residents and added that Commissioner Mar's work to provide traffic calming for the Great Highway closure was inspiring.

Natasha Boule, a District 2 resident expressed her support for making Slow Streets permanent, keeping JFK car-free, and restoring Muni to full service. She shared that before JFK was car-free, she experienced harassment, and urged the Board to keep the impact on women in mind.

Jay Bain, a Richmond resident, said though he appreciates other point of views, they do not speak for him or any other District 1 resident who chooses to walk, bike or use transit for commuting, essential trips, and recreation. Mr. Bain said that his family walks, bike, and rides for short trips, and travels by car for further commutes. He said there are not traffic jams 100% of the time and when there is a delay it only adds a few



more minutes to their driving time. He encouraged SFMTA to use data and not traffic optics of a few drivers when making their decisions.

Steven Boss expressed his support and said he would like to see the Slow Streets program expanded. He asked if they were opposed to a people-prioritized JFK sharing that it is the most loved change in San Francisco.

A District 1 resident expressed strong support for keeping Slow Streets and JFK, in particular, car-free. He said he uses the route daily and has seen 300-400% increase of people on bikes and walking through the park. He said they don't have to worry about being hit by a car when doing daily exercise and everyone enjoys the fact there are not cars.

A caller suggested that Commissioners Walton and Safai visit and experience car-free JFK.

An Outer Richmond resident shared his support towards car-free JFK and said he has gone on walks with his family and has witnessed community building and serendipitous passings.

Commissioner Chan thanked Commissioner Mandelman and Director Chang for holding the hearing and her colleagues for hearing out the presentation and comments and her constituents for calling in. She noted that the public comment illustrated that her constituents have a diversity of opinions, especially as it relates to how JFK and the Great Highway closures impact the city.

Commissioner Chan said that the Great Highway and JFK closures have benefits, and she is glad people are enjoying them, but she also has constituents with concerns about access for elderly parents, and the need to drive, along with constituents who work in the South Bay. She also addressed the negative comments directed towards her colleagues, sharing that she grew up in Chinatown, and firsthand experienced how hard it was to visit JFK. She said there are equity issues affecting places like Bayview and Chinatown and they have to fight for green space and equity in access and said when they have a road closure, that creates segregation. Commissioner Chan said she shares that passion in Walton's comments and said that per SFMTA's presentation, the people will have to make a choice between public transit and private vehicles. She said saying that it's not a one size fit all approach pits her constituents against each other and is an easy way out. She said as experts, they need to provide expertise and data to make these decisions. With respect to the Golden Gate Park Sustainable Access study, she said she wanted to ensure the Board was aware that it is coming along, and Transportation Authority staff are helping to facilitate the conversation, and urged her constituents to contribute to the study, as well as the D4 Mobility Study and Great Highway. She echoed Commissioner Safai's comments on hearing back from the SFMTA regularly and closed by stating that she is looking to her colleagues to help hold the city accountable and to vet out the plan.

12. Connect SF Transit Strategy Update - INFORMATION

This item was deferred to the call of the Chair.



Other Items

13. Introduction of New Items - INFORMATION

Chair Mandelman called for a hearing on the troubling trends they have seen in recent years with the delivery of large transportation capital projects that are far too often delayed, over budget, or beset by unforeseen technical challenges, like the Twin Peaks tunnel track replacement, Van Ness BRT, or Central Subway.

He shared that last month the Controller's office issued an audit of the SFMTA's effectiveness at delivering capital projects and found that the agency needed to improve internal processes for accountability, communication, and collaboration among divisions and stakeholders, and included 16 specific recommendations. He said he would like for the Board to have an opportunity to hear from SFMTA about what they're doing to respond to the findings of the report and their progress on implementing those recommendations.

Chair stated that as they look ahead to various upcoming infrastructure projects, from Better Market Street to the Downtown Rail Extension, it's important to take a close look at what's not working and what they can do to change that. He added that it is especially important as they anticipate going to the voters next year for a renewal of the Prop K transportation sales tax and potentially other revenue measures. He said they should do everything they can to assure voters that transportation leaders take these problems seriously and are working diligently to ensure they don't happen on the next project.

14. Public Comment

During public comment, Roland Lebrun said he would be submitting his comments in writing due to time constraints.

15. Adjournment

The meeting was adjourned at 1:12 p.m.

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RESOLUTION ADOPTING SUPPORT POSITIONS ON ASSEMBLY BILL (AB) 43 (FRIEDMAN), AB 455 (BONTA, WICKS, WIENER), AB 550 (CHIU), AB 917 (BLOOM), AND AB 1238 (TING)

WHEREAS, The Transportation Authority approves a set of legislative principles to guide transportation policy advocacy in the sessions of the Federal and State Legislatures; and

WHEREAS, With the assistance of the Transportation Authority's legislative advocate in Sacramento, staff has reviewed pending legislation for the current Legislative Session and analyzed it for consistency with the Transportation Authority's adopted legislative principles and for impacts on transportation funding and program implementation in San Francisco and recommended adopting new support positions on AB 43 (Friedman), AB 455 (Bonta, Wicks, Wiener), AB 550 (Chiu), AB 917 (Bloom) and AB 1238 (Ting), as shown in Attachment 1; and

WHEREAS, AB 550 (Chiu) would authorize the local use of speed safety cameras, which are currently used in 142 communities in the United States and has been shown to have a meaningful safety impact by reducing severe and fatal traffic collisions by as much as 58 percent; and

WHEREAS, The Vision Zero Task Force is supportive of speed safety cameras as a strategy to reduce traffic violence because unsafe speed is one of the most commonly cited factors in traffic fatalities, being reported as a primary or secondary factor in 40% of San Francisco's fatal collisions in 2020; and

WHEREAS, The San Francisco Municipal Transportation Agency and the Transportation Authority have made seeking state authorization to implement speed safety cameras a legislative priority for several years; and

WHEREAS, At its March 24, 2021 meeting, the Citizens Advisory



Committee reviewed and adopted a motion of support for a support position on AB 550 (Chiu); and

WHEREAS, At its April 13, 2021 meeting, the Board reviewed and discussed AB 43 (Friedman), AB 455 (Bonta, Wicks, Wiener), AB 550 (Chiu), AB 917 (Bloom) and AB 1238 (Ting); now, therefore, be it

RESOLVED, That the Transportation Authority hereby adopts new support positions on AB 43 (Friedman), AB 455 (Bonta, Wicks, Wiener), AB 550 (Chiu), AB 917 (Bloom) and AB 1238 (Ting); and be it further

RESOLVED, That the Executive Director is directed to communicate this position to all relevant parties.

Attachment:

1. State Legislation - April 2021

San Francisco County Transportation Authority

State Legislation - April 2021

(Updated April 6, 2021)

To view documents associated with the bill, click the bill number link.

Staff is recommending new support positions on Assembly Bill (AB) 43 (Friedman), AB 455 (Bonta, Wicks, Wiener), AB 550 (Chiu), AB 917 (Bloom) and AB 1238 (Ting), and new watch positions on AB 629 (Chiu) and Senate Bill 735 (Rubio) as show in **Table 1**. The Board does not act on watch positions.

Table 2 provides an update on AB 117 (Boerner Horvath), on which the Transportation Authority has previously taken a support position.

Table 3 shows the status of active bills on which the Board has already taken a position.

Table 1. New Recommended Position

Recommended Positions	Bill # Author	Title and Update
Support (Currently Watch)	AB 43 Friedman D	<p>Traffic safety.</p> <p>The Transportation Authority established a Watch position at its March 23, 2021 meeting, in part due to amendments that were in process. The bill has since been amended. SFMTA worked with the author on these changes and the Mayor’s Office State Legislation Committee adopted a support position on the bill in March.</p> <p>As amended, the bill would provide significant new flexibility for Caltrans and local jurisdictions to establish speed limits that respond to specific localized safety concerns. It would now: allow authorities to consider bicyclist and pedestrian safety when adjusting speed limits; lower the prima facie speed limits to 25 mph on any highway except state highways that are located in a business or residence district; allow the state and local jurisdictions to declare speed limits below 25 mph; extend existing ability to set speed limits without an engineering study to locations approaching a business district; allow local jurisdictions to reduce speed limits below the 85th percentile; and extend the years an engineering study would apply from seven to fourteen.</p> <p>We are recommending revising the position from Watch to Support with these amendments, which will provide significant new tools to make meaningful speed limit adjustments in response to on-the-ground safety conditions in San Francisco. Local speed limit setting flexibility has been a key Vision Zero strategy and was a recommendation by last year’s state Zero Traffic Fatalities Task Force.</p>

San Francisco County Transportation Authority

Recommended Positions	Bill # Author	Title and Update
<p>Support</p> <p>(Currently Watch)</p>	<p>AB 455 Bonta D</p> <p>Coauthors: Wicks D Wiener D</p>	<p>Bay Bridge Fast Forward Program.</p> <p>The Transportation Authority established a Watch position at its March 23, 2021 meeting, as staff was still discussing the potential impact of the bill with local and regional partners and waiting to see if any amendments would be forthcoming. Last month, the bill would have established requirements for the Bay Area Toll Authority (BATA) to identify, plan, and deliver a comprehensive set of operational, transit, and infrastructure investments for the San Francisco-Oakland Bay Bridge corridor and would have authorized a pilot program for a transit- and very high occupancy-vehicle lane on the bridge after January 1, 2025 if conditions were still congested.</p> <p>As amended, this bill would simply authorize BATA, in coordination with Caltrans, to designate transit-only lanes on the San Francisco - Oakland Bay Bridge. BATA has already included a study of a transit-only lane on the bridge in its Bay Bridge Forward suite of projects. We believe establishing a regional process to determine whether to implement the lane is a more reasonable approach than mandating one at the state level. We are therefore recommending changing the current Watch position to a Support position at this time.</p>
<p>Support</p>	<p>AB 550 Chiu D</p>	<p>Vehicles: speed safety system pilot program.</p> <p>This bill would require the Secretary of Transportation to adopt guidelines by July 1, 2022 for the implementation of two types of speed safety system pilots - one for dangerous local streets, and the other for active state or local work zones. In the context of this bill, a speed safety system refers to a fixed or mobile radar or laser system or any other electronic device that utilizes automated equipment to detect a violation of speeding laws and is designed to obtain a clear photograph, video recording, or other visual image of a vehicle license plate. The pilot program guidelines must be developed in consultation with stakeholders such as Caltrans, local governments, privacy stakeholders, and racial and economic justice groups. The pilots must include privacy protections, limits on the use of data, a ban on facial recognition technology, a civil citation of no more than \$125, a low income driver diversion program, and annual reports to the Legislature beginning within two years of the pilot commencing.</p> <p>Speed detection systems have been shown to reduce the number of severe and fatal collisions by as much as 58% across the United States and have been identified as a critical tool to combat pedestrian fatalities by the city's Vision Zero Task Force and many other pedestrian safety organizations. Securing authorization for a speed safety camera pilot program has been a top priority for SFMTA and the Transportation Authority for years. Mayor Breed is already on record supporting AB 550, and SFMTA staff is requesting that the Mayor's Office State Legislation Committee adopt a Sponsor position on the bill at its April meeting. The Transportation Authority's Citizens Advisory Committee adopted a motion of support to adopt a support position at its March 24 meeting.</p> <p>A fact sheet on AB 550 is included as an attachment to this table.</p>

San Francisco County Transportation Authority

Recommended Positions	Bill # Author	Title and Update
Watch	AB 629 Chiu D	<p data-bbox="560 260 1117 289">San Francisco Bay area: public transportation.</p> <p data-bbox="560 317 1487 537">This bill builds on last year’s AB 2057 (Chiu) in that it is intended to move the Bay Area toward a more connected, coordinated, equitable, and effective regional transit system. Named the Seamless and Resilient Bay Area Transit Act, it would require the Metropolitan Transportation Commission (MTC) to consult with transit agencies, local jurisdictions, county transportation agencies, and the general public to accomplish a number of mandates, including:</p> <ol data-bbox="610 569 1516 1234" style="list-style-type: none"> 1. Establish and maintain a transit priority network for the San Francisco Bay Area. 2. By February 1, 2022, complete an integrated regional transit fare study and by January 1, 2023 complete a report on the progress of implementing the recommendations of the study. 3. By July 1, 2023, create a pilot program to implement an accumulator transit pass among multiple operators providing service in at least 3 adjacent counties. 4. By July 1, 2024, develop a comprehensive, standardized regional transit mapping and wayfinding system as well as a strategy for deployment and maintenance of the system. 5. By January 1, 2024, in partnership with the Department of Transportation and the operators of managed lanes in the San Francisco Bay Area, develop a strategy to ensure the regional managed lanes network supports seamless operation of high-capacity transit. 6. Coordinate transit agencies’ route, schedule, and fare data and develop an implementation and funding plan for deployment of real-time information. <p data-bbox="560 1251 1143 1281">It would also direct Bay Area transit agencies to:</p> <ol data-bbox="610 1308 1516 1507" style="list-style-type: none"> 1. By July 1, 2025, only use the regional transit mapping and wayfinding system developed by MTC. 2. Use open data standards to make available all routes, schedules, and fares in a specified data format and to track actual transmission of real-time information by transit vehicles to ensure that schedule predictions are available. <p data-bbox="560 1526 1516 1808">We are recommending a watch position at this time, as we expect that the bill’s language will change after the regional Blue Ribbon Transit Task Force concludes its work and releases its Action Plan, expected in June/July 2021. This ad hoc group, which includes Assemblymember Chiu, transit operators, and various representatives from transit interest groups, convened in May 2020 to develop a COVID recovery strategy as well strategies to achieve a more connected Bay Area transit system. SFMTA’s Director of Transportation, Jeffrey Tumlin and the city’s MTC Commissioner Nick Josefowitz both serve on the Task Force.</p>

San Francisco County Transportation Authority

Recommended Positions	Bill # Author	Title and Update
Support	AB 917 Bloom D	<p>Vehicles: video imaging of parking violations.</p> <p>SFMTA currently has state authority to enforce parking violations in transit-only traffic lanes with automated forward-facing cameras on transit vehicles to enforce violations such as double parking. This bill would extend that authorization to any public transit operator in the state indefinitely. It would also allow enforcement of curbside parking violations at transit stops and stations.</p> <p>We are recommending a Support position on this bill to provide SFMTA with a more effective way to cite vehicles that park in bus stop zones and by doing so, contribute to increased transit reliability and safety for loading/unloading.</p>
Support	AB 1238 Ting D	<p>Pedestrian access.</p> <p>This bill would decriminalize a number of pedestrian activities that are currently prohibited and subject to police citation, including:</p> <ul style="list-style-type: none"> • Crossing a roadway outside of a crosswalk • Crossing a roadway when no cars are present • Stepping off the curb at an intersection during a yellow light • Obeying traffic signals <p>We understand this bill is likely in reaction to a consistent practice of police stopping and ticketing jaywalkers in Southern California. We are recommending a support position on this bill since it would focus police enforcement of traffic violations on the drivers of vehicles, which are statistically much more frequently at fault for fatalities and severe injuries.</p>
Watch	SB 735 Rubio D	<p>Vehicles: speed safety cameras.</p> <p>Similar to AB 550 (Chiu), this bill would authorize a local authority to use speed safety cameras to enforce speed limits, however only within 2,500 feet of a school where there is an indication that vehicle, pedestrian, or bicycle traffic is substantially generated or influenced by the school. It would be a permanent authorization, not a pilot. The bill would also prescribe requirements for the program, including, among other things, notice to the public, issuance of civil citations, and confidentiality of data as well an appeal process.</p> <p>In general, this bill represents a limited scope authorization of speed safety cameras, while AB 550 would provide broader flexibility that would better correspond to the city's high injury network, including dangerous local roads near schools. We are recommending a Watch position in order to make it clear to legislators what the Transportation Authority's priority is with respect to authorizing these cameras. We will carefully track both pieces of legislation and can return with a recommendation for a Support position if AB 550 looks like it is not going to advance this year.</p>

San Francisco County Transportation Authority

Table 2. Notable Updates on Bills in the 2019-2020 Session

Adopted Positions	Bill # Author	Title and Update
Support	AB 117 Boerner Horvath D	<p>Air Quality Improvement Program: electric bicycles.</p> <p>In March, when the Transportation Authority adopted a support position on the bill, it would have created a \$10 million electric bicycle rebate program. Based on Board input, we approached the author to convey the Transportation Authority's support for the bill and request that 1) rebates are scaled so that lower income purchasers get bigger rebates than higher income purchasers and 2) income determinations be made using local median income instead of statewide median income. Mark Watts, our Sacramento advocate, subsequently met with the author's staff to discuss the request and testified on behalf of the Transportation Authority at the bill's hearing at the Assembly Transportation Committee on April 5, 2021.</p> <p>Recent amendments established goals that include prioritizing funding for individuals from low-income households and restricting eligibility to individuals and households with incomes below the maximum limits established in the existing Clean Vehicle Rebate Project. Presently the income cap above which households are ineligible to receive vehicle rebates are \$150,000 for single income tax filers, \$204,000 for head-of-household filers, and \$300,000 for joint filers. However, the \$10 million appropriation in cap and trade funds was also removed from the legislation, so a fund source would now have to be identified to implement the program.</p>

Table 3. Bill Status for Active Positions Taken in the 2021-22 Session

Updates to bills since the last Board meeting are italicized.

Adopted Positions	Bill # Author	Bill Title	Update to Bill Status ¹ (as of 3/30/2021)
Support	AB 117 Boerner Horvath D	Air Quality Improvement Program: electric bicycles.	<i>Assembly Transportation</i>
	AB 1499 Daly D	Transportation: design-build: highways.	<i>Assembly Transportation</i>
Oppose	AB 5 Fong R	Greenhouse Gas Reduction Fund: High Speed Rail Authority: K-12 education: transfer and loan.	<i>Assembly Transportation</i>

¹Under this column, "Chaptered" means the bill is now law, "Dead" means the bill is no longer viable this session, and "Enrolled" means it has passed both Houses of the Legislature. "Two-year" bills have not met the required legislative deadlines and will not be moving forward this session but can be reconsidered in the second year of the session which begins in December 2021. Bill status at a House's "Desk" means it is pending referral to a Committee.

ASSEMBLY BILL 550 (CHIU)

SAFE STREETS AND WORK ZONES ACT OF 2021

SUMMARY

Assembly Bill 550 protects the safety of vulnerable travelers and workers on California roads by giving local transportation authorities and the state the option of creating speed safety pilot programs informed by a stakeholder-driven process under the auspices of the Secretary of the California State Transportation Agency.

BACKGROUND

From 2005 to 2014, 363,606 Americans [were killed](#) in instances of traffic violence nationwide. Of those, 112,580 people – 31 percent – were killed in speeding-related incidents. California is no exception to the scourge of speeding fatalities: over 1,000 Californians have [died](#) in speed-related traffic collisions every year for the past five years.

In addition, work crews in state and local work zones face incredibly dangerous working conditions. Workers face a high risk of being injured or killed by distracted or speeding drivers – and many have been struck and killed in the line of duty. The number of active work zones has increased in recent years due to an influx of transportation project funds. The state has undertaken additional safety campaigns, but many sites are still very dangerous.

Jurisdictions suffering from high levels of avoidable fatal and severe collisions are desperate for additional tools to bring the number of traffic deaths down to zero. Vision Zero traffic safety initiatives underway in these localities have made some progress, but these efforts to date have not brought about the necessary reductions in injuries and deaths.

Many streets with the highest incidents of fatal and severe crashes are in regionally-identified Communities of Concern, where a high percentage of households with minority or low-income status, seniors, people with limited English proficiency, and people with disabilities reside and are

disproportionately impacted. Children going to school, pedestrians and cyclists heading to work, and seniors attending to errands are at risk every day.

Vision Zero efforts have historically focused on a traditional law enforcement response to speeding and other dangerous driver behaviors, as well as education and engineering efforts. However, these traditional enforcement methods have had a well-documented disparate impact on communities of color, and implicit or explicit racial bias in police traffic stops puts drivers of color at risk. Jurisdictions around the state are seeking alternatives to traditional enforcement mechanisms that will protect public safety while being responsive to community concerns.

THE PROBLEM

Across the United States, numerous peer-reviewed [studies](#) have shown that speed detection systems reduce the number of severe and fatal collisions by as much as 58 percent. Despite an established history, California law currently prohibits the use of these systems.

Studies have shown that speed is the *leading* factor when determining fault in fatal and severe collisions, yet existing efforts have not led to the reduction in speed and traffic violence needed to save lives and make communities safe. California must provide communities with the option to pilot this public safety tool in order to create the expectation of regular speed checking on the most dangerous streets, and in workzones where traffic work crews are in dangerous proximity to fast-moving vehicles.

THE SOLUTION

AB 550 directs the Secretary of CalSTA to bring together a stakeholder working group to establish program guidelines for the piloting of two speed

safety programs: one on dangerous local streets, and the other in active state or local work zones.

Pilot programs must comply with the following specific requirements in order to operate:

- **Program Operation:** Must be operated by a jurisdiction’s transportation department or similar administrative agency.
- **Privacy Protections:** Jurisdiction must adopt a policy setting out clear restrictions on the use of data and provisions to protect, retain, and dispose of that data. Data from a system cannot be used for any other purpose or disclosed to any other person or agency except as required by law or in response to a court order or subpoena.
- **Facial Recognition Ban:** Jurisdictions are prohibited from using facial recognition technology in a program.
- **Citation Type:** Citations are civil in nature, not criminal, and shall not result in a point on a driver’s record.
- **Fine Amount:** The total penalty amount, including fees, is capped at \$125.
- **Adjudication:** Jurisdictions must provide for a hearing and appeal process for contesting citations.
- **Equity:** Jurisdictions must offer a low-income driver diversion program with specified alternative remedies in lieu of payment and reduced fines for qualifying individuals.
- **Oversight and Evaluation:** Each jurisdiction must submit a report and evaluation to the Legislature within two years of the start of the program and annually thereafter. Reports must include a specific analysis of racial equity and financial impacts of programs developed in collaboration with stakeholder groups.
- **Sunset:** The Act and any authorized programs sunset on January 1, 2027.

The working group, informed by collaboration with stakeholders and experts, will establish additional guidelines in certain areas, including system placement, speed thresholds, warning phases prior to deployment, and community engagement.

SUPPORT

City of Los Angeles (cosponsor)
 City of Oakland (cosponsor)
 City of San Francisco (cosponsor)
 City of San Jose (cosponsor)
 San Francisco Bicycle Coalition
 Walk San Francisco

FOR MORE INFORMATION

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RESOLUTION ALLOCATING \$1,200,000 IN PROP K FUNDS, WITH CONDITIONS, FOR THREE REQUESTS

WHEREAS, The Transportation Authority received three requests for a total of \$1,200,000 in Prop K local transportation sales tax funds, as summarized in Attachments 1 and 2 and detailed in the enclosed allocation request forms; and

WHEREAS, The requests seek funds from the Traffic Calming and Bicycle Circulation/Safety categories of the Prop K Expenditure Plan; and

WHEREAS, As required by the voter-approved Expenditure Plans, the Transportation Authority Board has adopted a Prop K 5-Year Prioritization Program (5YPP) for each of the aforementioned Expenditure Plan programmatic categories; and

WHEREAS, One of the three requests is consistent with the 5YPP for the relevant category; and

WHEREAS, The San Francisco Municipal Transportation Agency's (SFMTA's) requests for Traffic Calming Removal and Replacement–FY21 and Vision Zero Proactive Traffic Calming – Visitation Valley and Portola Neighborhoods [NTIP Capital] require amendments to the Traffic Calming 5YPP, as summarized in Attachment 3 and detailed in the enclosed allocation request forms; and

WHEREAS, After reviewing the requests, Transportation Authority staff recommended allocating a total of \$1,200,000 in Prop K funds, with conditions, for three requests, as described in Attachment 3 and detailed in the enclosed allocation request forms, which include staff recommendations for Prop K allocation amounts, required deliverables, timely use of funds requirements, special conditions, and Fiscal Year Cash Flow Distribution Schedules; and

WHEREAS, There are sufficient funds in the Capital Expenditures line item of the Transportation Authority's approved Fiscal Year 2020/21 budget to cover the proposed actions; and

WHEREAS, At its March 24, 2021 meeting, the Citizens Advisory Committee was briefed on the subject request and unanimously adopted a motion of support for the staff recommendation; therefore, let it be



RESOLVED, That the Transportation Authority hereby amends the Prop K Traffic Calming 5YPP, as detailed in the enclosed allocation request forms; and be it further

RESOLVED, That the Transportation Authority hereby allocates \$1,200,000 in Prop K funds, with conditions, as summarized in Attachment 3 and detailed in the enclosed allocation request forms; and be it further

RESOLVED, That the Transportation Authority finds the allocation of these funds to be in conformance with the priorities, policies, funding levels, and prioritization methodologies established in the Prop K Expenditure Plan, Strategic Plan and relevant 5YPPs; and be it further

RESOLVED, That the Transportation Authority hereby authorizes the actual expenditure (cash reimbursement) of funds for these activities to take place subject to the Fiscal Year Cash Flow Distribution Schedules detailed in the enclosed allocation request forms; and be it further

RESOLVED, That the Capital Expenditures line item for subsequent fiscal year annual budgets shall reflect the maximum reimbursement schedule amounts adopted and the Transportation Authority does not guarantee reimbursement levels higher than those adopted; and be it further

RESOLVED, That as a condition of this authorization for expenditure, the Executive Director shall impose such terms and conditions as are necessary for the project sponsor to comply with applicable law and adopted Transportation Authority policies and execute Standard Grant Agreements to that effect; and be it further

RESOLVED, That as a condition of this authorization for expenditure, the project sponsor shall provide the Transportation Authority with any other information it may request regarding the use of the funds hereby authorized; and be it further

RESOLVED, That the Capital Improvement Program of the Congestion Management Program, the Prop K Strategic Plan and the relevant 5YPPs are hereby amended, as appropriate.



