



AGENDA

San Francisco County Transportation Authority Meeting Notice

Date: Tuesday, March 22, 2022; 10:00 a