Attachments:

1. Summary of Requests
2. Brief Project Descriptions
3. Staff Recommendations
4. Prop K and Prop AA Allocation Summaries - FY 2020/21

Enclosure:

Allocation Request Forms (3)

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			District(s)
						Expected Leveraging by EP Line ³	Actual Leveraging by Project Phase(s) ⁴	Phase(s) Requested	
Prop K	38	SFMTA	Traffic Calming Removal and Replacement - FY21	\$ 50,000	\$ 100,000	51%	50%	Design, Construction	TBD
Prop K	38	SFMTA	Vision Zero Proactive Traffic Calming - Vistacion Valley and Portola Neighborhoods [NTIP Capital]	\$ 900,000	\$ 900,000	51%	0%	Design, Construction	9, 10
Prop K	38, 40	SFMTA	Lake Merced Quick Build [NTIP Capital]	\$ 250,000	\$ 250,000	43%	0%	Planning, Design	7
TOTAL					\$ 1,200,000	\$ 1,250,000	49%	4%	

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 Acronym: SFMTA (San Francisco Municipal Transportation Agency)

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
38	SFMTA	Traffic Calming Removal and Replacement - FY21	\$ 50,000	Requested funds will be used to replace approximately four legacy speed bumps with up-to-date traffic calming devices such as speed humps or cushions that meet SFMTA's current design standards. The scope also includes installation of approximately four traffic calming devices to restore devices removed by paving and utility work, which will be funded by Prop B General Funds. Construction will be complete by June 2022.
38	SFMTA	Vision Zero Proactive Traffic Calming - Visitacion Valley and Portola Neighborhoods [NTIP Capital]	\$ 900,000	The SFMTA's Vision Zero Proactive Traffic Calming Program focuses safety improvements on streets where pedestrian injuries to seniors and people with disabilities are concentrated, and in priority areas where seniors and people with disabilities live and travel. The program implements measures designed to enhance safety by reducing instances of speeding vehicles along residential streets. The Visitacion Valley and Portola neighborhoods were selected for the Vision Zero Proactive Traffic Calming Program based on a planning effort led by the Department of Public Health (DPH) to address safety for seniors and people with disabilities, which are communities particularly vulnerable to severe and fatal traffic injury. This request funds the design and construction phases for speed humps, raised crosswalks, and other low-cost traffic calming measures in the two neighborhoods at locations identified through the DPH planning process. Commissioner Ronen is supportive of using \$150,000 in District 9 NTIP funds (included in this request) to expand the scope of the project in the Portola neighborhood. Construction will be complete by December 2022.

Attachment 2: Brief Project Descriptions¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Requested	Project Description
38, 40	SFMTA	Lake Merced Quick Build [NTIP Capital]	\$ 250,000	In coordination with the District 7 Supervisor's Office, the SFMTA will build on the Lake Merced Bikeway Feasibility Study and Lake Merced Pedestrian Safety Study to develop a quick-build project on Lake Merced Blvd. from Skyline Blvd. to John Muir Drive. This request is to fund the planning (i.e., public outreach) and the design phases of this project to position it for implementation in early 2022. Quick-build projects expedite delivery of pedestrian and bicycle safety projects with traffic control such as roadway and curb paint, signs, traffic signal timing updates and post- or parking-protected bikeways. Planning and design are anticipated to be complete by December 2021.
TOTAL			\$1,200,000	

¹ See Attachment 1 for footnotes.

Attachment 3: Staff Recommendations¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Recommended	Recommendations
38	SFMTA	Traffic Calming Removal and Replacement - FY21	\$ 50,000	5-Year Prioritization Program (5YPP) amendment: The recommended allocation is contingent upon amendment of the Traffic Calming 5YPP. See attached 5YPP amendment for details. Multi-phase allocation: Recommendation is for a multi-phase allocation due to the concurrent schedules for the design and construction phases and the straightforward nature of the scope which involves standard traffic calming devices (e.g. speed humps).
38	SFMTA	Vision Zero Proactive Traffic Calming - Visitation Valley and Portola Neighborhoods [NTTP Capital]	\$ 900,000	5YPP amendment: The recommended allocation is contingent upon amendment of the Traffic Calming 5YPP. See attached 5YPP amendment for details. Multi-phase allocation: Recommendation is for a multi-phase allocation given the straightforward nature of the scope which involves standard traffic calming devices (e.g. speed humps).
38, 40	SFMTA	Lake Merced Quick Build [NTTP Capital]	\$ 250,000	Multi-phase allocation: Recommendation is for a multi-phase allocation due to the concurrent schedules for planning and design and the straightforward nature of the scope which involves standard quick-build devices (e.g. paint, safe hit posts).
TOTAL			\$ 1,200,000	

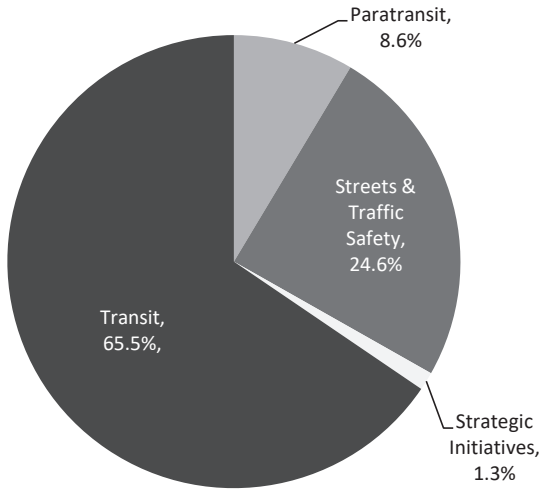
¹ See Attachment 1 for footnotes.

Attachment 4.
Prop K Allocation Summary - FY2020/21

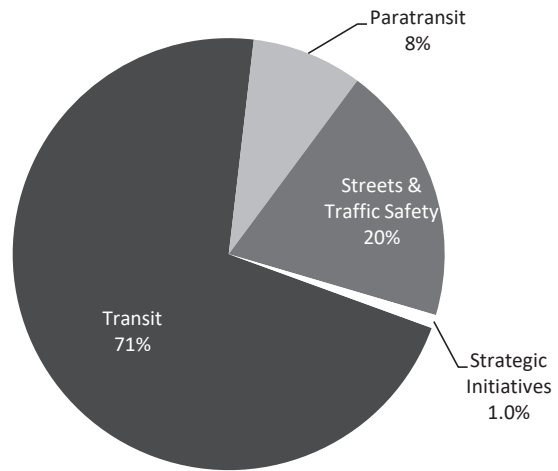
PROP K SALES TAX							
FY2020/21	Total	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	FY 2025/26
Prior Allocations	\$ 76,169,735	\$ 19,887,802	\$ 29,075,623	\$ 20,429,635	\$ 6,360,718	\$ 415,957	\$ -
Current Request(s)	\$ 1,200,000	\$ 24,106	\$ 690,894	\$ 485,000	\$ -	\$ -	\$ -
New Total Allocations	\$ 77,369,735	\$ 19,911,908	\$ 29,766,517	\$ 20,914,635	\$ 6,360,718	\$ 415,957	\$ -

the current recommended allocation(s).

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



Prop K Investments To Date





Memorandum

AGENDA ITEM 5

DATE: March 31, 2021
TO: Transportation Authority Board
FROM: Anna LaForte - Deputy Director for Policy and Programming
SUBJECT: 04/13/2021 Board Meeting: Allocate \$1,200,000 in Prop K Funds, with Conditions for Three Requests

<p>RECOMMENDATION <input type="checkbox"/> Information <input checked="" type="checkbox"/> Action</p> <p>Allocate \$1,200,000 in Prop K funds to the San Francisco Municipal Transportation Agency (SFMTA) for:</p> <ol style="list-style-type: none"> 1. Traffic Calming Removal and Replacement - FY21 (\$50,000) 2. Vision Zero Proactive Traffic Calming - Visitacion Valley and Portola Neighborhoods [NTIP Capital] (\$900,000) 3. Lake Merced Quick Build [NTIP Capital] (\$250,000) <p>SUMMARY</p> <p>Attachment 1 lists the requests, including phase(s) of work and supervisorial district(s). Attachment 2 provides a brief description of the projects. Attachment 3 contains the staff recommendations. Project sponsors will attend the meeting to answer any questions the Board may have.</p>	<p><input checked="" type="checkbox"/> Fund Allocation</p> <p><input checked="" type="checkbox"/> Fund Programming</p> <p><input type="checkbox"/> Policy/Legislation</p> <p><input type="checkbox"/> Plan/Study</p> <p><input type="checkbox"/> Capital Project Oversight/Delivery</p> <p><input type="checkbox"/> Budget/Finance</p> <p><input type="checkbox"/> Contract/Agreement</p> <p><input type="checkbox"/> Other: _____</p>
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DISCUSSION

Attachment 1 summarizes the subject allocation requests, 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 brief project descriptions. Attachment 3 summarizes the staff recommendations for each request, highlighting special conditions and other items of interest. An Allocation Request Form for each project is enclosed, with more detailed information on scope, schedule, budget, funding, deliverables and special conditions.

FINANCIAL IMPACT

The recommended action would allocate \$1,200,000 in Prop K funds. The allocations would be subject to the Fiscal Year Cash Flow Distribution Schedules contained in the enclosed Allocation Request Forms.



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

Sufficient funds are included in the adopted Fiscal Year 2020/21 annual budget. Furthermore, sufficient funds will be included in future budgets to cover the recommended cash flow distributions for those respective fiscal years.

CAC POSITION

The Citizens Advisory Committee considered this item at its March 24, 2021 meeting and unanimously adopted a motion of support for the staff recommendation.

SUPPLEMENTAL MATERIALS

- Attachment 1 - Summary of Requests
- Attachment 2 - Project Descriptions
- Attachment 3 - Staff Recommendations
- Attachment 4 - Prop K Allocation Summaries - FY 2020/21
- Enclosure - Allocation Request Forms (3)



RESOLUTION AMENDING THE SAN FRANCISCO MUNICIPAL TRANSPORTATION AGENCY'S
BUSINESS RELOCATION TRANSPORTATION DEMAND MANAGEMENT PROJECT, WITH
CONDITIONS

WHEREAS, In 2018 through Resolution 18-55, the Transportation Authority allocated \$383,000 in Prop K funds to the San Francisco Municipal Transportation Agency (SFMTA) for the Business Relocation Transportation Demand Management (TDM) Project intended to encourage sustainable commute choices by employees of businesses that are opening in or relocating to new locations in San Francisco; and

WHEREAS, Since the COVID-19 pandemic has reduced the number of businesses opening in San Francisco and changed travel patterns for employees of existing businesses, SFMTA requested an amendment to the scope, schedule, and project name (i.e., to remove "relocation" from the title) to shift the target population from businesses that are relocating between offices, to all office-based businesses that are expecting employees to return to on-site work, as permitted by public health orders; and

WHEREAS, The proposed amended scope includes support for alternate schedules and staggered arrival times to reduce traffic at peak hours; promotion of alternate modes to reduce the use of single-occupancy vehicles; and evaluation surveys, to be administered while the project is underway, that will guide continued development of resources and assess the impact of the project on return to work behaviors, including commute mode choice; and

WHEREAS, To achieve the biggest impact, SFMTA would target office-based business that have 250-1,000 employees, but are still small enough that they likely would benefit from assistance; and

WHEREAS, SFMTA would conduct additional outreach to minority owned businesses and would provide assistance to businesses outside the target size range in response to requests; and

WHEREAS, Attachment 1 provides details on the proposed amended project, including the updated scope, schedule, and budget, along with Transportation Authority staff recommendations, including special conditions; and

WHEREAS, There is no change to the total cost of the project, which is entirely funded



by Prop K half-cent sales tax fund, and there are sufficient funds in the Capital Expenditures line item of the Transportation Authority's approved Fiscal Year 2020/21 budget to cover the proposed less aggressive cash flow for the project corresponding to the proposed new project schedule; and

WHEREAS, At its March 24, 2021 meeting, the Citizens Advisory Committee was briefed on the subject amendment request and unanimously adopted a motion of support for the staff recommendation; now, therefore, let it be

RESOLVED, That the Executive Director shall update the Standard Grant Agreement for the SFMTA's Business Relocation Transportation Demand Management Project, now called the Business Transportation Demand Management Project, with conditions, to reflect the approved amendments, as detailed in Attachment 1; and be it further

RESOLVED, That the Capital Improvement Program of the Congestion Management Program, the Prop K Strategic Plan and the relevant 5YPPs are hereby amended, as appropriate.

Attachments:

1. Amendment Request and Staff Recommendations

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

FY of Allocation Action:	FY2020/21
Project Name:	Business Transportation Demand Management (Amendment)
Grant Recipient:	San Francisco Municipal Transportation Agency

EXPENDITURE PLAN INFORMATION

Prop K EP categories:	Transportation Demand Mgmt
Current Prop K Request:	\$383,000
Supervisory District(s):	Citywide

REQUEST

Brief Project Description

Develop, implement and operate a program focused on encouraging sustainable commute choices by employees of office-based businesses that are expecting employees to return to on-site work, as permitted by public health orders. The program will target mid-sized businesses and will provide transportation planning services and materials to businesses to help their employees develop sustainable commute habits from the get-go, as they return to work, rather than trying to change habits after they have already been set.

Detailed Scope, Project Benefits and Community Outreach

See attached.

Project Location

Citywide

Project Phase(s)

Construction (CON)

5YPP/STRATEGIC PLAN INFORMATION

Type of Project in the Prop K 5YPP/Prop AA Strategic Plan?	Named Project
Is requested amount greater than the amount programmed in the relevant 5YPP or Strategic Plan?	Less than or Equal to Programmed Amount
Prop K 5YPP Amount:	\$383,000

Business Transportation Demand Management

Scope Update in Response to COVID-19 Pandemic – 3/29/2021

Background

As described in the approved 2018 scope for the Business Relocation Transportation Demand Management project, the project team planned to develop, implement and operate a program focused on addressing the transportation needs of employees at businesses that as they opened in or relocated to new locations in San Francisco. The program would provide transportation planning services and materials to businesses to help their employees travel to work in their new location without driving alone, thus setting a more sustainable commute habit from the get-go, rather than trying to change habits after they have already been set.

Prior to March 2020, the strong regional economy and an increasing desire to work in dense urban settings was leading many existing companies to relocate or open a new location in San Francisco each year. This trend was predicted to increase: According to regional projections (Plan Bay Area) San Francisco was projected to add 260,000 new jobs between 2014 and 2040¹. Bay Area traffic congestion grew 84 percent between 2010 and 2016² underscoring the need to support businesses their employees connect with sustainable commute options that would allow continued growth without unacceptable increases in traffic and associated pollution.

The advent of a global pandemic has upended these trends and predictions, and is expected to have long-lasting and as-of-yet unknown impacts on business decisions around office location and occupancy. The sudden increase in remote work resulted in precipitous drops in congestion on San Francisco and Bay Area streets, but reduced transit capacity and fears of virus transmission has led to observably higher rates of single occupancy vehicle (SOV) use and rebounding congestion that has reached as high as 90% pre-pandemic levels³ even as overall travel remains depressed.

The business and commute environments have changed to such an extent that the original project focus of identifying and targeting businesses as they moved into San Francisco or moved office locations within San Francisco has become infeasible. For the foreseeable future, such moves are expected to be uncommon, and the volume of employees involved in such moves will not be large enough to warrant targeting. The need to equip businesses and their employers with a wide range of commute options, however, is more pressing than ever as San Francisco moves towards easing restrictions on office occupancy.

The intention of targeting businesses with a TDM intervention as they relocate is to capitalize on a window of opportunity when large numbers of commuters are selecting a new route to work and have not yet formed mode habits that are difficult to influence. A 2012 study found a close connection between mobility decisions and various major life events, such as a change in place of residence,

¹ https://www.sfmta.com/sites/default/files/reports-and-documents/2017/12/cap_draft_full_document-final1.pdf

² <http://www.govtech.com/fs/infrastructure/Trains-Buses-Part-of-Costly-California-Plan-to-Relieve-Bay-Area-Traffic.html>

³ <https://abc7news.com/bay-bridge-traffic-i-80-coronavirus-increasing/7441538/>

education, or employment. After a job change, about a third of all people with partial car availability changed their mobility preference inside of a year — meaning they either bought a car or some type of transit pass⁴. The emergence of COVID and resulting health orders have reduced the number of businesses moving into or relocating office locations within San Francisco, while simultaneously creating a new form of "relocation" for the vast majority of San Francisco's office workers. Many employers have maintained the same office locations, but over the past year employees have experienced a move from the office to remote work locations which is expected to be followed by a substantial shift of employees returning to their offices when public health restrictions on office occupancy are eased.

After discussion with many SF business leaders and our SF economic development colleagues, it is the view of the project team that this new form of "relocation," from the office to remote work and then a return to their offices, creates an equally strong opportunity to influence commuter mode choice, in a context where steering commuters towards sustainable options is more important than ever. After months of working remotely, each returning employee will be selecting a route and mode(s) to their office, shaped by new motivations and constraints, opening a similar opportunity to influence mode choice as exists when a business relocates their office. In the absence of strong and intentional TDM intervention, fear of virus transmission and limited transit capacity will likely result in many of these returning commuters choosing to drive into the city in single-occupancy vehicles, creating congestion that could exceed pre-COVID levels even if the total number of workers entering San Francisco remains depressed.

Proposed Amended Scope

For these reasons, the project team proposes amending the project scope to shift the target population from businesses as they relocate between offices, to all office-based businesses in advance of expected changes to public health orders which will allow an increasing number of employees to return to office settings. The intervention will feature support to transition remote work policies to align with reopening guidelines, alternate schedules and staggered arrival times to reduce traffic at peak hours, and promote alternate modes to reduce the use of single-occupancy vehicles.

The SFMTA and SF Environment will meet regularly with other City departments such as the Office of Economic and Workforce Development (OEWD), the Department of Public Health (DPH), and the Mayor's Office to ensure continued project alignment with citywide goals and priorities around re-opening. The project team will also leverage partnerships with OEWD and the Office of Small Business to connect with employers and employer groups in advance of office-reopening. Meetings will be sought with stakeholder groups such as the CDMA, local TMAs, the SF Chamber of Commerce, and the Bay Area Council.

Local Outreach Findings (from Phase 1 Work to Date)

Throughout the past year, the project team has kept in regular contact with the business community, other City departments, and regional organizations to keep pace with evolving employer challenges, priorities, and needs. This has included regular communication and meetings with associations such as the Bay Area Council, the Business Council on Climate Change (BC3) and the San Francisco Spare the Air (STA) team, local transportation management associations TMA SF Connects and Mission Bay TMA, and

⁴ <https://link.springer.com/article/10.1007%2Fs11116-012-9404-y>

city and regional government partners such as OEWD, the MTC TDM Working Group, the SF Environment Green Business Program and individual owners and leaders of businesses of all sizes. This has given the team steady access and insights into the thinking and planning of medium to large local employers in San Francisco and the broader Bay Area, which has directly informed the development of a new project design plan that addresses current and upcoming business needs and form the basis for continuing business-focused TDM work moving forward.

Select city priorities influencing project design:

- Alignment and support for compliance for all public health ordinances
- Preservation of limited transit capacity for essential workers and transit dependent
- Restoration of faith and confidence in transit as a safe transportation option once capacity is available to accommodate more customers
- Promotion of economic well-being of San Francisco businesses, including the safe return of restaurant and retail customer base when deemed appropriate by the Department of Public Health and the Mayor’s Office

Insights from businesses and business associations on challenges and needs:

- Highest priority remains maintaining business viability, often eclipsing proactive planning for other priorities
- Many office-based businesses continuing to apply a “wait-and-see” approach to changing public health guidelines rather than thoroughly planning for a return to office occupancy
- Businesses are aware and concerned about potential increase in SOV for commute, but few described plans to support employees in choosing non-SOV commute options
- Creating return-to-work plans for multiple re-opening scenarios such as different building capacity allowances, business activity curfews, or uncertain dates of changes in what is allowed is difficult and time intensive, and many small to medium businesses lack the capacity to do this without support
- Small businesses were seen as more likely that medium or large businesses to eschew robust return-to-work planning even with support
- Some businesses anticipate the challenge of planning for a partial return to office work will exceed the benefits, and may wait to return until capacity limits are raised higher than the 25% currently expected
- Misperceptions and uncertainty around current safety of transit use are widespread, with many overestimating the risk and surprised to learn COVID transmission from transit exposures have been rare, with no confirmed transmissions attributed to Muni
- Some employers are concerned that employees taking transit to the office will increase risk of workplace COVID transmission, with a small number reported to be considering or having already drafted policies discouraging use of transit on commute
- Information on safety of Muni and other transit options is very well received and appreciated
- Many businesses and groups running shuttles have resumed some level of service, all with mask requirements and capacity limits similar to public transit agencies and some with new reservation systems to ensure proper distancing. Comfort is growing that this is a safe option.
- More support from the City is needed and will be welcomed

Based on these findings, the project team identified a risk that lack of thorough return-to-work planning by businesses could lead to large numbers of employees being asked to return to their offices without

updated information and support for choosing non-personal vehicle commute modes, resulting in a rapid and uncontrolled increase in regional congestion and unacceptable travel delays throughout the city and disruption of reliable transit operation. Alternatively, businesses that feel unprepared to bring their employees back safely may opt not to bring them back at all, leading to lower impacts on congestion but an untenable economic landscape for businesses reliant on commuters as a customer base. This points to a need, anticipated to be strongest among small to mid-sized employers, for support in planning return-to-work scenarios prior to the easing of restrictions on office occupancy when San Francisco enters the Orange tier for COVID risk.

Proposed Intervention

To meet the identified need, the project team proposes providing a set of resources for businesses to use while making their return-to-work plans, and proactively reaching out to businesses believed most likely to need such resources based on number of employees and industry segment. Input and feedback on what support is most valuable will be continually sought as the team engages in outreach to connect businesses with the offered resources, and additional resources and guidance will be developed and added to a growing toolkit available online.

An introductory set of resources has been prepared, and initial feedback is currently being sought from the business community on these resources, site usability, and outreach techniques in preparation for launch of the online tool and targeted outreach in mid-March.

Prioritized businesses:

To maximize project impact with the available budget, proactive outreach will target medium-sized, office-based businesses with between 250 and 1000 employees working within San Francisco city boundaries before implementation of COVID-related public health ordinances. Businesses located in all San Francisco districts will be considered for prioritization. Minority-owned businesses will be prioritized in direct outreach to the extent that information to identify them for prioritization can be obtained.

Office-based businesses have been required to keep all employees working remotely since the first shelter-in-place order for San Francisco was issued in March 2020, and their decisions will shape how many of these employees return to on-site work choices as public health restrictions on office occupancy are relaxed and what guidance they receive on commute. Through local outreach, small to medium sized employers were identified as more likely to need support through the transition from remote to on-site work than larger businesses which have greater capacity to independently craft return-to-work plans. Targeting the largest businesses identified as needing the intervention maximizes potential project impact, as outreach calls to each business take the same amount of project team time and resources regardless of business size.

Businesses not prioritized for proactive outreach either due to size or industry will have full access to project resources via a publicly accessible website. In order to ensure that all businesses know of the resources and have opportunities to participate in the program, the project team will work with business associations and neighborhood commercial districts to distribute information on the resources and how to contact the project team. The project team will respond to all requests for support from businesses without regard for whether they are in a prioritized category.

Resources included in the toolkit:

Project resources are under development and will be regularly updated and added to through project implementation. Current resources in the toolkit include:

- consolidated information on office occupancy allowances and restrictions
- links to most recent Public Health Ordinance
- links to DPH pages providing detailed guidance on what business activities and occupancy is currently allowed and all requirements associated with on-site work
- updates on health and safety procedures for Muni and regional transit operators
- updates on Muni and regional transit service and capacity
- downloadable information on transit health and safety procedures for employers to email to employees
- downloadable information on rules and best practices for taking transit during the pandemic for employers to email to employees
- information on alternate modes available to commuters such as walking, biking, and using scooters, including information on accessing mobilityshare options
- downloadable information on alternate modes, for employers to email to employees
- downloadable sample telecommute policy
- downloadable sample telecommute agreement form
- downloadable sample telecommute survey
- link to standard business services offered by SFMTA, including how to request curb changes and purchase bulk transit passes

Initial response from businesses and business associations on proposed resource:

- Well received and seen as a potentially valuable tool
- Proposed topics for support (summary of allowed business activities, Muni safety and service updates, remote work and alternate schedule policy support, and alternative mode resources) are what businesses need as they plan for return-to-work
- Businesses with well-developed return-to-work plans will not need the resource, but some are interested in supporting the project through sharing feedback and resources
- Additional structure to guide businesses through planning steps will add value
- Building owners and property managers are primarily concerned with an expected increase in parking demand, and will welcome resources to divert commuters to non-driving modes

Project Milestones and Timeline

Phase 1: Develop Employer Relocation Mode Shift Strategy – present through March 2021 - \$100,000

- Initial project research and pilot plan development: completed
 - Literature review
 - Local outreach
 - Development of initial resources
 - Creation of website for hosting resources
 - Drafting of outreach plan
 - Compilation of business contacts for outreach at full project launch
- Soft launch of website for beta-testing: February 2021 through March 2021

- Website published as test pages, allowing access but not appearing in searches or linked from full SFMTA site
- Identifying and contacting small number of business representatives to solicit feedback on usability of online toolkit, value of current resources, and additional resources to be developed and added
- Modification of website based on initial business feedback

Phase 2: Implement Strategy and Evaluate Outcomes, April 2021 through October 2021 - \$150,000

- Full launch of project website and outreach plan: April 2021
 - Blog post on SFMTA site announcing launch of project and availability of resources
 - Website published, with links from full SFMTA site allowing businesses to discover site and navigate to it independently
 - Extended project team begins outreach via email and direct calls to target businesses
- Continued project implementation and development: May 2021 through October 2021
 - Outreach continues, expanding number of companies directly offered resources and engaged to give feedback on additional resource needs
 - Evaluation surveys employed throughout implementation period to guide continued development and assess impact
 - Follow-up with previously contacted businesses initiated to connect them with newly developed resources and build foundation for continued relationship around commute planning and support
- Focused follow-up with engaged businesses to identify and assess opportunities for strategy improvement: September 2021
- Design and preparation of refined strategy: October 2021

Phase 3: Implement Refined Strategy and Evaluate Outcomes, November 2021 through July 2022 - \$133,000

- Implement updated website, resources, and outreach plan: November 2021
- Ongoing outreach and implementation with continuous development of website and resources: November 2021 through July 2022
- Evaluation surveys employed throughout implementation period to guide continued development and assess impact: November 2021 through July 2022
- Focused follow-up with engaged businesses to identify and assess value of resource offering and impact: June 2022
- Preparation of final evaluation and reporting: July 2022

Anticipated Outcomes

This project will increase the number of San Francisco businesses with comprehensive return-to-work plans in advance of public health restrictions on office-occupancy being eased. Businesses will be prepared to make thoughtful decisions on who will return to office settings, and offer the appropriate information and support for employees to return to their commutes without a perceived lack of safe options resulting in a disproportionate amount of commuters defaulting to use of personal vehicles. The SFMTA will maintain contact with businesses, continuing to provide guidance and support for return-to-work and commute planning. The relationships and contacts built through this project will form the

basis of an ongoing employer-based TDM program, long envisioned and desired by the commissions of the SFMTA, SFCTA, SF Environment, and SF Planning Department in the jointly adopted San Francisco Transportation Demand Management (TDM) Plan 2016-2020.

Metrics and Project Evaluation:

Throughout implementation, businesses will be directly contacted both to connect them with project resources and to solicit input on additional resource needs and feedback on project impact. This information will be compiled and included in Phase 2 pilot evaluation, and shape the refined strategy recommended for Phase 3.

In addition to this feedback, metrics that will be tracked include:

- Businesses reached through outreach
- Businesses who reach out to SFMTA for support
- Number of businesses reached that have return-to-work plans
- Website impressions, unique visits
- Contact list additions (opt-in)
- Survey Data, including commute mode choice

Survey questions may include:

- Initial
 - What does your company have in place? (list)
 - How comfortable do you feel bringing employees back to on-site work?
 - How many employees would you plan to bring back if 25% occupancy is allowed? 50%? 75%?
 - Which transportation modes did employees use to travel to work before the pandemic?
 - How do you anticipate transportation mode choice changing due to the pandemic?
- Follow-up
 - What does your company have in place now? (list)
 - Did you make use of any resources offered by SFMTA?
 - Which resources?
 - How comfortable do you feel bringing employees back to on-site work?
 - How did resources offered by SFMTA affect comfort and confidence with bringing employees back to on-site work?
 - How many employees did you bring back when 25% occupancy was allowed? 50%? 75%?
 - How did resources offered by SFMTA affect the % of employees brought back?
 - How did resources offered by SFMTA affect transportation mode choice among employees

San Francisco County Transportation Authority

Prop K/Prop AA Allocation Request Form

FY of Allocation Action:	FY2020/21
Project Name:	Business Transportation Demand Management (Amendment)
Grant Recipient:	San Francisco Municipal Transportation Agency

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)				
Environmental Studies (PA&ED)				
Right of Way				
Design Engineering (PS&E)				
Advertise Construction				
Start Construction (e.g. Award Contract)	Apr-May-Jun	2018		
Operations (OP)				
Open for Use				
Project Completion (means last eligible expenditure)			Jul-Aug-Sep	2022

SCHEDULE DETAILS

see scope document.

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

FY of Allocation Action:	FY2020/21
Project Name:	Business Transportation Demand Management (Amendment)
Grant Recipient:	San Francisco Municipal Transportation Agency

FUNDING PLAN - FOR CURRENT REQUEST

Fund Source	Planned	Programmed	Allocated	Project Total
PROP K: Transportation Demand Mgmt	\$0	\$0	\$383,000	\$383,000
Phases in Current Request Total:	\$0	\$0	\$383,000	\$383,000

COST SUMMARY

Phase	Total Cost	Source of Cost Estimate
Planning/Conceptual Engineering (PLAN)	\$0	
Environmental Studies (PA&ED)	\$0	
Right of Way	\$0	
Design Engineering (PS&E)	\$0	
Construction (CON)	\$383,000	previous allocation request
Operations (OP)	\$0	
Total:	\$383,000	

% Complete of Design:	N/A
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

Business TDM Program Costs

Agency: SFMTA		Overhead Rate: 0.803		
Position (Title and Classification)	Hours	FY21 Hourly Fully Burdened	FTE	Cost
Manager VI / 9174	45	\$ 266.19	0.02	\$ 11,015
Transit Planner IV / 5290	120	\$ 241.01	0.06	\$ 26,035
Transportation Planner II / 5288	385	\$ 176.55	0.19	\$ 62,149
Planner I / 5277	430	\$ 148.13	0.21	\$ 59,868
SFMTA Subtotal	980		0.47	\$ 159,066

Agency: SFE		Overhead Rate: 2.42		
Position (Title and Classification)	Hours	FY21 Hourly Fully Burdened	FTE	Cost
Project Supervision	27	\$ 184.57	0.01	\$ 5,127
Project Oversight	120	\$ 166.31	0.06	\$ 17,591
Project Staff 1	350	\$ 152.19	0.17	\$ 47,666
Project Staff 2	325	\$ 107.09	0.16	\$ 27,870
Outreach Support	250	\$ 103.51	0.12	\$ 26,110
SFE Subtotal	1,072		0.40	\$ 124,365

CONTRACT - Consultant support				
Position (Title and Classification)	Hours	Hourly Fully Burdened	FTE	Cost
Marketing and outreach consultant	340	\$ 250.00	0.16	\$ 85,000

Construction Phase Hard Costs (by scope item)				
Item	Quantity	Unit Price	Cost	
Outreach Materials	1	\$ 5,000	\$ 5,000	
Mailing costs	1	\$ 4,569	\$ 4,569	
Survey costs (mailers, mailing, etc)	1	\$ 5,000	\$ 5,000	
Sub-total			\$ 14,569	
Construction Contingency (none)			-	
Construction Hard Costs Total			\$ 14,569	

TOTAL	\$	383,000
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Budget																													
Task	SFE Project Supervision			SFE - Project Oversight			SFE - Project Staff 1			SFE - Project Staff 2			SFE - Outreach Support			SFMTA Program Supervisor			SFMTA - Project Oversight			SFMTA - Project Staff			SFMTA Project Assistant				
	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost	Fully Burdened Cost		
Business Outreach																													
1. Develop Employer Relocation Mode Shift Strategy																													
1.1 Literature Review	\$ 949	\$ 3,344	\$ 2,880																										
1.2 Outreach and Local Research	\$ 949	\$ 3,344	\$ 8,639	\$ 4,054																									
1.3 Strategy Implementation and Evaluation Plan	\$ 1,328	\$ 3,344	\$ 6,911	\$ 3,243																									
2. Implement Strategy and Evaluate Outcomes																													
2.1 Implement Strategy	\$ -	\$ 1,663	\$ 9,131	\$ 6,425	\$ 18,114	\$ 1,331	\$ 2,410	\$ 13,241	\$ 11,110	\$ 39,569																			
2.2 Evaluate Strategy	\$ -	\$ 1,663	\$ 4,566	\$ 3,213																									
2.3 Revise Strategy Implementation Plan	\$ -	\$ 1,663	\$ 4,566	\$ 3,213																									
3. Implement Refined Strategy and Evaluate Outcomes																													
3.1 Implement Revised Strategy	\$ -	\$ 1,713	\$ 8,622	\$ 6,067	\$ 7,996	\$ 1,371	\$ 3,724	\$ 10,001	\$ 15,258	\$ 60,000																			
3.2 Evaluate Revised Strategy	\$ 1,901	\$ 856	\$ 2,351	\$ 1,655																									
Subtotals	5,127	17,591	47,666	27,870	26,110	11,015	26,035	62,149	59,868	100,000																			

San Francisco County Transportation Authority

Prop K/Prop AA Allocation Request Form

FY of Allocation Action:	FY2020/21
Project Name:	Business Transportation Demand Management (Amendment)
Grant Recipient:	San Francisco Municipal Transportation Agency

SFCTA RECOMMENDATION

Resolution Number:		Resolution Date:	
Total Prop K Requested:	\$383,000	Total Prop AA Requested:	\$0
Total Prop K Recommended:	\$383,000	Total Prop AA Recommended:	\$0

SGA Project Number:	143-907057	Name:	Business Relocation Transportation Demand Management - Phase 1 (Amendment)
Sponsor:	San Francisco Municipal Transportation Agency	Expiration Date:	09/30/2021
Phase:	Construction	Fundshare:	100.0

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	\$100,000	\$0	\$0	\$0	\$0	\$100,000

Deliverables

1. Upon completion of Phase 1 (anticipated April 2021), provide: 1) memo documenting findings of literature review and relevant research, and inventory of attributes and outcomes of these efforts; 2) memo summarizing outreach and local research including documentation of opportunities, constraints, and best practices including those of local Transportation Management Agencies; and 3) implementation and evaluation plan for all subsequent work.

Notes

1. Funds were allocated through Board approval of Resolution 18-55 in May 2018.

SGA Project Number:	143-907058	Name:	Business Transportation Demand Management - Phase 2 (Amendment)
Sponsor:	San Francisco Municipal Transportation Agency	Expiration Date:	03/31/2022
Phase:	Construction	Fundshare:	100.0

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	\$75,000	\$75,000	\$0	\$0	\$0	\$150,000

Deliverables

1. Upon completion of Phase 2 (anticipated October 2021), SFMTA shall provide a summary of outreach activities and findings; a memo summarizing evaluation conducted during Phase 2; and a memo describing the revised project implementation plan and evaluation strategy.

Special Conditions

1. SFMTA will include Transportation Authority staff in forums and outreach events with engaged businesses to identify and assess opportunities for strategy improvement and overall value and impact of the project. Applicable events will be identified based on review of project meeting calendar, which SFMTA shall provide.

2. Reimbursement is conditioned on Transportation Authority approval of project survey and evaluation plan.

Notes

1. Funds were allocated through Board approval of Resolution 18-55 in May 2018.

SGA Project Number:	143-907059	Name:	Business Transportation Demand Management - Phase 3 (Amendment)
Sponsor:	San Francisco Municipal Transportation Agency	Expiration Date:	09/30/2022
Phase:	Construction	Fundshare:	100.0

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	\$0	\$100,000	\$33,000	\$0	\$0	\$133,000

Deliverables

1. Upon completion of project and evaluation (anticipated July 2022), provide draft of final report for Transportation Authority review and comment. Upon completion, provide copy of final report.

Special Conditions

1. SFMTA will include Transportation Authority staff in forums and outreach events with engaged businesses to identify and assess opportunities for strategy improvement and overall value and impact of the project. Applicable events will be identified based on review of project meeting calendar, which SFMTA shall provide.

2. Reimbursement is conditioned on Transportation Authority approval of project survey and evaluation plan.

Notes

1. Funds were allocated through Board approval of Resolution 18-55 in May 2018.

Metric	Prop K	Prop AA
Actual Leveraging - Current Request	0.0%	No Prop AA
Actual Leveraging - This Project	0.0%	No Prop AA

San Francisco County Transportation Authority

Prop K/Prop AA Allocation Request Form

FY of Allocation Action:	FY2020/21
Project Name:	Business Transportation Demand Management (Amendment)
Grant Recipient:	San Francisco Municipal Transportation Agency

EXPENDITURE PLAN INFORMATION

Current Prop K Request:	\$383,000
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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

CONTACT INFORMATION

	Project Manager	Grants Manager
Name:	Crysta Highfield	
Title:	Transportation Planner II	
Phone:	(415) 646-2454	
Email:	crysta.highfield@sfmta.com	



Memorandum

AGENDA ITEM 6

DATE: March 25, 2021

TO: Transportation Authority Board

FROM: Anna LaForte - Deputy Director for Policy and Programming

SUBJECT: 04/09/21 Board Meeting: Amend the San Francisco Municipal Transportation Agency's Business Relocation Transportation Demand Management Project, with Conditions

RECOMMENDATION Information Action

Amend the San Francisco Municipal Transportation Agency's (SFMTA's) Business Relocation Transportation Demand Management (TDM) Project, with Conditions

SUMMARY

In 2018, through approval of Resolution 18-55, the Board allocated \$383,000 in Prop K funds to SFMTA for the Business Relocation TDM Project intended to encourage sustainable commute choices by employees of businesses that are opening in or relocating to new locations in San Francisco. As the COVID-19 pandemic has reduced the number of businesses opening in San Francisco and changed travel patterns for employees of existing businesses, SFMTA requests an amendment to the scope, schedule, and project name (removing "relocation" from the title) to shift the target population from businesses that are relocating between offices, to all office-based businesses that are expecting employees to return to on-site work, as permitted by public health orders. The amended scope will feature support for alternate schedules and staggered arrival times to reduce traffic at peak hours, and promotion of alternate modes to reduce the use of single-occupancy vehicles. Attachment 1 describes the proposed amended project, including the updated scope, schedule, and budget, along with the staff recommendations, including special conditions.

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



BACKGROUND

The SFMTA's Business Relocation TDM project was originally intended to provide transportation planning services and materials to businesses to help their employees travel to work in their new location without driving alone, thus setting a more sustainable commute habit from the get-go, rather than trying to change habits after they have already been set. The original allocation approved by the Board included three separate phases of the project:

- Phase 1 Develop Employer Relocation Mode Shift Strategy (\$100,000)
- Phase 2 Implement Strategy and Evaluate Outcomes (\$150,000)
- Phase 3 Implement Refined Strategy and Evaluate Outcomes (\$133,000)

SFMTA has completed most of the Phase 1 tasks, which would be applicable to an amended project scope and include:

- Literature review
- Local outreach
- Development of initial resources
- Creation of website for hosting resources
- Drafting of outreach plan
- Compilation of business contacts for outreach at full project launch

DISCUSSION

The SFMTA's proposed amended scope, schedule and budget (same total cost) for the renamed Business TDM project is described in detail in Attachment 1. The project would utilize similar outreach techniques and provide similar information to encourage employees to commute by sustainable modes rather than driving alone. To get the biggest impact, SFMTA would target office-based business that have 250-1,000 employees, but are still small enough that they likely would benefit from assistance. SFMTA would conduct additional outreach to minority owned businesses and would provide assistance to businesses outside the target size range in response to requests.

The Business TDM project would be delivered primarily through creation and promotion of a website and through outreach via email and direct calls to target businesses. The website will host or link to health information, such as San Francisco Department of Public Health guidance on what business activities and occupancy are currently allowed and all requirements associated with on-site work, as well as transportation information such as service updates and health and safety procedures for Muni and regional transit operators. In addition, the website will host downloadable resources intended for employers to distribute among employees. These materials will cover health and safety procedures for Muni and regional transit operators, rules and best practices for taking transit during the pandemic; and



information on alternate modes such as walking, biking, using scooters, and accessing mobility share options.

The amended scope includes evaluation surveys, to be administered while the project is underway, that will guide continued development of resources and assess the impact of the project on return to work behaviors, including commute mode choice.

Special Conditions. Our recommendation is conditioned on SFMTA including Transportation Authority staff in forums and outreach events with engaged businesses to identify and assess opportunities for strategy improvement and overall value and impact of the project. Applicable events would be identified based on review of the project meeting calendar, which SFMTA would be required to provide to Transportation Authority staff on a regular basis (to be established). We are also conditioning reimbursement of Prop K funds on Transportation Authority approval of project surveys and the evaluation plan.

FINANCIAL IMPACT

The recommended action would not allocate any additional funds beyond those funds previously allocated in May 2018. Sufficient funds are included in the Fiscal Year 2020/21 budget to accommodate the revised cash flow for the project shown in Attachment 1. Furthermore, sufficient funds will be included in the Fiscal Year 2021/22 budget to cover the cash flow distribution for the next fiscal year.

CAC POSITION

The Citizens Advisory Committee considered this item at its March 24, 2021 meeting and unanimously adopted a motion of support for the staff recommendation.

SUPPLEMENTAL MATERIALS

- Attachment 1 - Amendment Request and Staff Recommendations



RESOLUTION APPROVING UP TO \$3,012,914 IN SAN FRANCISCO'S ESTIMATED FISCAL YEAR 2021/22 STATE TRANSIT ASSISTANCE COUNTY BLOCK GRANT FUNDS FOR PARATRANSIT

WHEREAS, In 2018, the Metropolitan Transportation Commission (MTC) established a transit-focused State Transit Assistance (STA) County Block Grant program, combining funds that were previously distributed via a regional paratransit program, a regional Lifeline Transportation Program (LTP), and a northern counties/small transit operators' program; and

WHEREAS, As the Congestion Management Agency (CMA) for San Francisco, the Transportation Authority is responsible for administering San Francisco's STA County Block Grant program; and

WHEREAS, MTC requires that by May 1 of each year, CMAs submit the distribution policy for STA population-based funds; and

WHEREAS, STA funds come from the state sales tax on diesel fuel and have been a volatile source of funding even before the COVID-19 pandemic; and

WHEREAS, Annual STA revenues are projections and annual amounts may be higher or lower when confirmed at the end of each FY following the State's reconciliation of actual revenues generated; and

WHEREAS, MTC's current projection for San Francisco's FY 2021/22 STA County Block Grant funds, total \$3,012,914; and

WHEREAS, Given the uncertainty of forecasting STA revenues, MTC recommends that CMAs program 95% of their county's estimated STA amount; and

WHEREAS, In April 2020, in anticipation of a decline in STA revenues and other revenues upon which the San Francisco Municipal Transportation Agency (SFMTA) relies for its operating budget and having fulfilled prior STA Block Grant



funding commitments, the Transportation Authority Board approved up to \$3,794,000 (the entire estimated amount of San Francisco's FY 2020/21 STA County Block Grant funds at the time, subsequently revised downward to \$3,066,371) to support SFMTA's paratransit program operations, which provides transit trips for seniors, persons with disabilities and others who are unable to use SFMTA's fixed route service; and

WHEREAS, Since the COVID-19 pandemic continues to have significant impacts on the funding sources that SFMTA relies upon for its operating budget, Transportation Authority staff is again recommending programming up to the entire estimated \$3,012,914 in FY 2021/22 STA County Block Grant funds to support SFMTA's paratransit program operations including the Essential Trip Card, a program to help older adults and people with disabilities pay for essential trips in taxis during the COVID-19 pandemic; and

WHEREAS, At its March 24, 2021 meeting the Citizens Advisory Committee considered this item and adopted a motion of support for the staff recommendation; now, therefore be it

RESOLVED, That the Transportation Authority hereby approves up to \$3,012,912 in San Francisco's estimated FY 2021/22 STA County Block Grant funds to support SFMTA's paratransit program operations; and be it further

RESOLVED, That the Executive Director is hereby authorized to communicate this information to the MTC, other relevant agencies, and interested parties.



Memorandum

AGENDA ITEM 7

DATE: March 31, 2021

TO: Transportation Authority Board

FROM: Anna LaForte - Deputy Director for Policy and Programming

SUBJECT: 04/13/21 Board Meeting: Approve Up to \$3,012,914 in San Francisco's Estimated Fiscal Year 2021/22 State Transit Assistance County Block Grant Funds for Paratransit

RECOMMENDATION Information Action

Approve up to \$3,012,914 in San Francisco's Estimated Fiscal Year 2021/22 State Transit Assistance (STA) County Block Grant Funds for Paratransit

SUMMARY

In 2018, the Metropolitan Transportation Commission (MTC) established the STA County Block Grant program to be administered by Congestion Management Agencies (CMAs). MTC used to distribute these funds via a regional paratransit program, a regional Lifeline Transportation Program (LTP), and a northern counties/small transit operators program. For the first cycle (FYs 2018/19 and 2019/20) the Transportation Authority Board directed 40% (\$3.1 million) of San Francisco's share of revenues to the San Francisco Municipal Transportation Agency's (SFMTA's) paratransit program and the remaining 60% (\$4.7 million) to the San Francisco LTP (see Table 1 below). In light of the significant decline in transit fare and other operating revenues due to the COVID-19 pandemic, in April 2020 the Board programmed up to \$3.794 million in FY 2020/21 block grant funds to the SFMTA's paratransit program. We recommend continuing to prioritize SFMTA's paratransit program, including the Essential Trip Card (ETC) program, for San Francisco's estimated share of FY 2021/22 STA block grant funds (\$3,012,914). At the Board meeting, SFMTA staff will provide a brief update on the ETC program.

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



BACKGROUND

STA revenues come from the state sales tax on diesel fuel. It is a flexible transit funding program that can be used for a wide range of transit-related capital and operating purposes. It is also a volatile source of funding, even before the COVID-19 pandemic, given the fluctuations in the price of diesel fuel. In FY 2018/19, MTC began distributing a majority of the region's STA population-based funds to CMAs through a transit-focused STA County Block Grant program. The program allows each county to determine how best to invest in paratransit and other transit operating and capital needs, including providing lifeline transit services. Funds are distributed among the nine Bay Area counties based on the percentage that each county would have received in FY 2018/19 under the former regional programs. MTC requires that by May 1 of each year, CMAs submit the distribution policy for STA population-based funds.

In FYs 2018/19 and 2019/20, San Francisco received a total of \$7.7 million in STA block grant funds. The Board directed \$3.1 million (40%) to the SFMTA for its paratransit program based on the amount that SFMTA would have received under the regional program in FY 2018/19. For the remaining \$4.7 million (60%), the Board approved the SF LTP Cycle 1 program of projects that address transportation needs of low-income populations. Cycle 1 programming is summarized in Table 1 below.

Table 1. San Francisco STA County Block Grant Program FY 2018/19 - FY 2019/20	
Paratransit (operations) (SFMTA)	\$3,141,610
San Francisco Community Health Mobility Navigation Project: Removing Health Care Transportation Barriers for Low Access Neighborhoods (SFMTA)	\$396,300
Continuing Late Night Transit Service to Communities in Need (SFMTA)	\$1,609,700
Elevator Attendant Initiative (BART)	\$2,600,000
Total	\$7,747,610

For FY 2020/21, San Francisco was projected to receive \$3.794 million in FY 2020/21 STA block grant funds as of February 2020. The Board's first programming priority was to backfill then-anticipated lower STA revenues for the three LTP Cycle 1 projects. Fortunately, this was not required because the projects received their full STA allocations from MTC. The second programming priority was the SFMTA's paratransit program operations. As of February 2021, San Francisco is anticipated to receive \$3,066,371 this fiscal year, which is about 19% less than anticipated one year ago. Due to a reduction in service demand from the COVID-19 pandemic, the paratransit program budget has decreased so it will not experience impacts



from the lower than anticipated STA fund estimate. Any additional STA funds would result in a lesser need for SFMTA's operating revenues.

DISCUSSION

As noted above, STA funds tend to be a volatile fund source. In February each year, we receive an estimate of San Francisco's share of revenues for the next funding cycle as well as the current fiscal year, which may be higher or lower when confirmed at the end of each fiscal year following the State's reconciliation of revenues generated. When the Board approved the FY 2020/21 STA County Block Grant to SFMTA's paratransit program in April 2020, we noted that we would return in Spring 2021 to program the FY 2021/22 STA revenues. Additionally, we would assess the current STA revenue forecast and consider the status of SFMTA's operating revenues to develop a recommendation about whether to continue directing all the funds toward SFMTA's paratransit program or to issue a call for projects for San Francisco's LTP. Table 2 below shows the current estimates for San Francisco's FY 2020/21 and 2021/22 STA County Share Block Grant funds.

Table 2. Estimated San Francisco STA County Block Grant Funds FY 2020/21 and 2021/22			
	Funds Recommended (April 2020)	Estimated Funds Available As of February 2021	Increase/ (Decrease)
FY 2020/21 Paratransit (operations) (SFMTA)	up to \$3,794,003	\$3,066,371*	(\$727,632)
FY 2021/22 Paratransit (operations) (SFMTA) (proposed)	N/A	up to \$3,012,914** (proposed)	N/A

* MTC will provide revised county share estimates in Fall 2021.

** Due to the uncertainty of forecasting STA revenues, MTC recommends that CMAs program 95% of their county's estimated STA amount.

In FY 2021/22, San Francisco is projected to receive \$3,012,914, which is lower than previous years and very similar to FY 2020/21 estimates as of February 2021 based on the California Department of Finance's diesel price forecast. We expect to receive actual FY 2020/21 revenues and updated FY 2021/22 revenue estimates in the fall, both of which will likely be higher than current estimates if the price of diesel fuel continues to increase. We recommend programming up to the estimated \$3,012,914 in FY 2021/22 funds to support SFMTA's paratransit program operations including the Essential Trip Card, a program to help older adults and people with disabilities pay for essential trips in taxis during the COVID-19 pandemic.



Next Steps. Following Board approval of this item, we will provide the Board resolution to MTC by its May 1 deadline. We anticipate returning to the Board in Spring 2022 to program the FY 2022/23 STA revenues. At that time, we will assess the current STA revenue forecast and consider the status of SFMTA's operating revenues, as well as other factors to develop a recommendation about whether to continue directing all the funds toward SFMTA's paratransit program or to issue a call for projects for San Francisco's LTP.

FINANCIAL IMPACT

There are no impacts to the Transportation Authority's budget associated with the recommended action.

CAC POSITION

The Citizens Advisory Committee considered this item at its March 24, 2021 meeting and adopted a motion of support for the staff recommendation.

SUPPLEMENTAL MATERIALS

None.



RESOLUTION AMENDING THE ADOPTED FISCAL YEAR 2020/21 BUDGET TO DECREASE REVENUES BY \$16.8 MILLION, DECREASE EXPENDITURES BY \$18.6 MILLION AND DECREASE OTHER FINANCING SOURCES BY \$50.0 MILLION FOR A TOTAL NET DECREASE IN FUND BALANCE OF \$48.2 MILLION

WHEREAS, In September 2020, through approval of Resolution 21-11, the Transportation Authority adopted the Fiscal Year (FY) 2020/21 Annual Budget and Work Program; and

WHEREAS, The Transportation Authority's Fiscal Policy allows for the amendment of the adopted budget during the fiscal year to reflect actual revenues and expenditures incurred; and

WHEREAS, In light of the continued significant impacts of the COVID-19 pandemic, we are recommending revising projected sales tax revenues down by 13.2% from \$93.3 million to \$81.0 million; and

WHEREAS, Revenue and expenditure figures pertaining to several capital projects also need to be updated from the original estimates contained in the adopted FY 2020/21 Budget; and

WHEREAS, Revenue and expenditure revisions are related to the Sales Tax Revenues, Traffic Congestion Mitigation Tax (TNC Tax) Revenues, interest income, program revenues, and several capital project costs reported in the Sales Tax Program (Prop K), Congestion Management Agency Programs, Transportation Fund for Clean Air Program (TFCA), and Treasure Island Mobility Management Agency (TIMMA) Program; and

WHEREAS, Major changes in revenues due to additional funding include the following: Neighborhood Transportation Improvement Projects (District 4 Mobility Improvements Study and Golden Gate Park Sustainable Travel Study), Potrero Yard Modernization, Yerba Buena Island (YBI) West-Side Bridges for Right-of-Way Phase; and major changes in revenues due to decrease in revenue estimates include the following: Sales Tax Revenue, TNC Tax Revenue, interest income, Interstate 80/YBI Interchange Improvement Project - Southgate Road Realignment and Pier E2; and



WHEREAS, Major changes in expenditures due to project delays or delays in project reimbursement requests include the following projects: Prop K San Francisco Municipal Transportation Agency's (SFMTA's) vehicle procurements for light rail vehicles, Interstate 80/YBI Ramps Interchange Improvement Project - Southgate Road Realignment and Pier E2, TIMMA Program, TFCA projects, and TNC Tax SFMTA's Vision Zero Quick-Build Program; and

WHEREAS, Administrative operating costs, debt service costs and other financing sources also need to be updated from the original estimates contained in the adopted FY 2020/21 budget; and

WHEREAS, At its March 24, 2021 meeting, the Citizens Advisory Committee was briefed on the proposed budget amendment and adopted a motion of support for the staff recommendation; now, therefore, be it

RESOLVED, That the Transportation Authority's adopted FY 2020/21 budget is hereby amended to decrease revenues by \$16.8 million, decrease expenditures by \$18.6 million, and decrease other financing sources by \$50.0 million, for a total net decrease in fund balance of \$48.2 million, as shown in Attachment 1.

Attachment:

1. Proposed Fiscal Year 2020/21 Budget Amendment



	Proposed Budget Amendment by Fund							Budget
	Sales Tax Program	Congestion Management Agency Programs	Transportation Fund for Clean Air Program	Registration Fee for Vehicle Transportation Improvements Program	Treasure Island Mobility Management Agency Program	Traffic Congestion Mitigation Tax Program	Amendment Fiscal Year 2020/21	
Revenues:								
Sales Tax Revenues	\$ 81,028,216	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 81,028,216	
Vehicle Registration Fee	-	-	-	5,035,345	-	-	5,035,345	
Traffic Congestion Mitigation Tax	-	-	-	-	-	6,683,182	6,683,182	
Interest Income	665,240	-	1,862	1,814	-	23,144	692,060	
Program Revenues	-	29,840,148	859,117	-	2,233,421	-	32,932,686	
Other Revenues	45,240	-	-	-	-	-	45,240	
Total Revenues	81,738,696	29,840,148	860,979	5,037,159	2,233,421	6,706,326	126,416,729	
Expenditures								
Capital Project Costs	137,752,438	32,278,803	878,256	4,834,049	1,660,300	200,000	177,603,846	
Administrative Operating Costs	6,290,016	4,292,342	47,034	216,589	573,121	95,453	11,514,555	
Debt Service Costs	21,868,117	-	-	-	-	-	21,868,117	
Total Expenditures	165,910,571	36,571,145	925,290	5,050,638	2,233,421	295,453	210,986,518	
Other Financing Sources (Uses):								
Net change in Fund Balance	\$ (40,902,872)	\$ -	\$ (64,311)	\$ (13,479)	\$ -	\$ 6,410,873	\$ (34,569,789)	
Budgetary Fund Balance, as of July 1	\$ 91,257,029	\$ -	\$ 1,067,515	\$ 15,503,808	\$ -	\$ (47,970)	\$ 107,780,382	
Budgetary Fund Balance, as of June 30	\$ 50,354,157	\$ -	\$ 1,003,204	\$ 15,490,329	\$ -	\$ 6,362,903	\$ 73,210,593	



Memorandum

AGENDA ITEM 8

DATE: March 25, 2021

TO: Transportation Authority Board

FROM: Cynthia Fong - Deputy Director for Finance and Administration

SUBJECT: 4/13/21 Board Meeting: Amend the Adopted Fiscal Year 2020/21 Budget to Decrease Revenues by \$16.8 Million, Decrease Expenditures by \$18.6 Million and Decrease Other Financing Sources by \$50.0 Million for a Total Net Decrease in Fund Balance of \$48.2 Million

RECOMMENDATION Information Action

Amend the adopted Fiscal Year (FY) 2020/21 budget to decrease revenues by \$16.8 million, decrease expenditures by \$18.6 million and decrease other financing sources by \$50.0 million for a total net decrease in fund balance of \$48.2 million

SUMMARY

Every year we present the Board with any adjustments to the adopted annual budget. This revision is an opportunity to take stock of changes in revenue trends, recognize grants or other funds that are obtained subsequent to the original approval of the annual budget, and adjust for unforeseen expenditures. In September 2020, through Resolution 21-11, the Board adopted the FY 2020/21 Annual Budget and Work Program.

In light of the continued significant impacts of the COVID-19 pandemic, we are recommending revising projected sales tax revenues down by 13.2% from \$93.3 million to \$81.0 million.

Revenue and expenditure figures pertaining to several capital projects also need to be updated from the original estimates contained in the adopted FY 2020/21 Budget.

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

BACKGROUND

The budget revision is an opportunity for us to revise revenue projections and expenditure line items to reflect new information or requirements identified in the months elapsed since



the adoption of the annual budget. Our Fiscal Policy allows for the amendment of the adopted budget during the fiscal year to reflect actual revenues and expenditures incurred. The revisions typically take place after completion of the annual fiscal audit, which certifies actual expenditures and carryover revenues.

DISCUSSION

The proposed budget amendment reflects a decrease of \$16.8 million in revenues, a decrease of \$18.6 million in expenditures, and a decrease of \$50.0 million in other financing sources for a total net decrease of \$48.2 million in fund balance. These revisions include carryover revenues and expenditures from the prior period. The effect of the amendment on the adopted FY 2020/21 Budget in the aggregate line item format specified in the Fiscal Policy is shown in Attachments 1 and 3. A comparison of revenues and expenditures to prior year actual and adopted budgeted numbers is presented in Attachment 2. The detailed budget explanations by line item with variances over 5% are included in Attachment 4. Detailed budget revisions for the Treasure Island Mobility Management Agency (TIMMA) will be presented as a separate item to the May TIMMA Committee and TIMMA Board.

Revenue and expenditure revisions are related to the decrease in Sales Tax Revenues, Traffic Congestion Mitigation Tax (TNC Tax) Revenues, interest income, program revenues, and several capital project costs reported in the Sales Tax Program (Prop K), Congestion Management Agency Programs, Transportation Fund for Clean Air Program (TFCA), and TIMMA Program. Major changes in revenue and expenditure line items (addressed in Attachment 4) include the following:

- **New Funding**
 - District 4 Mobility Improvements Study
 - Golden Gate Park Sustainable Travel Study
 - Potrero Yard Modernization
 - Yerba Buena Island (YBI) West-Side Bridges for Right-of-Way Phase
- **Decrease in Revenue Estimates**
 - Sales Tax
 - TNC Tax
 - Interest Income
 - Interstate 80/YBI Interchange Improvement Project – Southgate Road Realignment and Pier E2



- **Project Delays or Delayed Reimbursement Requests**

- Prop K San Francisco Municipal Transportation Agency's (SFMTA's) vehicle procurements for light rail vehicles
- Interstate 80/YBI Interchange Improvement Project - Southgate Road Realignment and Pier E2
- TIMMA Program
- TFCA Projects (various projects detailed in Attachment 4)
- TNC Tax SFMTA's Vision Zero Quick-Build Program

Additionally, administrative operating costs, debt service costs and other financing sources need to be updated from the original estimates contained in the adopted FY 2020/21 budget. Due to the reduction of anticipated sales tax revenues for the remainder of the fiscal year, we have conducted a full review of our operating costs and have taken the following steps to reduce expenditures:

- delaying the hiring of a vacant staff position, (but are continuing underway recruitments and filling essential positions);
- reduced administrative operating costs, travel and training, as well as non-essential purchases and contracting; and
- decreased debt service costs due to lower interest expenses related to the Revolving Credit Agreement.

We will continue to monitor revenue streams and coordinate closely with the City and County of San Francisco and sister agencies to assess short, medium, and long-term financial impacts stemming from the pandemic. While we expect our sales tax and other revenues to be significantly affected for the near-term, our current financial position ensures that we can continue to support sponsors' cash needs for a multitude of public works and transit projects across the city.

FINANCIAL IMPACT

The proposed amendment to the FY 2020/21 budget would decrease revenues by \$16.8 million, decrease expenditures by \$18.6 million, and decrease other financing sources by \$50.0 million, for a total net decrease in fund balance of \$48.2 million, as described above.

CAC POSITION

The Citizens Advisory Committee (CAC) considered this item at its March 24, 2021 meeting and unanimously adopted a motion of support for the staff recommendation.



SUPPLEMENTAL MATERIALS

- Attachment 1 - Proposed Budget Amendment
- Attachment 2 - Proposed Budget Amendment - Comparison of Revenues and Expenditures
- Attachment 3 - Proposed Budget Amendment - Line Item Detail
- Attachment 4 -Budget Amendment Explanations

Attachment 2
Proposed Fiscal Year 2020/21 Budget Amendment
Comparison of Revenues and Expenditures

Category	Fiscal Year 2019/20		Fiscal Year 2020/21		Proposed Fiscal Year 2020/21		Variance from	
	Actual		Adopted Budget		Budget Amendment	Fiscal Year 2020/21 Adopted Budget		% Variance
Sales Tax Revenues	\$ 99,268,709		\$ 93,349,705		\$ 81,028,216	\$ (12,321,489)		-13.2%
Vehicle Registration Fee	4,016,473		4,350,644		5,035,345	684,701		15.7%
Traffic Congestion Mitigation Tax	-		7,383,949		6,683,182	(700,767)		-9.5%
Interest Income	2,782,633		775,052		692,060	(82,992)		-10.7%
Program Revenues								
Federal	6,559,443		27,930,948		24,725,310	(3,205,638)		-11.5%
State	117,621		2,510,046		2,475,524	(34,522)		-1.4%
Regional and other	3,935,297		6,916,953		5,731,852	(1,185,101)		-17.1%
Other Revenues	43,631		45,299		45,240	(59)		-0.1%
Total Revenues	116,723,807		143,262,596		126,416,729	(16,845,867)		-11.8%
Capital Project Costs								
Administrative Operating Costs	92,514,661		195,972,411		177,603,846	(18,368,565)		-9.4%
Personnel expenditures	6,613,922		8,734,417		8,607,126	(127,291)		-1.5%
Non-Personnel expenditures	2,671,878		2,948,691		2,907,429	(41,262)		-1.4%
Debt Service Costs	21,772,994		21,952,217		21,868,117	(84,100)		-0.4%
Total Expenditures	123,573,455		229,607,736		210,986,518	(18,621,218)		-8.1%
Other Financing Sources (Uses)	-		100,000,000		50,000,000	(50,000,000)		-50.0%
Net change in Fund Balance	\$ (6,849,648)		\$ 13,654,860		\$ (34,569,789)	\$ (48,224,649)		-353.2%
Budgetary Fund Balance, as of July 1	\$ 114,630,030		\$ 107,780,382		\$ 107,780,382			
Budgetary Fund Balance, as of June 30	\$ 107,780,382		\$ 121,435,242		\$ 73,210,593			



Proposed Budget Amendment by Fund

	Proposed Budget Amendment by Fund										Proposed Fiscal Year 2020/21 Budget Amendment	
	Sales Tax Program	Congestion Management Agency Programs	Transportation Fund for Clean Air Program	Registration Fee for Transportation Improvements Program	Treasure Island Mobility Management Agency Program	Traffic Congestion Mitigation Tax Program						
Revenues:												
Sales Tax Revenues	\$ 81,028,216	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 81,028,216
Vehicle Registration Fee	-	-	-	5,035,345	-	-	-	-	-	-	-	5,035,345
Traffic Congestion Mitigation Tax	-	-	-	-	-	-	-	-	-	6,683,182	-	6,683,182
Interest Income	665,240	-	1,862	1,814	-	-	-	-	-	23,144	-	692,060
Program Revenues												
Federal												
Advanced Transportation and Congestion Management Technologies Deployment	-	-	-	-	733,421	-	-	-	-	-	-	733,421
Highway Bridge Program - I-80/Yerba Buena Island Interchange Improvement	-	20,906,322	-	-	-	-	-	-	-	-	-	20,906,322
Highway Bridge Program - Yerba Buena Island Bridge Structures	-	2,225,134	-	-	-	-	-	-	-	-	-	2,225,134
Presidio Trust - Vehicle Pricing and Fee Collection Feasibility Study	-	7,933	-	-	-	-	-	-	-	-	-	7,933
Surface Transportation Program 3% Revenue and Augmentation	-	852,500	-	-	-	-	-	-	-	-	-	852,500
State												
Planning, Programming & Monitoring SB45 Funds	-	260,000	-	-	-	-	-	-	-	-	-	260,000
Seismic Retrofit Proposition 1B - I/80 YBI Interchange Improvement Project	-	2,160,104	-	-	-	-	-	-	-	-	-	2,160,104
Seismic Retrofit Proposition 1B - Yerba Buena Island Bridge Structures	-	22,940	-	-	-	-	-	-	-	-	-	22,940
Sustainable Communities - School Access Plan	-	32,480	-	-	-	-	-	-	-	-	-	32,480
Regional and other												
BATA - I-80/Yerba Buena Island Interchange Improvement	-	1,932,187	-	-	-	-	-	-	-	-	-	1,932,187
SF Office of Public Finance - Downtown Congestion Pricing Study	-	880,000	-	-	-	-	-	-	-	-	-	880,000
SFPW - Octavia Improvements Study	-	141,485	-	-	-	-	-	-	-	-	-	141,485
SFMTA - Lake Merced Pedestrian Safety	-	4,859	-	-	-	-	-	-	-	-	-	4,859
SFMTA - School Access Plan	-	5,200	-	-	-	-	-	-	-	-	-	5,200
SF Planning - Alemany Interchange Improvement Study	-	1,722	-	-	-	-	-	-	-	-	-	1,722
SF Planning - Housing Element	-	34,715	-	-	-	-	-	-	-	-	-	34,715
SFMTA - Travel Demand Modeling Assistance	-	75,000	-	-	-	-	-	-	-	-	-	75,000
TIDA - Treasure Island Mobility Management Agency	-	-	-	-	1,500,000	-	-	-	-	-	-	1,500,000
TIDA - Yerba Buena Island Interchange Improvement & Bridge Structures	-	265,350	-	-	-	-	-	-	-	-	-	265,350
Vehicle Registration Fee Revenues (TFCA)	-	-	859,117	-	-	-	-	-	-	-	-	859,117
Schmidt Family Foundation/The 11th Hour Project - TNC Research	-	32,217	-	-	-	-	-	-	-	-	-	32,217
Other Revenues												
Sublease of Office Space	-	45,240	-	-	-	-	-	-	-	-	-	45,240
Total Revenues	\$ 81,738,696	\$ 29,840,148	\$ 860,979	\$ 5,037,159	\$ 2,233,421	\$ 6,706,326	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 126,416,729

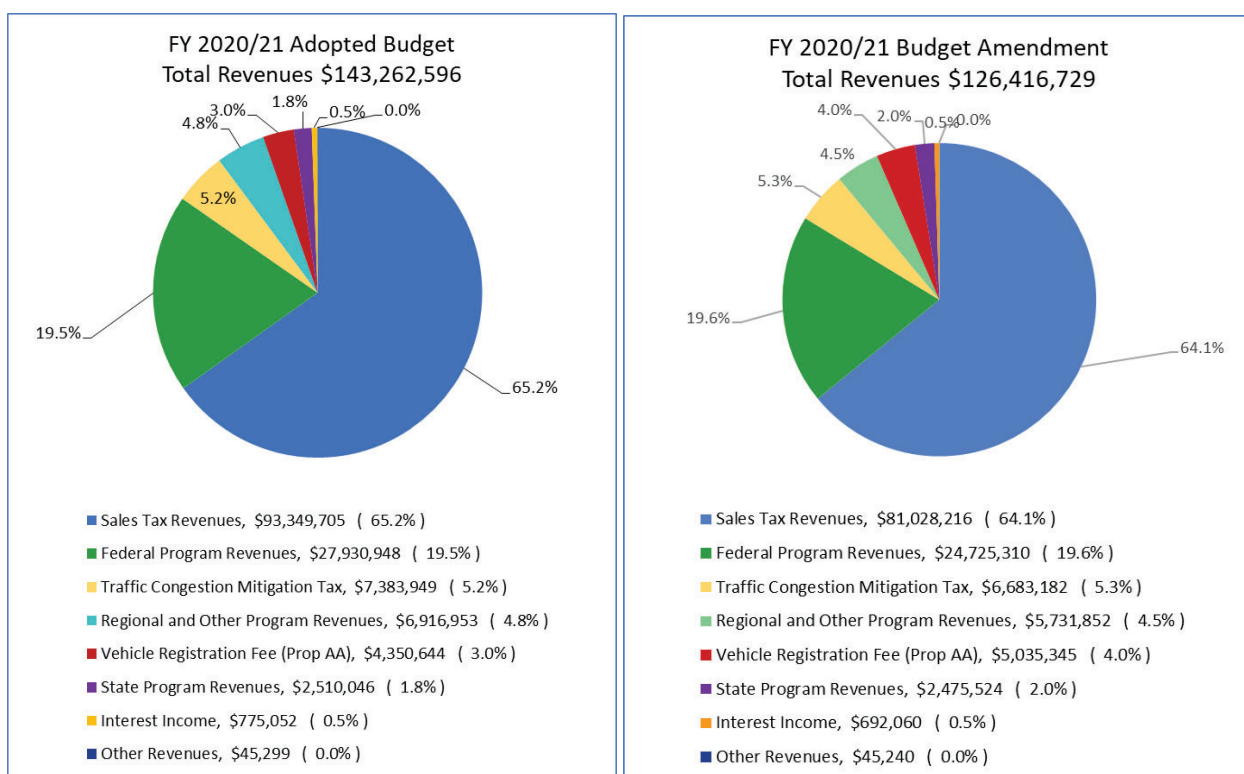


	Proposed Budget Amendment by Fund							Proposed Fiscal Year 2020/21 Budget Amendment
	Sales Tax Program	Congestion Management Agency Programs	Transportation Fund for Clean Air Program	Registration Fee for Vehicle Improvements Program	Treasure Island Mobility Management Agency Program	Traffic Congestion Mitigation Tax Program		
Expenditures:								
Capital Project Costs	\$ 135,000,000	\$ -	\$ 878,256	\$ 4,834,049	\$ -	\$ 200,000	\$ 140,912,305	
Individual Project Grants, Programs & Initiatives	2,752,438	32,278,803	-	-	1,660,300	-	36,691,541	
Technical Professional Services								
Administrative Operating Costs								
Personnel Expenditures								
Salaries	2,252,485	2,863,571	32,066	147,661	360,761	58,258	5,714,802	
Fringe Benefits	1,051,462	1,336,718	14,968	68,928	168,403	27,195	2,667,674	
Pay for Performance	224,650	-	-	-	-	-	224,650	
Non-personnel Expenditures								
Administrative Operations	2,656,919	92,053	-	-	37,757	10,000	2,796,729	
Equipment, Furniture & Fixtures	52,500	-	-	-	-	-	52,500	
Commissioner-Related Expenses	52,000	-	-	-	6,200	-	58,200	
Debt Service Costs								
Fiscal Charges	190,000	-	-	-	-	-	190,000	
Interest Expenses	8,368,117	-	-	-	-	-	8,368,117	
Bond Principal Payment	13,310,000	-	-	-	-	-	13,310,000	
Total Expenditures	\$ 165,910,571	\$ 36,571,145	\$ 925,290	\$ 5,050,638	\$ 2,233,421	\$ 295,453	\$ 210,986,518	
Other Financing Sources (Uses):								
Transfers in - Prop K Match to Grant Funding	-	6,730,997	-	-	-	-	6,730,997	
Transfers out - Prop K Match to Grant Funding	(6,730,997)	-	-	-	-	-	(6,730,997)	
Draw on Revolving Credit Agreement	50,000,000	-	-	-	-	-	50,000,000	
Total Other Financing Sources (Uses)	43,269,003	6,730,997	-	-	-	-	50,000,000	
Net change in Fund Balance	\$ (40,902,872)	\$ -	\$ (64,311)	\$ (13,479)	\$ -	\$ 6,410,873	\$ (34,569,789)	
Budgetary Fund Balance, as of July 1	\$ 91,257,029	\$ -	\$ 1,067,515	\$ 15,503,808	\$ -	\$ (47,970)	\$ 107,780,382	
Budgetary Fund Balance, as of June 30	\$ 50,354,157	\$ -	\$ 1,003,204	\$ 15,490,329	\$ -	\$ 6,362,903	\$ 73,210,593	
Fund Reserved for Program and Operating Contingency	\$ 8,102,822	\$ -	\$ 85,912	\$ 503,535	\$ -	\$ 668,318	\$ 9,360,586	

Attachment 4
Fiscal Year 2020/21 Budget Amendment Explanations

TOTAL REVENUES		
Adopted Budget	Proposed Budget Amendment	Variance
\$143,262,596	\$126,416,729	\$(16,845,867)

The following chart shows the comparative composition of revenues for the proposed amended and adopted Fiscal Year (FY) 2020/21 budget.



Sales Tax Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$93,349,705	\$81,028,216	\$(12,321,489)

Due to anticipated lower revenues based on the impact of COVID-19, we are revising our sales tax revenue projection to decrease by \$12.3 million, or 13.2%, in FY 2020/21 as compared to the adopted budget. The collection of the sales tax revenues through January 2021 remains consistently lower since the 3rd quarter of FY 2019/20, when the stay-at-home orders were fully in effect. Compared to other Bay Area counties (and statewide), San Francisco County has experienced the largest revenue impact from the stay-at-home orders. Because our sales tax revenues are highly reliant upon tourism and the

Attachment 4
Fiscal Year 2020/21 Budget Amendment Explanations

day-time population influx of commuters, both of which remain low, we are projecting a slower recovery from the pandemic than originally assumed in the adopted budget. With the increase in vaccination rates and decline in infection rates, hospitalization rates, and mortality rates, we expect to see sales tax revenues rebounding later in the fiscal year. This projection is aligned with the City Controller's Office's revised projection of its FY 2020/21 sales tax revenue. We will continue to closely monitor San Francisco's health orders and reopening plan and will continue to provide monthly updates of our sales tax revenue collections.

Vehicle Registration Fee Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$4,350,644	\$5,035,345	\$684,701

The Transportation Authority serves as the administrator of Proposition AA or Prop AA, a \$10 annual vehicle registration fee on motor vehicles registered in the City and County of San Francisco, which was passed by San Francisco voters on November 2, 2010. The 30-year expenditure plan continues until May 1, 2041 and prioritizes funds that are restricted to three major categories: 1) Street Repair and Construction, 2) Pedestrian Safety, and 3) Transit Reliability and Mobility Improvements.

Total Vehicle Registration Fee revenues are projected to increase by \$684,701, or 15.7%, in FY 2020/21 as compared to the adopted budget due to FY 2019/20 revenues that were collected in FY 2020/21. This amendment reflects two additional months of revenues, covering February and April 2020, that were collected in October 2020.

Traffic Congestion Mitigation Tax (TNC Tax) Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$7,383,949	\$6,683,182	\$(700,767)

In November 2019, San Francisco voters approved measure Proposition D, also known as the TNC Tax, enabling the City to impose a 1.5% business tax on shared rides and 3.25% business tax on private rides for fares originating in San Francisco and charged by commercial ride-share and driverless-vehicle companies until November 5, 2045. The Transportation Authority receives 50% of the revenues for capital projects that promote users' safety in the public right-of-way in support of the City's Vision Zero policy. The San Francisco Municipal Transportation Agency (SFMTA) receives the other 50% of revenues. The City began collecting TNC Tax revenues on January 1, 2020.

Based on continuous discussions and coordination with the City's Controller's Office and the SFMTA, we anticipate TNC Tax revenues to decrease by \$700,767, or 9.5%, in FY 2020/21 as compared to the adopted budget. This is mainly because revenues continue to be deeply affected by the stay-at-home orders. Also, no revenues were reported at the end of FY 2019/20 due to the timing of the distribution of the TNC Tax funds from the City which administers the collection of the funds. Therefore, this

Attachment 4
Fiscal Year 2020/21 Budget Amendment Explanations

amendment reflects additional revenues covering January through June 2020, that were collected in October 2020.

Interest Income		
Adopted Budget	Proposed Budget Amendment	Variance
\$775,052	\$692,060	\$(82,992)

Most of our investable assets are deposited in the City's Treasury Pool (Pool). The level of our deposits held in the Pool during the year depends on the Prop K capital project reimbursement requests. Our cash balance consists largely of allocated Prop K funds, which are invested until invoices are received and sponsors are reimbursed.

Total Interest Income is projected to decrease by \$82,992, or 10.7%, for FY 2020/21, which is partially due to the decline in interest rates from 1.0% to 0.6% over the past seven months in the Pool. The decrease in interest income is also due to the decrease in TNC Tax revenues as compared to the adopted budget along with decreased interest rates, resulting in less interest earned on the deposits with the anticipated capital expenditures for project sponsors' projects and programs in FY 2020/21.

Federal Program Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$27,930,948	\$24,725,310	\$(3,205,638)

Federal Program Revenues are expected to decrease by \$3.2 million, or 11.5%, as compared to the adopted budget. This is mainly due to a portion of the federal funding for the Southgate Road Realignment Improvements Project, Phase 2 of the Interstate 80/Yerba Buena Island (YBI) Interchange Improvement Project (Southgate) will be deferred to FY 2021/22. Revenue estimates are also updated to reflect new or increased funding for projects. In July 2020, we received the California Department of Transportation's (Caltrans') authorization to proceed for the right-of-way phase of the YBI West-Side Bridges (YBI Bridges) project.

Regional and Other Program Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$6,916,953	\$5,731,852	\$(1,185,101)

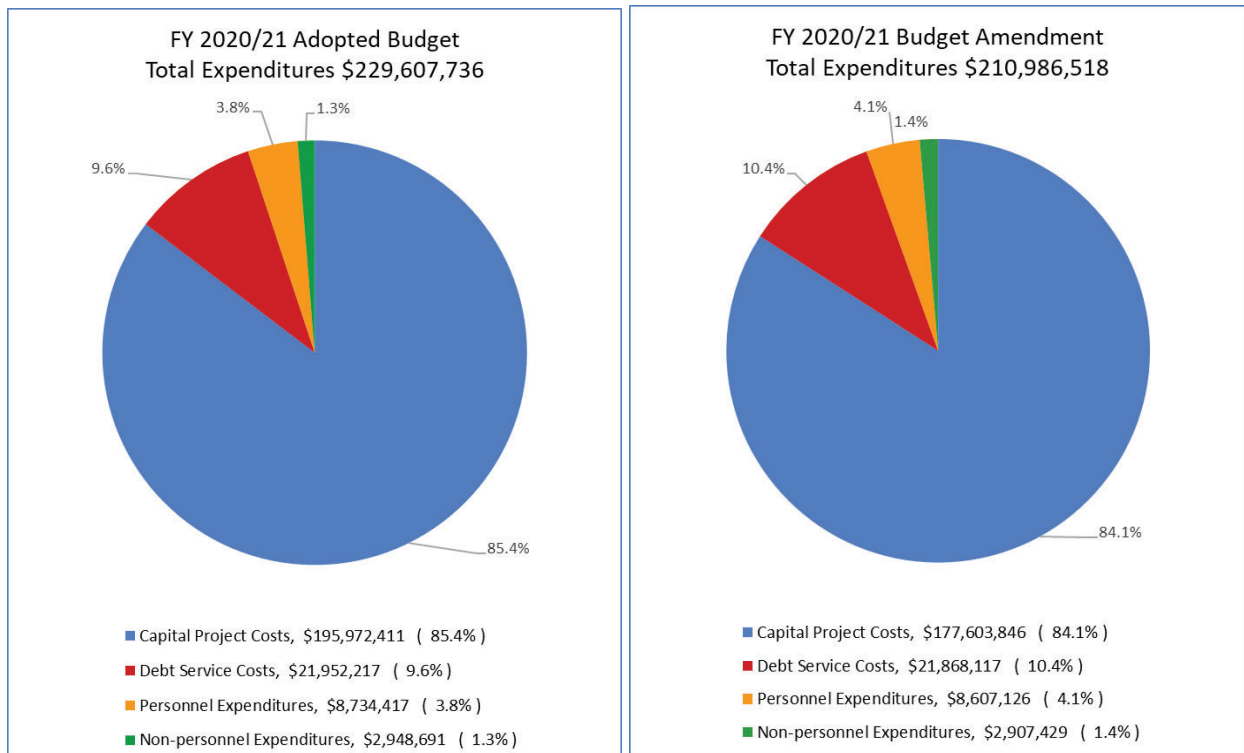
Regional and Other Program Revenues are expected to decrease by \$1.2 million, or 17.1%, as compared to the adopted budget. This is mainly due to delay in work related to the operations and maintenance services on the new YBI Landing and Public Pier (Pier E2) project as well as the Southgate

**Attachment 4
Fiscal Year 2020/21 Budget Amendment Explanations**

project. Due to the COVID-19 pandemic, Pier E2 has not been opened to the public. Therefore, there has been minimal maintenance work required at Pier E2 and may not be opened to the public until May or June 2021. Also, a majority of the budget for the Torpedo Building Rehabilitation work of the Southgate project in FY 2020/21 has been shifted to the next fiscal year due to a shift in schedule. The Treasure Island Development Authority previously expected to have the design and construction phases completed in FY 2020/21. However, a design consultant was not under contract until December 2020. The revised schedule shows design now to be completed in August 2021 with construction to be completed in Fall/Winter 2021.

TOTAL EXPENDITURES		
Adopted Budget	Proposed Budget Amendment	Variance
\$229,607,736	\$210,986,518	\$(18,621,218)

The following chart shows the comparative composition of expenditures for the proposed amended and adopted FY 2020/21 budget.



Attachment 4
Fiscal Year 2020/21 Budget Amendment Explanations

Capital Project Costs		
Adopted Budget	Proposed Budget Amendment	Variance
\$195,972,411	\$177,603,846	\$(18,368,565)

Capital Project Costs in FY 2020/21 are budgeted to decrease from the adopted FY 2020/21 budget by \$18.4 million, or 9.4%, which is primarily due to anticipated lower capital costs from the Prop K program overall, most of which are awarded as grants to agencies like the SFMTA. Costs by Program Fund are detailed below.

Capital Project Costs - Sales Tax Program		
Adopted Budget	Proposed Budget Amendment	Variance
\$151,972,187	\$137,752,438	\$(14,219,749)

Capital Project Costs for the Sales Tax Program Revenues are expected to decrease by \$14.2 million, or 9.4%, as compared to the adopted budget. We developed the FY 2020/21 Prop K Capital Project Costs based on a review of the 2019 Prop K Strategic Plan, as amended, consultation with project sponsors, and evaluation of likely reimbursement needs based on project delivery schedules. In FY 2020/21, we also conducted extensive interagency outreach and coordination to understand how the COVID-19 pandemic has impacted project delivery and reimbursement schedules for Prop K Capital projects. Some of the main drivers of the Prop K Capital Projects costs and our sales tax revenue bond are the SFMTA vehicle procurements, which were completed (i.e. motor coach and trolley coaches) or underway (i.e. light rail vehicles or LRVS) prior to the pandemic. We worked with SFMTA to revise the reimbursement schedule for the LRV procurement to reflect the impacts of the COVID-19 pandemic on delivery of certain subsystems, which experienced delays due to business closures and travel restrictions. The manufacturer has made modifications to the production process and schedule to account for these challenges, and SFMTA is currently evaluating the impacts to the overall project schedule. This change in the reimbursement schedule accounts for the variance between the adopted and proposed amended FY 2020/21 Prop K Capital Project Costs budgeted.

Also, in February 2021, through Resolution 21-30, the Board approved a Prop K appropriation of \$150,000 of which \$61,108 is included in this proposed FY 2020/21 budget amendment, to fund the Potrero Yard Modernization project's planning and environmental phases for redeveloping the bus facility at 2500 Mariposa Street into a modern, efficient bus maintenance facility by 2026.

Attachment 4
Fiscal Year 2020/21 Budget Amendment Explanations

Capital Project Costs - Congestion Management Agency (CMA) Programs		
Adopted Budget	Proposed Budget Amendment	Variance
\$34,532,583	\$32,278,803	\$(2,253,780)

Capital Project Costs for CMA Programs in FY 2020/21 are budgeted to decrease by \$2.3 million, or 6.5%, as compared to the adopted budget. This decrease is mainly due to delayed start of construction activities related to the Southgate project, which started in June 2020 and had progressed slower than anticipated at the beginning, thus deferring \$2.8 million to FY 2021/22. The project is on schedule and construction is expected to be completed by June 2022. In addition, operations and maintenance services on Pier E2 totaling \$375,000 will be shifted to FY 2021/22 due to delay in work as explained above. Also, as mentioned above, Caltrans gave us authorization to proceed with the right-of-way phase of the YBI West-Side Bridges project starting July 2020, increasing capital project costs by \$200,000 in FY 2020/21.

Furthermore, we have initiated and increased Neighborhood Transportation Improvement Plan planning efforts during the year, including District 4 Mobility Improvements Study and Golden Gate Park Sustainable Travel Study. These planning efforts are funded by Prop K appropriations and will increase CMA Capital Project Costs by \$120,000.

Capital Project Costs - TFCA Program		
Adopted Budget	Proposed Budget Amendment	Variance
\$1,328,144	\$878,256	\$(449,888)

Capital Project Costs for the TFCA Program in FY 2020/21 are expected to decrease by \$449,888, or 33.9%, as compared to the adopted budget. For FY 2020/21, we have seen slower than anticipated expenditures primarily from six projects. SFMTA's invoicing has lagged substantially behind construction progress for the Short-Term Bike Parking project, and SFMTA has seen few applications for the Alternative Fuel Taxicab Incentive Program due to fewer taxi operators purchasing new vehicles this fiscal year. San Francisco Environment's Emergency Ride Home grant, which funds the Essential Worker Ride Home program, is expected to incur less cost than budgeted because the average cost per ride has been much less than expected. Grace Cathedral has not yet executed a construction contract with a vendor to move forward with constructing its DC fast charger project. EVgo's Mixed Use Building Fast Charging in San Francisco project faced permitting and construction delays due to the pandemic, but construction has moved forward and we expect the project to fully invoice the funds next fiscal year. Finally, BART's Early Bird Express project has been providing shuttle service. However, invoicing delays from service providers SFMTA and SamTrans have resulted in delayed invoicing by BART.

Attachment 4
Fiscal Year 2020/21 Budget Amendment Explanations

Capital Project Costs - TIMMA		
Adopted Budget	Proposed Budget Amendment	Variance
\$1,928,648	\$1,660,300	\$(268,348)

Capital Project Costs for the TIMMA Program in FY 2020/21 are expected to decrease by \$268,348, or 13.9%, as compared to the adopted budget. This decrease is primarily due to the hold on the toll system design work scope which is not expected to proceed until the toll policies are adopted. Work scope includes issuance of the Request for Proposals for a System Integrator, launch system integration work, and completion of civil engineering design. These activities have not yet initiated due to ongoing analysis and outreach on toll policies but expect those to commence once toll policies are approved.

Capital Project Costs - TNC Tax Program		
Adopted Budget	Proposed Budget Amendment	Variance
\$1,376,800	\$200,000	\$(1,176,800)

Capital Project Costs for the TNC Tax Program in FY 2020/21 are expected to decrease by \$1.2 million, or 85.5%, as compared to the adopted budget. This decrease is due to slower to incur costs than anticipated at the time of allocation in October 2020 for SFMTA's Vision Zero Quick-Build Program. The project is on schedule and has been moving forward using SFMTA's Prop B General Fund. The project is still anticipated to be complete in June 2022, per the schedule in the allocation request.

OTHER FINANCING SOURCES (USES) - DRAW ON REVOLVING CREDIT AGREEMENT		
Adopted Budget	Proposed Budget Amendment	Variance
\$100,000,000	\$50,000,000	\$(50,000,000)

Due to the projected decrease in Sales Tax Revenues, we anticipate the need to drawdown from the Revolving Credit Agreement this fiscal year. The estimated level of sales tax capital expenditures for FY 2020/21 may trigger the need to drawdown up to \$50 million from the Revolving Credit Agreement which is \$50 million less than what we had anticipated during the adoption of the budget. This decrease is mainly due to a higher ending fund balance in FY 2019/20 with capital expenditures coming in lower than anticipated. We will continue to monitor capital spending closely during the remainder of the year through a combination of cash flow needs for allocation reimbursements, progress reports and conversations with project sponsors, particularly our largest grant recipient, the SFMTA.

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RESOLUTION AWARDING A TWO-YEAR PROFESSIONAL SERVICES CONTRACT TO WMH CORPORATION, IN AN AMOUNT OF \$1,700,000, FOR ENGINEERING AND ENVIRONMENTAL CONSULTING SERVICES FOR THE U.S. 101/I-280 MANAGED LANES AND BUS PROJECT, AND AUTHORIZING THE EXECUTIVE DIRECTOR TO NEGOTIATE CONTRACT PAYMENT TERMS AND NON-MATERIAL TERMS AND CONDITIONS

WHEREAS, The Transportation Authority is seeking engineering and environmental consulting services for the U.S.101/I-280 Managed Lanes and Bus Project (Project); and

WHEREAS, The Project will help provide a continuous connection for bus and carpool riders between downtown San Francisco and downtown San Jose, one of the most congested corridors in the Bay Area; and

WHEREAS, The primary goals of the Project are to increase reliability and efficiency of the freeway, reduce emissions, and increase equitable access in the corridor; and

WHEREAS, On February 3, 2020, the Transportation Authority issued a Request for Proposals for preliminary engineering and environmental planning services for the Project, and by the due date of March 4, 2020, received two proposals in response; and

WHEREAS, A multi-agency selection panel comprised of staff from the California Department of Transportation and the Transportation Authority evaluated the proposals based on qualifications and other criteria identified in the Request for Proposals and recommended award of the contract to the highest-ranking firm: WMH Corporation; and

WHEREAS, The Project Report and Environmental Document are required by Caltrans as part of the Project Approval and Environmental Document process, which



will scope and evaluate managed lane options consistent with the Project's goals;
and

WHEREAS, The scope of services will include an advanced traffic study, Phase 1 environmental document, and preliminary engineering; and

WHEREAS, The Transportation Authority paused award of the contract in March of 2020 due to uncertainty surrounding outbreak of the COVID-19 pandemic; and

WHEREAS, Following collaboration with regional partners to advance policies and programs for equitable express lane networks within the Bay Area, and to position this Muni Equity Strategy project for potential near-term funding, Transportation Authority staff is recommending resuming the project and awarding the contract to WMH Corporation; and

WHEREAS, Through outreach, community co-creation and technical development, the project team intends to develop a model managed lanes project featuring integration with public transit and other equity components; and

WHEREAS, The initial contract amount of \$1,700,000 will be funded with Prop K sales tax funds appropriated through Resolution 20-16; and

WHEREAS, The proposed Fiscal Year 2020/21 budget amendment that will be considered for final approval at the Transportation Authority's April 27, 2021 meeting, includes this year's activities and sufficient funds will be included in future budgets to cover the remaining cost of the contract; and

WHEREAS, At its March 24, 2021 meeting, the Citizens Advisory Committee considered the subject contract award and adopted a motion of support for the staff recommendation; now, therefore, be it

RESOLVED, That the Transportation Authority hereby awards a two-year professional services contract to WMH Corporation, in an amount not to exceed \$1,700,000, for engineering and environmental consulting services for the U.S. 101/I-



280 Managed Lanes and Bus Project, and be it further

RESOLVED, That the Executive Director is authorized to negotiate contract payment terms and non-material contract terms and conditions; and be it further

RESOLVED, That for the purposes of this resolution, "non-material" shall mean contract terms and conditions other than provisions related to the overall contract amount, terms of payment, and general scope of services; and be it further

RESOLVED, That notwithstanding the foregoing and any rule or policy of the Transportation Authority to the contrary, the Executive Director is expressly authorized to execute contracts and amendments to contracts that do not cause the total contract value, as approved herein, to be exceeded and that do not expand the general scope of services.



Memorandum

AGENDA ITEM 9

DATE: March 25, 2021
TO: Transportation Authority Board
FROM: Eric Cordoba -Deputy Director for Capital Projects
SUBJECT: 04/13/21 Board Meeting: Award a Two-Year Professional Services Contract to WMH Corporation, in an Amount Not to Exceed \$1,700,000, for Engineering and Environmental Consulting Services for the U.S. 101/I-280 Managed Lanes and Bus Project

<p>RECOMMENDATION <input type="checkbox"/> Information <input checked="" type="checkbox"/> Action</p> <ul style="list-style-type: none"> • Award a two-year professional services contract to WMH Corporation, in an amount not to exceed \$1,700,000, for engineering and environmental consulting services for the U.S. 101/I-280 Managed Lanes and Bus Project • Authorize the Executive Director to negotiate contract payment terms and non-material terms and conditions <p>SUMMARY</p> <p>We are seeking consultant services to provide preliminary engineering and environmental planning for the U.S.101/I-280 Managed Lanes and Bus Project (Project). The Project will help provide a continuous connection for bus and carpool riders between downtown San Francisco and downtown San Jose, one of the most congested corridors in the Bay Area. The primary goals of this project are to increase reliability and efficiency of the freeway, reduce emissions, and increase equitable access in the corridor. We issued a Request for Proposals (RFP) in February, 2020. Award of the contract was paused in March of 2020 due to uncertainty surrounding outbreak of the COVID-19 pandemic. Following collaboration with our regional partners to advance policies and programs for equitable express lane networks within the Bay Area, and to position this Muni Equity Strategy project for potential near-term funding, we are recommending resuming award of the contract to WMH Corporation. Through outreach, community co-creation and technical development, our intent is to develop a model managed lanes project featuring integration with public transit and other equity components.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Fund Allocation <input 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 checked="" type="checkbox"/> Contract/Agreement <input type="checkbox"/> Other: _____
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BACKGROUND

Parts of San Francisco's freeway network are critically congested, but there are many empty seats in cars, vans and buses. Consistent with the Plan Bay Area 2050 Blueprint, the U.S. 101/I-280 Managed Lanes and Bus Project (Project) will develop conceptual designs to prioritize high occupancy vehicles (including Muni and SamTrans buses) traveling the U.S. 101 and I-280 North freeway corridor between downtown San Francisco and San Mateo County, enabling motorists and transit passengers to experience a faster, more reliable trip. Due to the congestion in this corridor, this project is a Muni Equity Strategy priority, for Muni lines 14/X, 8/X and 15X.

The Project is part of a regional network of managed lanes (carpool or express lanes) which are intended to reduce travel time, increase person throughput, and improve reliability for Bay Area motorists and transit riders. The proposed Project, along with planned projects in San Mateo County, will provide a continuous carpool or express lane between the downtowns of San Francisco and San Jose in Santa Clara County.

The current phase of work has been developed based upon our 2018 Freeway Corridor Management Study and 2019 Project Initiation Document. The Project Initiation Document laid out potential carpool and express lane alternatives along the U.S. 101/I-280 corridor within the City and County of San Francisco and San Mateo County. The San Mateo City/County Association of Governments is leading implementation of a 14-mile segment of Express Lanes on U.S. 101 from Redwood City to the I-380 juncture at the San Francisco International Airport.

As part of the prior planning phase, we engaged in outreach to educate stakeholders about the feasibility of different types of managed lanes. Key stakeholders for this outreach effort included elected officials, community groups, merchants, residents, and likely users, especially those who work or live close to the freeways.

DISCUSSION

We are seeking consultant services to assist with engineering and environmental studies to support in the development of a Project Report and Environmental Document. An equity study is advancing separately, per the Board's request, along with a 3-county corridor demand management study called the US 101 Mobility Action Plan.

We paused award of this contract in March of 2020 due to uncertainty surrounding outbreak of the COVID-19 pandemic. Now, traffic levels have returned, in some cases to pre-COVID levels, within the corridor. Following collaboration with our regional partners to advance policies and programs for equitable express lane networks within the Bay Area, and to position Phase 1 of this project for potential near-term funding, we are recommending resuming award of the contract to WMH Corporation.

The project is anticipated to be implemented in two phases.



Phase 1 of the Project would include a northbound high-occupancy vehicle (HOV) lane along I-280 from approximately 23rd Street to the I-280/5th St. touchdown (freeway terminus) as well as two blocks along northbound King Street from 5th Street to 3rd Street. In order to position the project for near-term funding opportunities, we will design and environmentally clear Phase 1 (northbound HOV lane) during Fiscal Year 2021/22. Given the use of entirely existing right-of-way, the proposed level of environmental approval documentation for Phase 1 is anticipated as a Categorical Exemption per CEQA and Categorical Exclusion per NEPA.

Phase 2 of the Project would include a southbound managed lane along King Street, I-280, and U.S. 101, starting from 4th Street and ending at the San Mateo County line. Phase 2 may also include HOV to express lane conversion of the previously constructed northbound lanes and the remaining northbound managed lane gap from the San Mateo County line to 23rd Street. Environmental analysis for Phase 2 covering the remaining portion of the corridor, is expected to be completed by spring 2023, subject to availability of funds. This phase will scope and evaluate managed lane options with the goal of reducing congestion by efficiently prioritizing high-occupancy vehicles within the project corridor.

The scope of work will consist of an advanced Traffic Study, Phase 1 Environmental Document, and Preliminary Engineering (see Attachment 1 for detailed scope).

Procurement Process. We issued an RFP for engineering and environmental consulting services for the U.S. 101/I-280 Express Lanes and Bus Project on February 3, 2020. We hosted a pre-proposal conference at our offices on February 12, which provided opportunities for small businesses and larger firms to meet and form partnerships. 21 firms attended the conference. We took steps to encourage participation from small and disadvantaged business enterprises, including advertising in seven local newspapers: San Francisco Chronicle, San Francisco Examiner, San Francisco Bayview, Small Business Exchange, Nichi Bei, El Reportero, and World Journal. We also distributed the RFP and questions and answers to certified small, disadvantaged, and local businesses; Bay Area and cultural chambers of commerce; and small business councils.

By the due date of March 4, 2020, we received two proposals in response to the RFP. A selection panel comprised of Transportation Authority and the California Department of Transportation (Caltrans) staff evaluated the proposals based on qualifications and other criteria identified in the RFP, including the proposer's understanding of project objectives, technical and management approach, and capabilities and experience. Based on the competitive process defined in the RFP, the panel recommends that the Board award the contract to the highest-ranked firm: WMH Corporation. The WMH Corporation team distinguished itself based on having a better understanding of project objectives and challenges, specifically, around environmental process for Caltrans projects and traffic analysis. We established a Disadvantaged Business Enterprise (DBE) goal of 12.8% for this contract, accepting certifications by the California Unified Certification Program. Proposals from both teams exceeded the DBE goal. The WMH Corporation team includes a combined 18.2% DBE participation from multiple subconsultants, including Rail Surveyors and



Engineers, Inc., and WRECO, both Asian Pacific-owned firms; and Radman Aerial Surveys, Inc., a women-owned firm.

During the past twelve months, we have worked with regional partners to advance policies and programs for equitable express lane networks within the Bay Area. The collaboration has culminated in the Metropolitan Transportation Commission's (MTC) development of an Express Lanes Strategic Plan, MTC's launch of a means based tolling pilot project, creation of an express lane equity program led by the San Mateo County Transportation Authority, and commencement of a data-driven equity study led by the Transportation Authority's modeling team. Through outreach, community co-creation and technical development, our intent is to develop a model managed lanes project featuring integration with public transit and other equity components.

The Executive Director presented resumption of this work earlier this year during presentation of our Annual Report at the January 2021 Board meeting.

FINANCIAL IMPACT

The initial contract amount, not to exceed \$1,700,000 will be funded with Prop K sales tax funds, appropriated through Resolution 20-16. The proposed Fiscal Year 2020/21 budget amendment includes this year's activities and sufficient funds will be included in the Fiscal Year 2021/2022 budget to cover the remaining cost of the contract.

CAC POSITION

The Citizens Advisory Committee (CAC) considered this item at its March 24, 2021 meeting and unanimously adopted a motion of support for the staff recommendation.

SUPPLEMENTAL MATERIALS

- Attachment 1 - Scope of Services

Attachment 1

Scope of Services

Contractor shall provide engineering and environmental consultant services to support the US 101/I-280 Managed Lanes and Bus project (Project). The designated Project limits are from the US 101 San Francisco/San Mateo county line along I-280 to the I-280/King St. touchdown (freeway terminus) extending two blocks along northbound King Street from 5th Street to 3rd Street in San Francisco.

The Purpose and Need of the Project as articulated in the approved Caltrans Project Initiation Document (PID) is as follows:

Purpose: Increase person throughput; Encourage carpooling and transit use; Improve travel time and reliability for HOV and transit users; Minimize degradation to general purpose lanes and local streets; Optimize freeway system management and traffic operations; and Create a facility that extends the benefits of the San Mateo US 101 Express Lane Project into San Francisco.

Need: All lanes on US 101 and I-280 experience congestion resulting in an overall degradation of operations throughout the corridor. Traffic flow is constrained at several bottlenecks where vehicular demand exceeds the capacity of the facility. All users traveling on US 101 and I-280, whether they are in single or multiple occupant vehicles or in buses, experience delays in both the northbound and southbound directions in the AM and PM peak hours, and at other periods during the week.

Specific tasks include: 1) Project Management, 2) Traffic Study, 3) Environmental Document (CEQA/NEPA), and 4) Project Report.

The tasks are detailed below.

Task 1. Project Management

This task provides for ongoing management of the Project team and associated Project controls including monitoring project progress against the baseline schedule and budget. The task will also involve interagency coordination meetings, quality assurance/quality control (QA/QC), Project risk and opportunity management, as well as regular progress updates to the Transportation Authority Citizens Advisory Committee and Board.

- 1.1 Be responsible for organizing and leading team meetings including developing agendas and distributing meeting minutes in work breakdown structure format. Contractor shall also administer the environmental document / project approval phase (PA/ED) including coordination with affected stakeholders and provide QA/QC of deliverables.
- 1.2 Management of the Project budget will include tracking of subconsultant time, invoicing, and development of supporting progress reports in work breakdown structure format.
- 1.3 Development of baseline schedule for design and construction phases will allow the Project team to make informed decisions related to permitting, funding and procurement. Contractor is expected to manage the Project schedule for current and future phases of work.

- 1.4 Assist Transportation Authority staff in development of a project risk register to identify and track potential project threats and opportunities and well as provide advice on required project permitting schedules.

Required Deliverables:

- 1.1 - Meeting Agendas and Minutes. Project Correspondence
- 1.2 - Progress Reports and Invoices
- 1.3 - Baseline Project Schedule and Updates
- 1.4 - Project Risk Register

Task 2. Traffic Study

In this task, Contractor shall collect and analyze pertinent Project information including but not limited to existing and forecasted traffic counts and operations data. Contractor shall conduct traffic operations analysis using previously collected traffic data and traffic forecasts prepared by the Transportation Authority for select Project alternatives and time horizons. Contractor shall use the results of the traffic operations analysis, combined with alternatives cost estimates, to develop preliminary facility revenue projections and provide better understanding of the financial viability of each Project alternative.

- 2.1 Collect supplemental existing traffic data including information related to: travel time/speed information, vehicle occupancy, collision data, and traffic signal timing.
- 2.2 Process traffic forecasting data prepared by the Transportation Authority to develop a Traffic Operations Analysis model using PTV VISSIM or similar software. The model will evaluate the Project alternatives and Federal Highway Administration collision prediction analysis.

Required Deliverables:

- 2.1 - Supplemental Existing Traffic Data
- 2.2 - Traffic Operations Analysis Report (TOAR)

Task 3. Environmental Document

In this task, Contractor shall complete the required studies to receive environmental clearances for both phases of the Project per the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA) requirements.

- 3.1 For Phase 1 of the Project, Contractor shall develop an environmental document to support construction of a northbound HOV facility within the existing shoulder (approximately from the 23rd St. overcrossing to King St./3rd Street intersection).
- 3.2 The first step of the Phase 2 environmental clearance process includes the updating of the goals and purpose and need of the Project, evaluation framework development, initial screening of alternatives, and detailed scoping of the environmental technical studies. This work will inform requirements for both Phase 1 and Phase 2 environmental documents.

3.3 Contractor shall conduct preliminary environmental technical studies to support Phase 2 Planning.

Required Deliverables:

3.1 - *Environmental Document (Phase 1)*

- a) *CEQA/NEPA Categorical Exemption/ Categorical Exclusion*
- b) *Supporting Environmental Technical Reports*

3.2 - *Environmental Scoping*

- a) *Project Purpose and Need / Project Description*
- b) *Environmental Technical Study Work Plans*

3.3 - *Environmental Technical Studies*

- a) *Natural Environmental Study (NES)*
- b) *Initial Site Assessment*

Task 4. Project Report

This task provides for the development and approval of a Caltrans Project Report which will be prepared after preliminary engineering and draft environmental studies have been completed. Contractor shall collect as-built mapping including verification of existing roadway geometry information and aerial topographic mapping. Consultant will develop preliminary geometric engineering designs, toll system concepts, traffic management plans and analysis of the existing structures. The findings of these individual studies will be compiled in a Project Report for approval by Caltrans.

- 4.1 Conduct topographic mapping and mapping of potential utility conflicts to account for any required relocation plans. Collect other relevant Project data such as roadway and structures as-built data in order to develop concept level design alternatives for preliminary screening.
- 4.2 Prepare preliminary engineering designs for select Project alternatives including but not limited to vertical and horizontal alignments, cross sections and design exceptions.
- 4.3 Prepare Project cost estimates for capital investments inclusive of design and construction as well as for proposed operations inclusive of transit and life cycle maintenance.

Required Deliverables:

4.1 - *Data Collection*

- a) *Topographic Mapping*
- b) *As built Drawings*
- c) *Preliminary Right of Way Requirements*
- d) *Utility Mapping*

4.2 - *Preliminary Engineering*

- a) *Design Alternatives*
- b) *Draft Geometric Engineering Drawings*
- c) *Draft Design Standards Decision Report*
- d) *Value Analysis*

4.3 - *Project Cost Estimates*

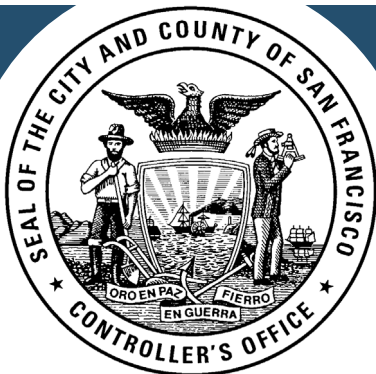
- a) *Capital and Support Expenditures*
- b) *Operating Expenditures*

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SFMTA Capital Programs Audit:

The San Francisco Municipal Transportation Agency
Needs to Improve Accountability and
Collaboration in Its Capital Planning and
Project Delivery Processes

Issued 2/16/2021



CITY & COUNTY OF SAN FRANCISCO

Office of the Controller

City Services Auditor, Audits Division

04/13/2021

San Francisco Municipal Transportation Agency (SFMTA)

- Oversees the public transportation network of the City and County of San Francisco (City).
- Engages in capital construction projects as part of its efforts to improve transit reliability and safety.
- Requires the participation of stakeholders across its various divisions on the capital planning process.

Audit Overview

This is the seventh divisional audit we have conducted at SFMTA.

The audit assessed whether the collaboration, communication, and decision-making framework of SFMTA helps its divisions to effectively plan and deliver capital projects according to scope, on schedule, and within budget. The audit found:

- SFMTA inadequately communicates and collaborates, adding to delays and cost overruns in the four sample projects we reviewed.
- Inadequate processes undermine collaboration, communication, and accountability.
- SFMTA's inadequate use of its data and tools hinders the capital planning and project delivery processes.

Audit Objectives & Scope

To assess the effectiveness of SFMTA's Capital Improvement Program (CIP) development process and the capital project delivery process. Specifically, the audit sought to:

- Assess whether SFMTA's communication, collaboration, and decision-making framework facilitates effective execution of the CIP.
- Determine whether the Construction, Transit, and Finance divisions effectively plan and deliver construction projects in the CIP within scope, schedule, and budget.

The audit selected four capital projects for review, as shown below.

Project	Description	Budget (in millions)	Construction Timeline
Twin Peaks Tunnel Trackway Improvement (Twin Peaks Tunnel)	Replace track structure in Twin Peaks Tunnel between West Portal and old Eureka Valley stations. Perform seismic strengthening and structural repairs.	\$86.9	May 2016 – February 2020
Green Light Rail Center Track Replacement (Green Center)	Replace worn tracks and switches, improve yard lighting, and construct new curb ramps.	\$54.1	January 2013 – December 2017
UCSF Platform and Track Improvement (UCSF Platform)	Reconfigure track alignment, install new transit signals, and construct new boarding platform.	\$51.7	April 2018 – October 2019
5 Fulton Outer Route Fast Track Transit Enhancements (Fulton)	Bus bulbs (curb extensions), new traffic signals replacing stop signs, and pedestrian improvements. Part of Muni Forward Transit Priority projects.	\$6.1	February 2015 – May 2018

What We Did

- Interviewed and surveyed employees in CIP planning and capital projects delivery.
- Assessed project documentation for selected capital projects.
- Analyzed documents relevant to CIP planning, project delivery, and governance.
- Contracted with Cumming Management Group, Inc., to assess cost estimates and preliminary engineering reports for selected capital projects.

Sources of Criteria

- U.S. Government Accountability Office (GAO)
- Government Finance Officers Association (GFOA)
- U.S. Office of Management and Budget (OMB)
- Project Management Institute (PMI)
- Association for the Advancement of Cost Engineering (AACE)
- National Institute of Building Sciences (NIBS)

SFMTA Must Improve Contractor Safety Assessment, Preliminary Engineering Reports, and Change Management to More Effectively Manage Its Construction Project Delivery.

SFMTA should improve its project delivery by:

- Adequately evaluating bidder and contractor safety records.

SFMTA did not consider bidder safety in three of the four sample projects.

Project Reviewed	Bidder Safety Considered?	Awarded Contractor Had Cal/OSHA-Closed Violations	Cal/OSHA Violations From Project?
Green Center	No	No	No
<p><i>In April 2017 CSA issued an audit report on citywide construction safety. In response, SFMTA agreed to incorporate contractor safety records into its contract award process. Bidding for the projects below occurred after April 2017.^b</i></p>			
Twin Peaks Tunnel	Partly. Selection criteria included safety records, but SFMTA did not verify bidders' records with U.S. OSHA's Establishment Search database.	Yes. In August 2011 Cal/OSHA cited contractor for a willful violation, which in September 2015 Cal/OSHA's Appeals Board affirmed as willful and serious.	Yes. Fatal accident: Cal/OSHA cited contractor with serious violations, which the contractor is contesting.
UCSF Platform	No	No	No

SFMTA Must Improve Contractor Safety Assessment, Preliminary Engineering Reports, and Change Management to More Effectively Manage Its Construction Project Delivery.

SFMTA should improve its project delivery by:

- Ensuring preliminary engineering reports (PERs) contain all key information needed to accurately determine a project’s scope, schedule, and budget.

Flaws in Preliminary Engineering Reports may have hindered project delivery.




Flaw in PER	Projects Affected	Possible Impact of Flaw on Project Delivery
Outdated as-built drawings or unknown current conditions	Green Center Twin Peaks Tunnel UCSF Platform	Without updated, clear as-built drawings, it is difficult to accurately define the scope of work. Apparently conflicting information may expose the City to liability in instances of litigation or public scrutiny. Documenting explanations for apparent conflicts demonstrates due diligence in planning.
Missing or understated risks	Green Center Twin Peaks Tunnel UCSF Platform	When life and safety risks, such as the presence of hazardous materials, are omitted from the PER, the project team is more likely to overlook tasks critical to public safety. <i>Hazardous material abatement in the Twin Peaks Tunnel was not fully completed.</i>
Missing or grossly understated allowances	Green Center Twin Peaks Tunnel UCSF Platform	Missing and understated allowances cause inaccurate cost and schedule estimates, which, in turn, can lead to unanticipated service disruptions that harm the public’s perception of Muni, delays that can cause cascading delays to other projects that need the same resources, and cost overruns that take funding away from other planned projects. <i>The Twin Peaks Tunnel Project incurred \$250,000 in excess of the contract allowance for hazardous material abatement, and SFMTA anticipates another \$1-3 million in costs for further work that will also result in additional service disruptions.</i>

SFMTA Must Improve Contractor Safety Assessment, Preliminary Engineering Reports, and Change Management to More Effectively Manage Its Construction Project Delivery.

SFMTA should improve its project delivery by:

- Improving the classification of change orders to identify areas of process improvement.

SFMTA follows two of three leading practices related to change order management.



Leading Practice		Does SFMTA Comply?
Classify types of change orders	Classifying change orders into categories such as <i>changed conditions, unforeseen conditions, owner requests, or design changes for owner use</i> improves understanding of the project. Lessons learned from the data may improve project delivery on similar projects.	
Allow change orders to be approved up to a contingency	Delegating authority to an individual to approve change orders up to a contingency amount ensures critical work can be acted on promptly and not be delayed by a review and authorization process.	
Limit scope changes to early stages of design	In general, the later a given change occurs in the construction process, the more costly it will be.	

SFMTA's Project Prioritization Processes and Inaccurate Cost Estimates Hinder Its Ability to Improve the Effectiveness of Its Capital Programs and Project Delivery.

- SFMTA does not use all functionality available in its strategic prioritization tool, which the agency could use to improve its project prioritization process.

SFMTA does not use all functionality available in Decision Lens to prioritize its capital investments.

		Decision Lens Capability	MTA Use
Data Inputs	}	Stakeholder input based on strategic goals <i>(to produce weight rating)</i>	✓
		Asset condition	✗
		Financial allocation	✗
		Staffing resource allocation	✗
Decision Lens Outputs	}	Project prioritization based on selection criteria	✓
		Tradeoff analysis	✗
		Optimization analysis	✗

 Uses successfully
 Does not use

SFMTA's Project Prioritization Processes and Inaccurate Cost Estimates Hinder Its Ability to Improve the Effectiveness of Its Capital Programs and Project Delivery.

- SFMTA develops inaccurate engineering cost estimates, which hinders its ability to understand its project delivery needs and increases the risk of cost overruns and schedule delays.

SFMTA's preliminary engineering cost estimates are inaccurate.





Project*	SFMTA Estimate (In millions)	Costs Not Included (In millions)
Green Center	\$39.0	\$14.5 – 16.7
Twin Peaks Tunnel	\$41.0	\$28.9 – 31.1
UCSF Platform	\$47.9	\$10.1 – 12.7
Total	\$127.9	\$53.5 – 60.5

Insufficient Accountability and Ineffective Collaboration Contributed to Cost Overruns and Schedule Delays in SFMTA’s Capital Program.

- Inadequate collaboration contributed to project delays, budget overruns, and increased costs in three of four projects tested.
- For example, cross-division collaboration problems contributed to the cancellation of the initial contract for the Twin Peaks Tunnel Project, adding \$35 million in costs.






SFMTA Inadequately Communicates and Collaborates, Adding to Delays and Cost Overruns

Impacts of inadequate communication among SFMTA divisions on project delivery:

<p>Ineffective collaboration through project design and lack of comprehensive reviews . . .</p>  <p style="text-align: center;">↓ <i>contributed to . . .</i></p> <p>the cancellation and subsequent rebidding of the Twin Peaks Tunnel Project contract . . .</p> <p style="text-align: center;">↓ <i>which caused . . .</i></p> <p>rebidding that added \$35 million and 1.2 additional years to project completion.</p>	<p>During the design of the Twin Peaks Tunnel Project, SFMTA identified the need to test for and remove hazardous materials but did not effectively and fully communicate this, so the information . . .</p>  <p style="text-align: center;">↓ <i>was not effectively carried through to the construction phase . . .</i></p> <p> contributing to insufficient testing and incomplete removal of contaminated ballast (material supporting the tracks) ...</p> <p style="text-align: center;">↓ <i>which contributed to . . .</i></p> <p>\$523,000 in change orders. Further, the contractor estimated a potential cost increase of \$3 to \$9 million for 15 to 17 weekends of new tunnel closures to fully replace the ballast.</p>
<p> Although Public Works required collaboration and support from SFMTA to deliver the Fulton Project, including de-energizing Municipal Railway lines, Public Works records show SFMTA did not provide and did not communicate its availability to provide the necessary support . . .</p> <p style="text-align: center;">↓ <i>which caused . . .</i></p> <p style="text-align: center;">SFMTA’s delays in providing previously agreed-upon support that contributed to 620 days (1.7 years) of project delays and \$23,000 in change order costs.</p>	

Insufficient accountability led to poor communication and collaboration, weakening project delivery and oversight.

- SFMTA does not adequately hold itself and its employees accountable for effectively collaborating within and across divisions in capital planning and capital project delivery.
- This ineffective collaboration contributed to cost overruns and schedule delays in three of the four sample projects.

Inadequate processes undermine collaboration, communication, and accountability				
				
<p>Ineffective Employee Performance Evaluation Process to hold senior managers accountable for effective collaboration with no specific examples of growth opportunities or strategies for improving collaboration.</p>	<p>Ineffective Decision-Making by a weakened Transportation Capital Committee due to absenteeism, proxy use, and little or no empowerment or timely information to better inform decision-making.</p>	<p>Inconsistent Design Reviews that left the Construction Division without adequate feedback from the Transit Division during project planning. Change orders due to design omissions or changes cost over \$2 million for the four sample projects.</p>	<p>Critical Safety and Service Issues That Were Unaddressed because of inadequate communication and collaboration across project delivery phases.</p>	<p>Lack of Training to Improve Collaboration for employees who must coordinate their work to plan and execute the capital program.</p>






Surveyed managers and staff:

- 55% disagree that cross-division communication is open and constructive.
- 63% disagree that SFMTA holds employees accountable for communicating openly and constructively.
- 68% disagree that SFMTA holds employees accountable for working collaboratively.

One employee received nearly identical performance appraisals in consecutive years.

SFMTA does not have adequate capital program performance measures to inform decision-makers or target improvement efforts for capital projects.

SFMTA does not track several performance measures that other transportation agencies have recognized as valuable.

Performance Measure	Other Agency That Uses It	Benefit of Tracking – Measure Shows the Agency’s Ability to:	Does SFMTA Track?
% of projects completed on time	Virginia Department of Transportation, <i>VDOT Dashboard</i>	<ul style="list-style-type: none"> Schedule projects realistically Deliver projects on schedule 	
% of projects completed within budget	Virginia Department of Transportation, <i>VDOT Dashboard</i>	<ul style="list-style-type: none"> Establish adequate baseline budgets Deliver projects cost-efficiently 	
Categories of change orders over time across capital projects	California Multi-Agency CIP Benchmarking Study	<ul style="list-style-type: none"> Assess change order categories over time to inform process improvement efforts 	
% difference between total construction cost and original contract award amounts	Missouri Department of Transportation <i>Tracker: Measures of Departmental Performance</i>	<ul style="list-style-type: none"> Control costs by avoiding changes to projects after contract award 	
% of customers who believe completed projects are the right transportation solution	Missouri Department of Transportation <i>Tracker: Measures of Departmental Performance</i>	<ul style="list-style-type: none"> Deliver appropriate transportation solutions based on public perception 	



Tracked



SFMTA reports implementation of measure is in progress



Not tracked

Recommendations for Investing in People:

- Leverage the Performance Plan and Appraisal Report process to hold employees accountable, specifically for effective communication and collaboration.
- Require communication trainings for all employees involved in the capital planning and project delivery processes, including division directors and Transportation Capital Committee members.
- Use performance measures, including variance from estimated budget and schedule, to track the performance of construction project delivery.

Thank you.

Any questions?

You can reach me at mark.p.delarosa@sfgov.org



SFMTA

San Francisco Municipal Transportation Agency

Improving Project Delivery

San Francisco County Transportation Authority

April 13, 2021

Introduction

When the SFMTA struggles to deliver key agency construction projects on time and on budget, it impacts our ability to provide reliable service for our riders and safety to all street users.

- Knowing this, SFMTA has had a **focused effort on improving project delivery** since and internal assessment 2016.
- The assessment led to the development of the 2016 Project Delivery Framework, a project delivery maturity model and the establishment of the SFMTA's Project Management Office (PMO) in 2017.
- Many of the findings of the recent Controller's Audit confirm prior internal findings and some of the actions the SFMTA has already taken.
- Since the PMO's establishment, several the Project Delivery Framework recommendations have been implemented and reforms introduced.
- The goal is to have an **organizational mindset that focuses on investing in the workforce and constant improvement through lessons learned.**
- These **lessons learned have led to recent project successes** in small project delivery, mid-size project delivery and large project delivery including the Vision Zero Quick Build Program/Projects, the Subway Task Force Projects and the Potrero Modernization Project.

2016 Project Delivery Framework

A key objective and action in the SFMTA strategic plan is to implement constant improvements to the project delivery process.

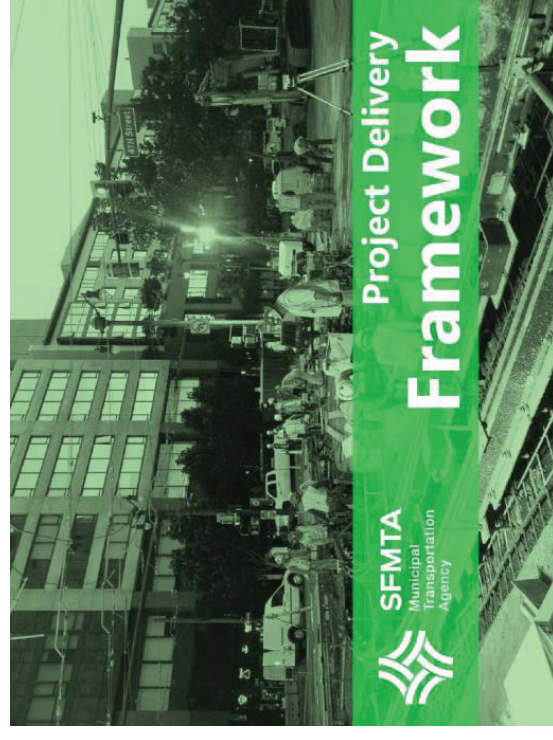
- In 2016, an internal assessment of all of the project delivery arms of the SFMTA was completed including: infrastructure, street, technology, facility and fleet procurement projects.
- Findings from this assessment led to the development of the 2016 Project Delivery Framework, a plan for investment in our project delivery professionals and constant improvement through lessons learned.

Addressing the SFMTA's Project Delivery Challenges

Based on observations, interviews with project delivery staff, and comments collected from the Executive Team, there are a number of challenges at the SFMTA which impact project delivery and can be addressed by the newly created PROJECT DELIVERY ASSESSMENT.

The data collected including the areas of concerns are attached in detail.

February 2016



August 2016

The Agency's transition to an organization that delivers complete curb-to-curb improvements requires various project delivery disciplines to work in concert.

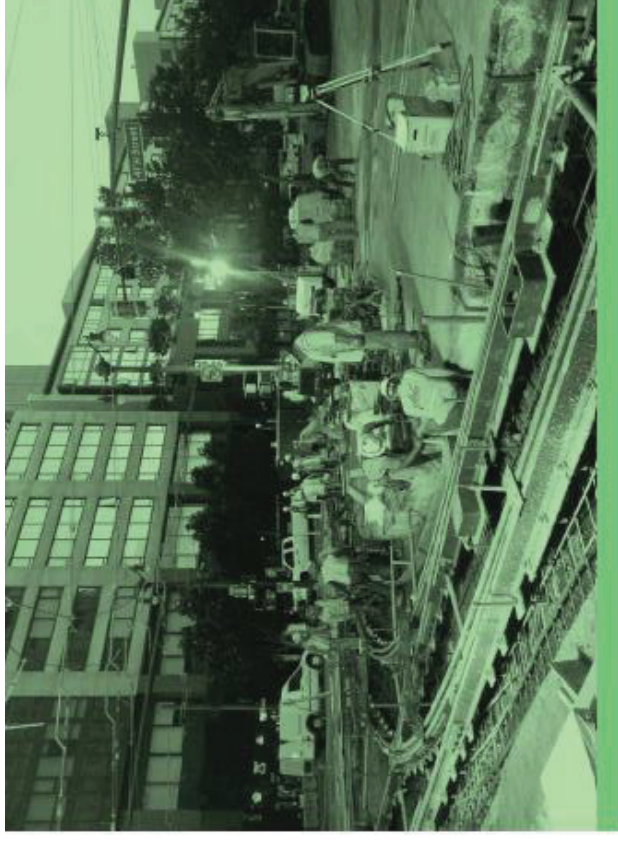
This matrixed delivery organization requires a clear and consistent management structure, effective tools and processes and a governance structure so problems can be resolved, and critical path decisions made. Weaknesses in these areas can lead to project delays, cost increases or project objectives not being achieved.

August 2016

Project Management Office

One of the recommendations of the framework was that the Agency establish a Project Management Office (PMO) to oversee implementation of improvements.

- The PMO includes participants from all delivery arms of the SFMTA.
- Changes in procedure are considered agency-wide and consider best practices in project delivery implementation.
- General Notices set the standards by which all project delivery professionals should ensure adherence to scope, schedule and budget and successful project delivery.



SFMTA Project Delivery Framework **Project Management Office Organization and Implementation**



Adopted
April 14, 2017

April 2017

Project Delivery Framework Implementation

#	Recommendation	Status (as of 3/18/21)
1	Fully implement PDIG Project Delivery Playbook Agency-wide.	In-Process
2	Clearly define and implement the role of Capital Program Manager (CPM) within the SFMTA.	Complete
3	Develop a Project Pipeline Analysis at the Portfolio Level and review with the DOT/Executive Team regularly (recommend quarterly).	In-Process
4	Develop a Project Delivery Staffing Resource Plan and update it regularly (recommend quarterly).	Complete
5	Continue expansion of CPCS to fully integrate Transit Division Projects, and FIT/IT Projects.	Complete
6	Develop an agreed upon standard for data entry in the Capital Project Controls System (CPCS) and implement Agency-wide.	Complete
7	Develop and formalize Project Management Training Program within the SFMTA.	Complete
8	Develop an Apprenticeship program to prepare staff for next level project management roles.	Not Initiated
9	Discuss impacts at project, program and portfolio levels at the Transportation Capital Committee (TCC); add impact to program and SFMTA portfolio as part of recommendations to TCC.	In-Process
10	Develop guidelines and thresholds to guide decisions at the Capital Program and Agency Portfolio levels – i.e. Strategic Plan Impacts, Operational Impacts, Staffing Resources, Divisional Impacts, etc.	In-Process
11	Develop a Communications Plan and process for procedural changes within the Agency.	Complete
12	Establish PDIG Steering Committee as Project Management Oversight Committee/Project Management Office (PMO).	Complete
13	Establish metrics (KPIs) to evaluate SFMTA Project Delivery at the program and portfolio levels.	Complete
14	Conduct an assessment regularly of conformance with the Framework and maturity levels.	In-Process

PMO General Notices Adopted

#	General Notice(s)	Effective Date
2016-001	Management of Project Schedules	December 20, 2016
2017-001	Capital Program Managers	May 15, 2017
2017-002	Management of Project Contingencies	May 15, 2017
2017-003	Programmatic and Early Project Management	August 31, 2017
2017-004	Standardized Data and Automated Reporting	September 4, 2017
2018-001	Interdepartmental Service Agreements	February 5, 2018
2018-002	Construction Mitigation	February 5, 2018
2018-003	Project Cost Estimate Development	October 1, 2018
2019-001	Public Outreach and Notification Requirements	January 1, 2019

PMO Rolling 6-Month Plan through May 2021

ID Initiative

- 1 Develop/implement project closeout process/workflow
- 2 Establish metrics to evaluate project delivery at program and portfolio levels
- 3 Implement contractor reviews per Controller requirement
- 4 Develop tool to be added to standard cost template for cashflow development
- 5 Implement Agencywide project delivery playbook
- 6 Develop project pipeline analysis at the portfolio level
- 7 Develop guidelines/restrictions to guide decisions at capital program and agency portfolio levels
- 8 Project delivery resource management
- 9 Implement TCC member onboarding and annual training
- 10 Conduct an assessment of conformance with framework and maturity levels
- 11 Issue PMO general notice of force account planning and joint-BART Projects

The Agency's transition to an organization that delivers complete curb-to-curb improvements requires various project delivery disciplines to work in concert.

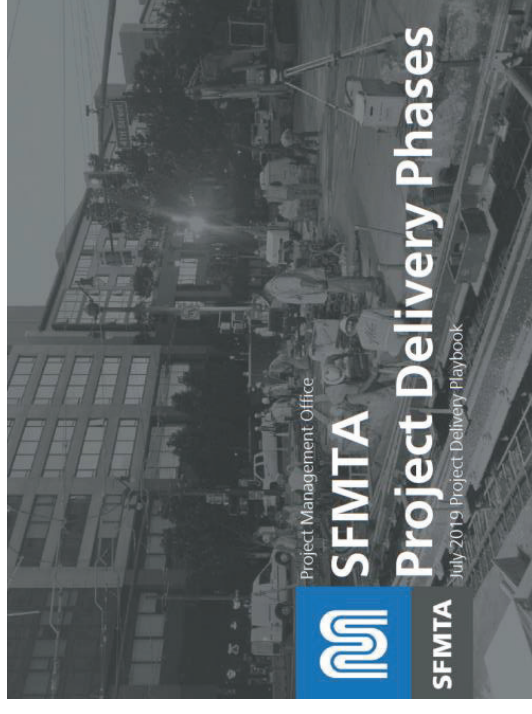
*This matrixed delivery organization requires a clear and consistent management structure, effective **tools and processes** and a governance structure so problems can be resolved, and critical path decisions made. Weaknesses in these areas can lead to project delays, cost increases or project objectives not being achieved.*

August 2016

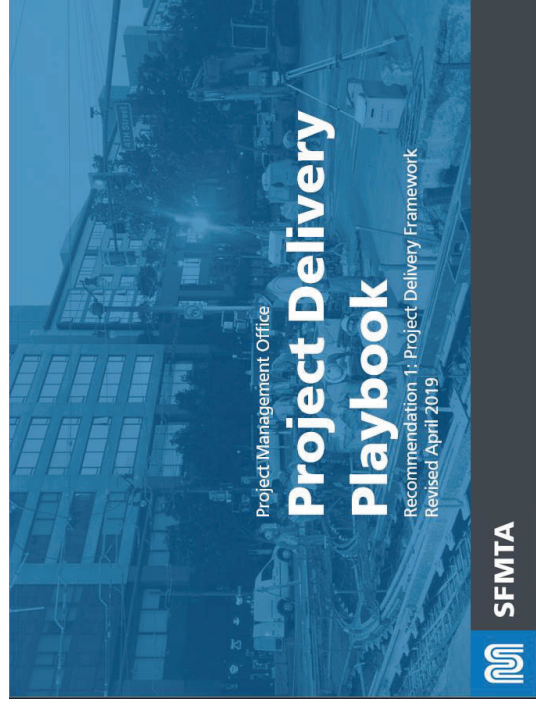
Project Delivery Process – *The Playbook*

A core recommendation of the Project Delivery Framework was to map out standards for the project delivery process.

- SFMTA Project Delivery Phases have been mapped out, to show the various stages, deliverables and requirements.
- This allows for constant review, and refinement, as certain processes need adjustment or additional controls put in place.
- The Project Delivery Playbook is currently in version 2 and will allow anyone starting at the SFMTA to have an initial overview on how to deliver a transportation project in San Francisco no matter the discipline.



July 2019



Draft Still in Revision 2.0

Project Delivery Phases and Required Deliverables

I. INCEPTION

Addition to the Capital Plan and Capital Improvement Program

Identify a Capital Need to include in the 20 Year Plan, and capital project in the 5 Year *Capital Improvement Program and 2 Year Budget

II. PLANNING

Pre-Development Report (PDR)

Further Defining a CIP Line Item as a Project

III. PRELIMINARY ENGINEERING

Preliminary Engineering Report (30% design)

Test Project Feasibility and Engineering it to 30% Design

IV. DETAIL DESIGN

Complete Biddable Package (100% design)

Completing Project Design (100%) Readying it for Construction

V. CONTRACTING

Awarded Construction Contract + Notice to Proceed

Produce Bid Packages, Advertise the project, and Select a Project Contractor

VI. CONSTRUCTION MANGEMENT

Constructed Improvement

Constructing the Project as Designed

VII. ADMINISTRATIVE CLOSURE

Capitalized Asset & Closure Report

Completing all the Paperwork to Close the Project

Considering Various Types of Delivery

	Infrastructure	IT Projects	Fleet Projects
INCEPTION	Addition to the Capital Plan and CIP	Scope, Schedule, Budget & Objective	Objective (Fleet Plan/Service)
PLANNING	Pre-Development Report	Requirements Gathering	Requirements Gathering
PRELIMINARY ENGINEERING	Preliminary Engineering Report	<i>Multiple Drafts of Requirements Document</i>	<i>Final Technical Specifications</i>
DETAIL DESIGN	Complete Biddable Package (100% design)	Design	RFQ/RFP Contract+ NTP
CONTRACTING	Awarded Construction Contract + NTP	Deliver/Test	Vendor Designs
CONSTRUCTION MANAGEMENT	Constructed Improvement	Quality Assurance	Production/ Delivery/Test Acceptance
ADMINISTRATIVE CLOSURE	Capitalized Asset	Closure	Warranty Closure

Phase/Process Review with Full Deliverables

Each phase of work has been clearly identified, in each a detailed process map has been developed, as well as the necessary deliverables, tools, knowledge and support that would be needed for success.

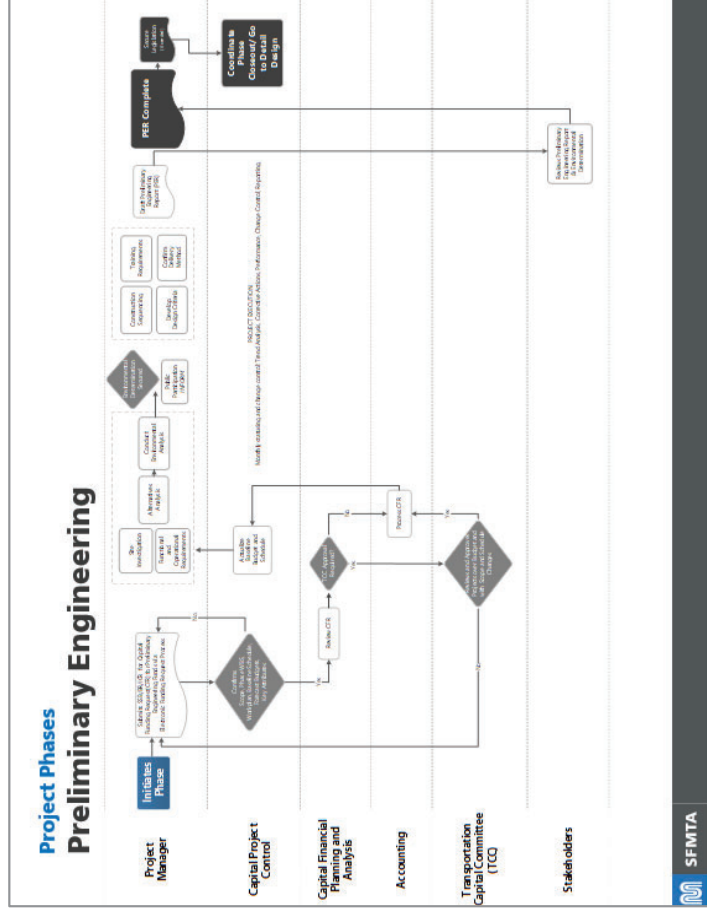
Project Phases

PRELIMINARY ENGINEERING

Deliverables:
Preliminary Engineering Report

With:
Environmental Determination
Legislation (if required)

SFMTA



Tools - Cost Estimate Template


SFMTA

STANDARD COST ESTIMATE

Project: Enter Name Here

ITEM #	ITEM	QTY	UNIT	UNIT COST	TOTAL
1					
2	each		\$	-	\$
3					
4					
5					
6					
7					
				Subtotal:	\$0
				CON Escalation %:	5%
				Subtotal (X):	\$0

	ESTIMATED COST
Base Cost & Contingency	
Estimated Contract Costs	X = \$0
Design Contingency	2% of X = \$0
Construction Contingency	15% of X = \$0
Project Contingency	10% of X = \$0
Project Management	2% of X = \$0
Subtotal:	\$0
Planning	
Public Outreach	0.05% of X = \$0
Architecture/Engineering	1% of X = \$0
Engineering Services	1% of X = \$0
Project Management	1.25% of X = \$0
Subtotal:	\$0
Preliminary Engineering	
Architecture/Engineering	20% of X = \$0
Geotech/Earthquakes	1% of X = \$0
Environmental Services	1.25% of X = \$0
Project Management	3% of X = \$0
Subtotal:	\$0
Detailed Design	
License, Permit & Plan Check	1.75% of X = \$0
Commissioning/Energy Modeling	0.50% of X = \$0
Architecture/Engineering	12.5% of X = \$0
Project Management	1.25% of X = \$0
Subtotal:	\$0
Contracting/Construction Management	
Contracting Costs (City/Any, Con	0.05% of X = \$0
Transit Support (Bus, Field, Insp)	10% of X = \$0
Engineering Support	3% of X = \$0
CM and Inspection Services	12% of X = \$0
Construction Mitigation	1% of X = \$0
Project Management	1.25% of X = \$0
Subtotal:	\$0
TOTAL PROJECT COST (Z):	\$0

In 2018, a standard cost estimating template was developed to support our project delivery professionals generate better initial costs.

- The template requires hard construction costs.
- Adds a tool to include escalation.
- Took the average final costs of a set of completed projects to develop average % for various phases.
- Update and refinement currently in process – revising data and adding additional tool for estimating cashflow needs over the planned project schedule.

Investing in the Workforce

Making tools, providing information and training are key components and priorities for the PMO. Data, tools and trainings are available on internal intranet PMO site. We will expand on these trainings.

Resources include:

- Standards and procedures
- Standard phases and deliverables
- Trainings and information
- Links to Project Controls Systems
- Construction Mitigation Templates



SFMTA Project Management Office (PMO)

PDIG Technical Advisory Committee (TAC)

EDIT LINKS

SFMTA Project Management Office (PMO)

PMO Main Page

PMO Reference Materials

PDIG TAC Materials

PDIG Phases

Recent

EDIT LINKS

Click on any of the boxes to go to the corresponding page.



We are grateful for the insights that the Controller's Office provided us through their audit to further this work.


- Many of the recommendations confirmed our prior findings, and the actions we are taking will move us in the right direction
- We found of particular value the audit's review of inter-divisional collaboration and communication and its impact on project delivery. **This is an area that still needs work.**
- Out of the 16 recommendations included in the audit report, **five have been marked as closed/implemented by the auditors based on actions we have already taken and three have been partially implemented.**

SFMTA Capital Programs Audit Follow-Up

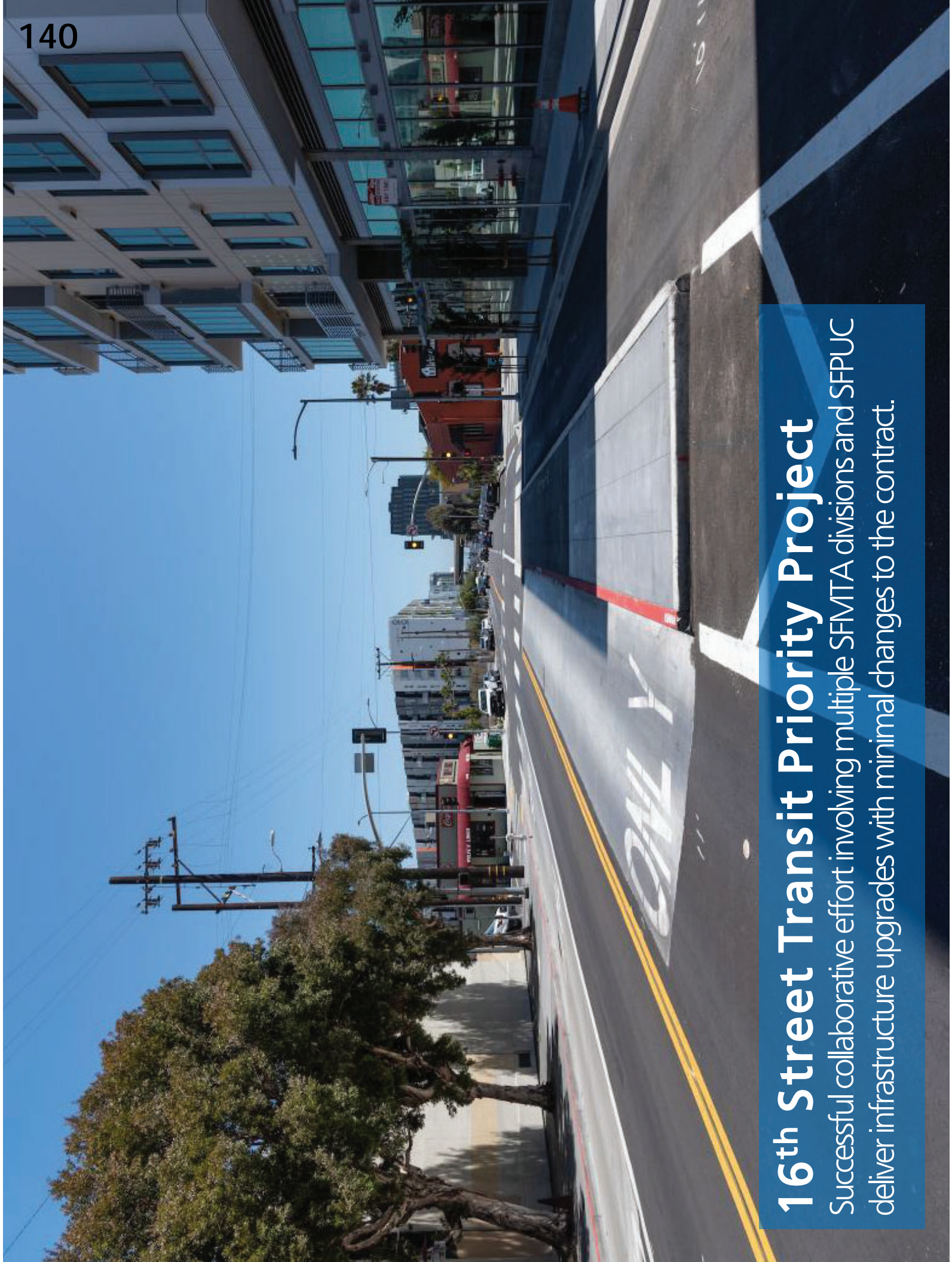
While we work through the findings in the audit, we are also beginning strategic discussions with public and private sector partners to understand best practice approaches to:

- Investing in our **project delivery expertise**, from cost estimating to specialized design to on-site engineering and inspection.
- Driving down costs by **building a better bid environment**, where more contractors compete harder to work for SFMTA contracts.
- Reducing schedule delays by **shifting risk from the agency to our contractors** through new contracting arrangements.

We remain focused on continuous improvement to project delivery within the agency and the work of the audit team and recommendations will help us get there.



There are many areas
of success within our
portfolio of nearly
300 projects.



16th Street Transit Priority Project
Successful collaborative effort involving multiple SFMTA divisions and SFPUC deliver infrastructure upgrades with minimal changes to the contract.



Geary Rapid Project

Delivering this complex complete street project on time and on budget including upgraded traffic signals and streetlights, sidewalk extensions at bus stops and intersection corners, improved median refuges and roadway repaving.



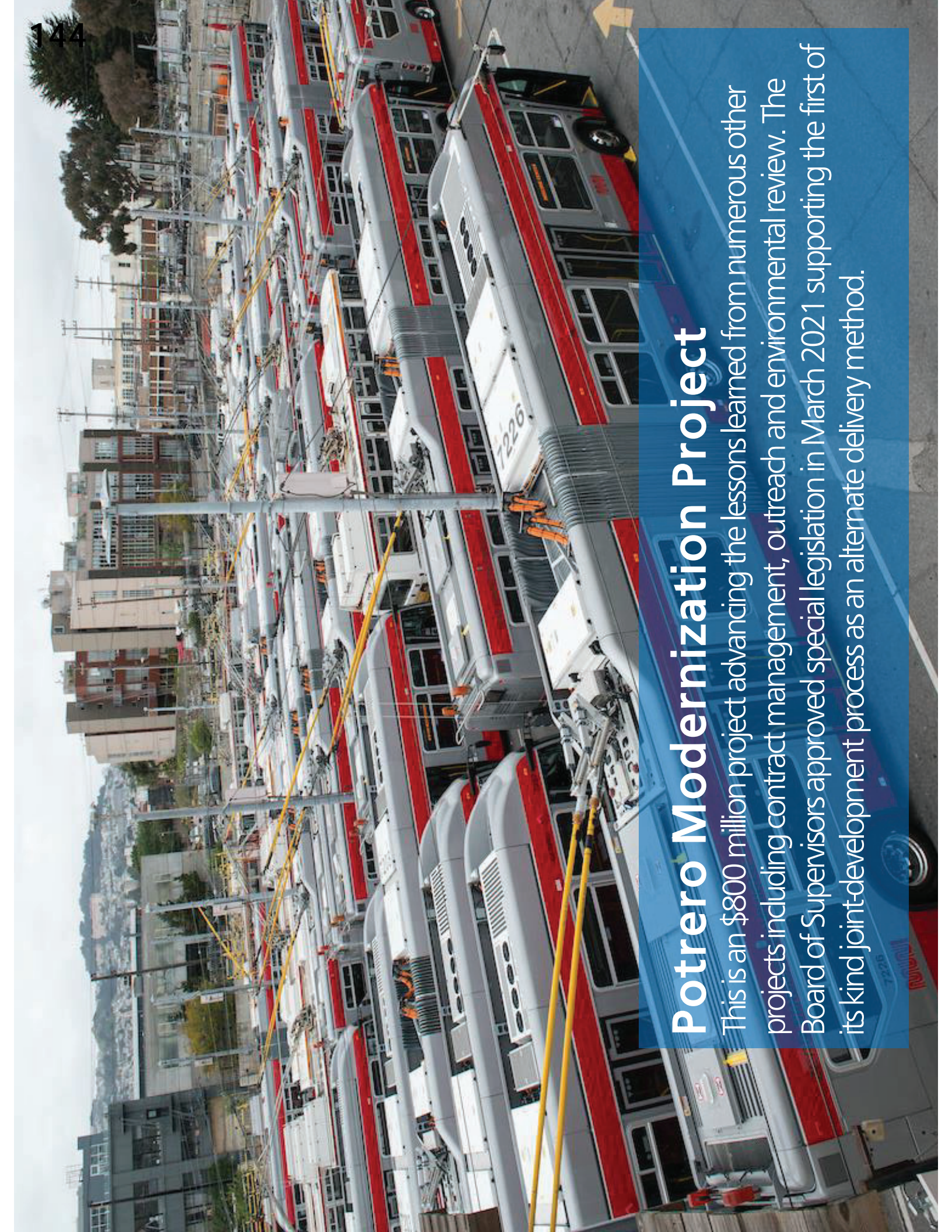
Subway Task Force Projects

The Task Force is modeling new ways of internal collaboration and breaking down internal silos. The projects include an inter-disciplinary approach to fixing the problematic Eureka Curve while minimizing community impact during the COVID-19 subway shutdown.



Vision Zero Quick Build Projects

We have quick-built over 50 miles of our most dangerous streets since 2018. designed to swiftly improve street safety by using low-cost, reversible traffic engineering tools and employing our own in-house designers and skilled trades.



Potrero Modernization Project

This is an \$800 million project advancing the lessons learned from numerous other projects including contract management, outreach and environmental review. The Board of Supervisors approved special legislation in March 2021 supporting the first of its kind joint-development process as an alternate delivery method.



Thank you.

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ConnectSF Draft Transit Strategy March 2021

ConnectSF

connectsf.org

ConnectSF@sfgov.org

ConnectSF Background

ConnectSF is a multi-agency process to build an effective, equitable, and sustainable transportation system for San Francisco's future



San Francisco
County Transportation
Authority



San Francisco
Planning



ConnectSF

About ConnectSF

Phase 1 Vision

ConnectSF Vision



Phase 2 Needs

Statement of Needs

**Transit Corridors
Study**

Streets and
Freeways Study



Phase 3 Policies & Priorities

San Francisco Transportation
Plan

Transportation Element of
SF General Plan

Long Range Planning Goals



Equity



**Economic
Vitality**



**Environmental
Sustainability**



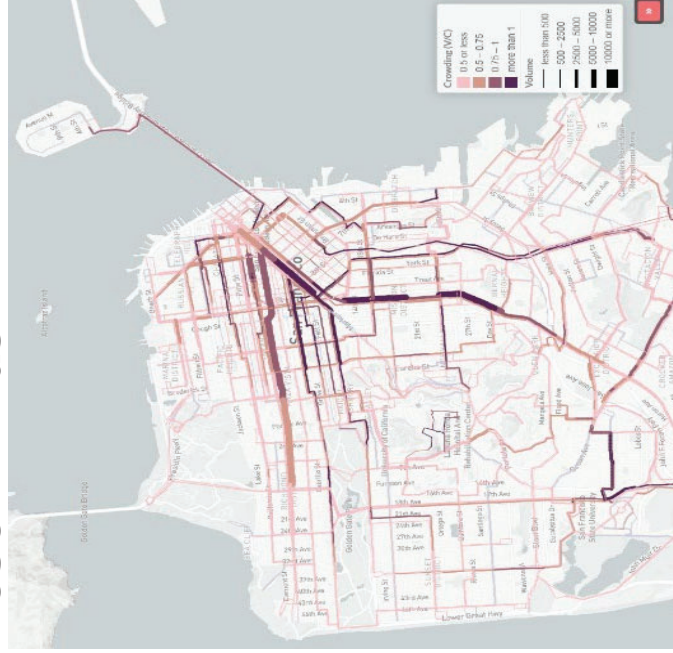
**Safety
and
Livability**



**Accountability
and
Engagement**

Without Investment – Increased Transit Crowding

2050 AM Bus



2050 AM Muni Rail

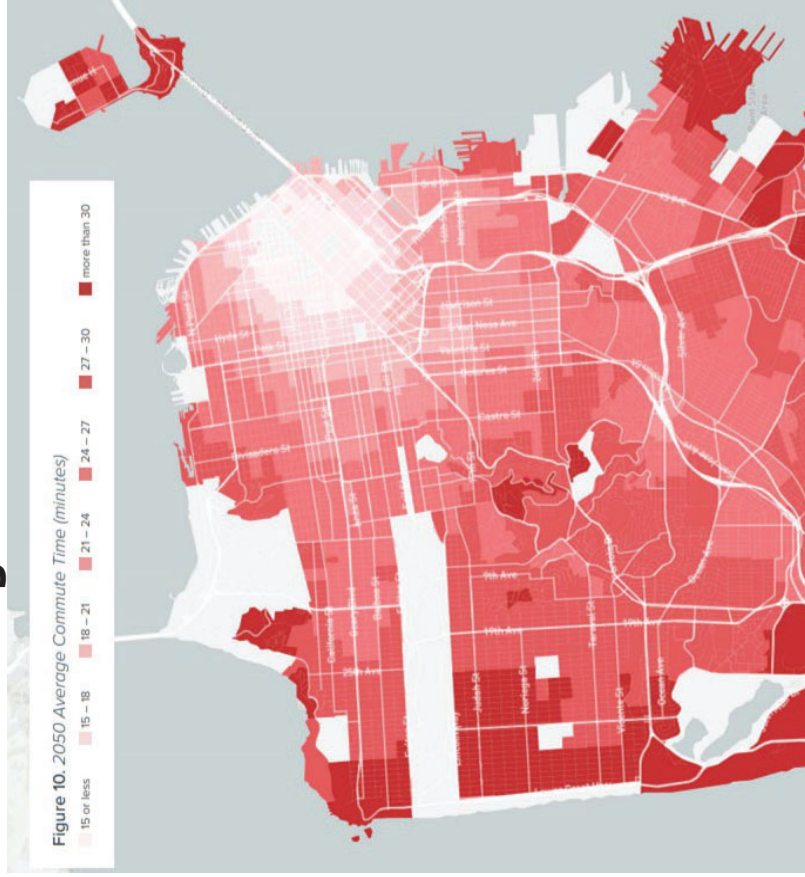


2050 AM Regional Transit

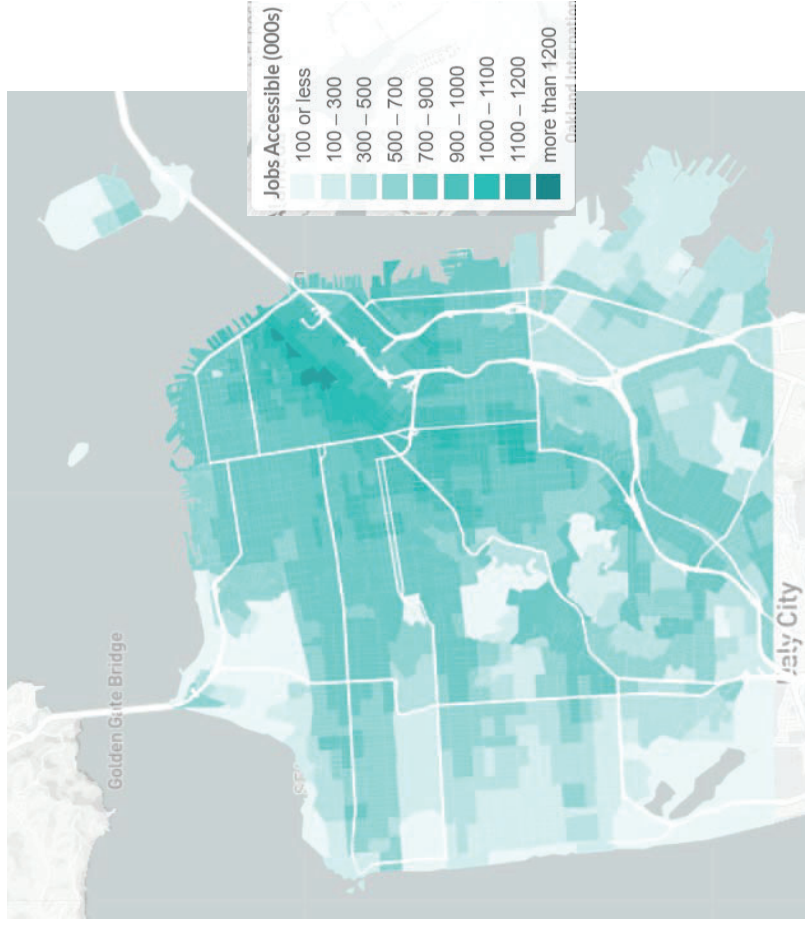


Without Investment – Growing Equity Concerns

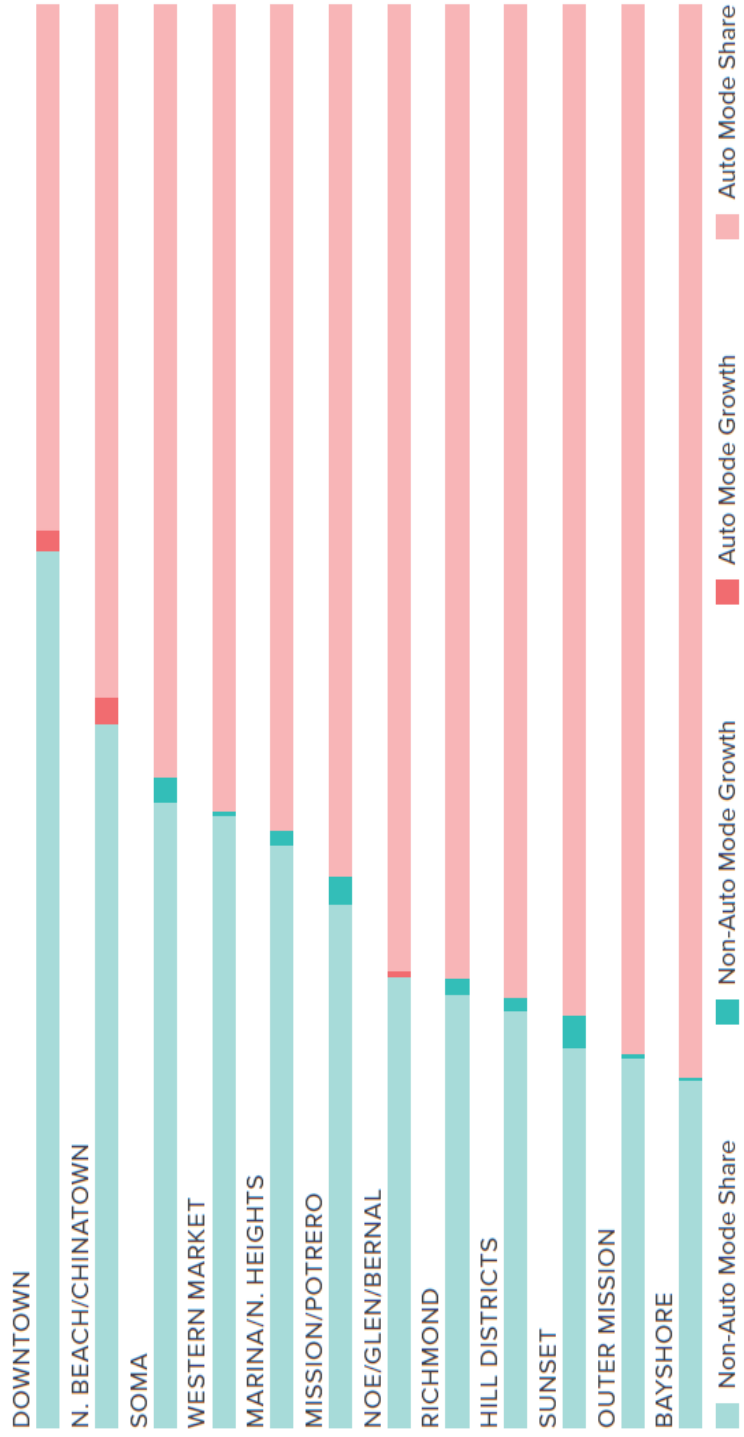
2050 Average Commute Time



2050 Accessible Jobs



Without Investment – Challenges Reducing Auto Mode Share



Transit Investment Strategy

Transit Investment Strategy Goals

- Build upon pandemic recovery efforts
- Prioritize communities and individuals that are most dependent on transit
- Adapt to changing travel needs between neighborhoods, not just to downtown
- Address state of good repair backlog
- Continue to reduce crowding and delay
- Improve connections to the region

Key Recommendations

1

Make the system work better
with maintenance and restoration

2

Build a five-minute network for
reliable transit service citywide

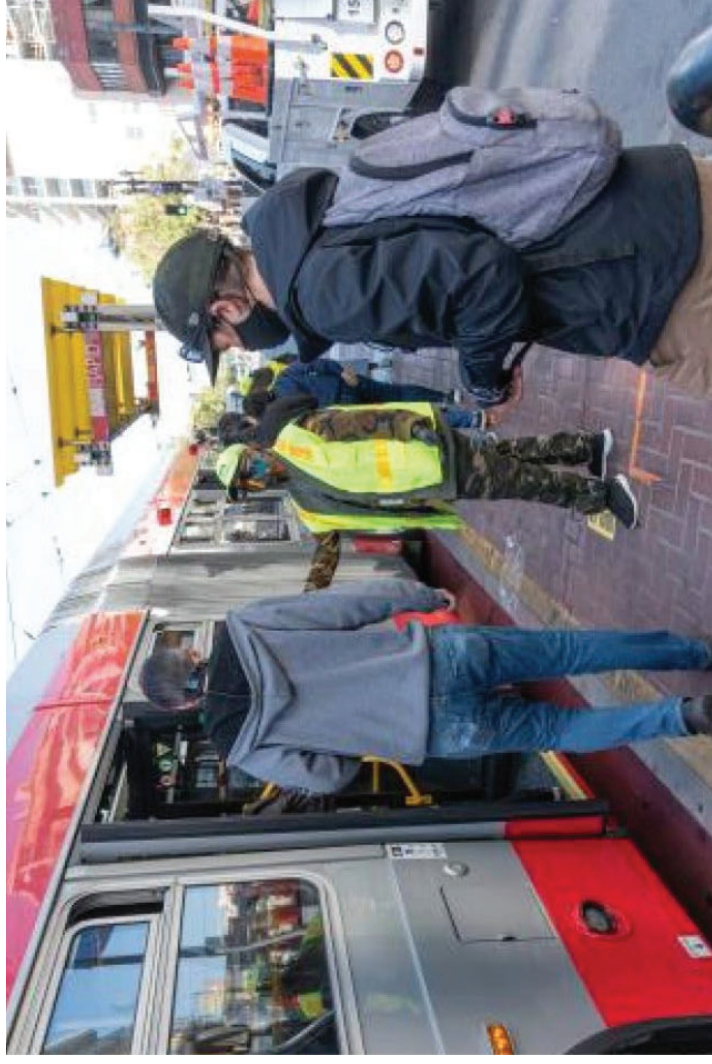
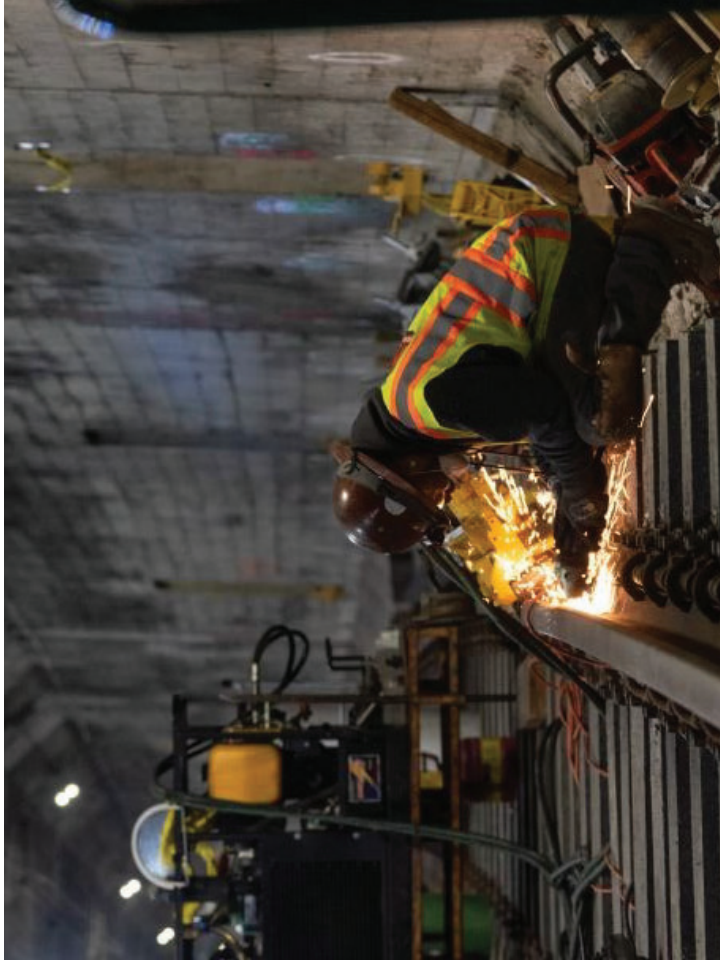
3

Increase speed, reliability, and
capacity for a **modern rail system**

4

Build more rail where bus service
won't be able to meet demand

1 Maintain and Restore our Transit System



2

Preserve Travel Time Savings

When the pandemic began, congestion on our streets vanished, demonstrating the time savings riders get when buses aren't stuck in traffic.



2

Five-Minute Network Improved Speed & Reliability



Street and signal improvements to preserve transit speed and reliability

Fast, frequent service and easy transfers throughout SF
ConnectSF



2 Regional and Local Express Service

Local and regional transit service that runs on freeways and highways

Dedicated express lanes to destinations within San Francisco and throughout the Bay Area

Complements rail and ferries



3

Renew and Modernize Our Rail System

Rebuild our aging rail network

Expand critical infrastructure that keeps trains moving

Longer trains and more reliable service



3

Renew and Modernize Our Rail System



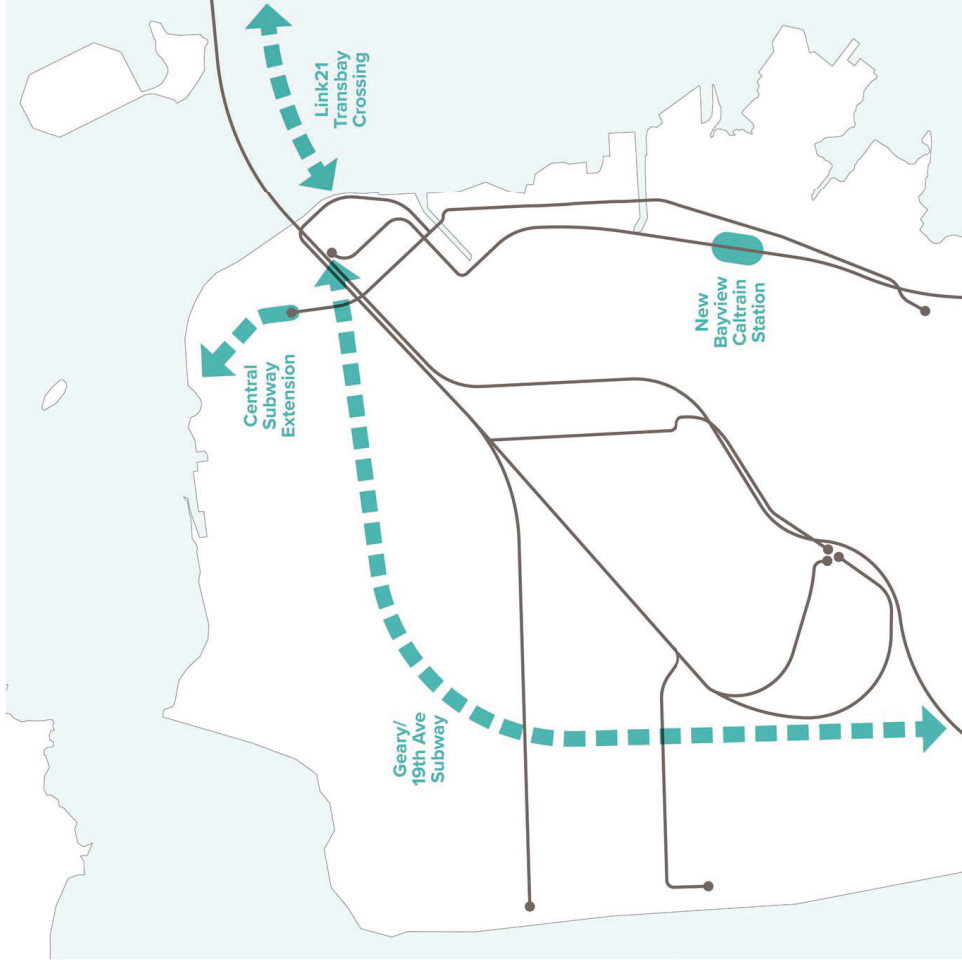
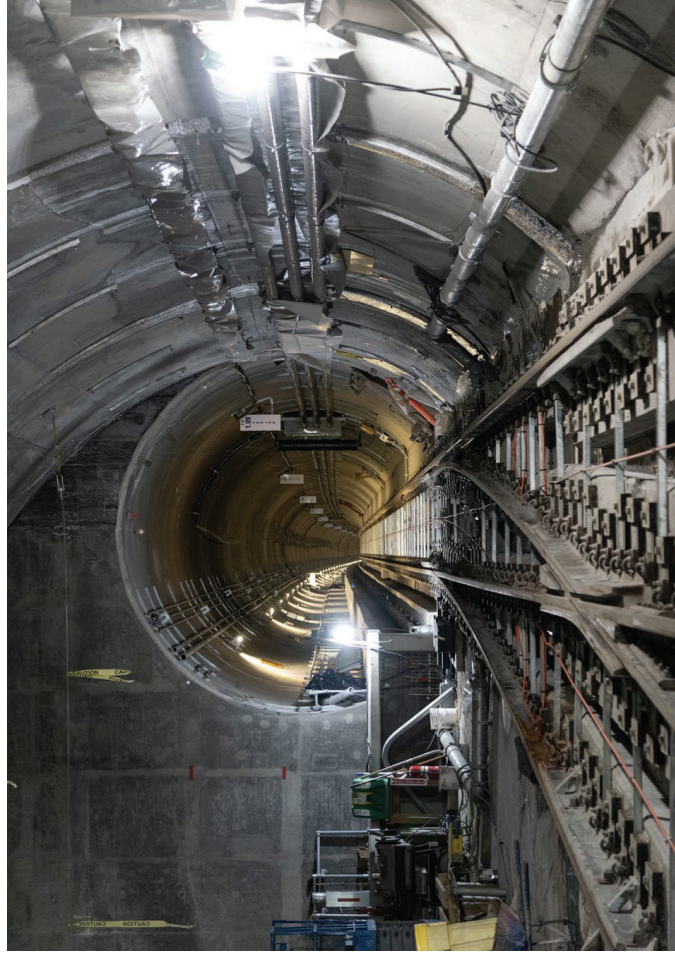
Subway renewal addresses crowding and congestion

Envisions the next generation of subway service for San Francisco

Upgrades such as a new train control system will allow **four-car trains** and **consistent, predictable service**.

4

Build Rail to SF's Busiest Places



ConnectSF

Outreach

- Transit Investment Strategy available at [ConnectSF.org](https://connectsf.org)
 - Available in four languages – English, Chinese, Spanish, and Filipino
- Presentations planned in April
 - Futures Task Force, Community-based organizations
 - Neighborhood and community groups as requested
 - Citywide Workshop April 21, 5 PM <https://connectsf.org/events/>

What's Next?

- Streets and Freeway Strategy – May 2021
 - Includes long term strategy for active transportation, street safety, and freeway investments
- San Francisco Transportation Plan
 - May – introduce expected revenue estimates for constrained (reasonably expected) and visionary (additional sources) plan scenarios
 - July – review policy and investment scenarios based on technical analysis and public input
 - Fall/Winter – complete draft Plan and Vision for review and adoption
- Transportation Element Update
 - Guides policy implementation in City codes and project approvals



Thank you

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Website: connectsf.org

ConnectSF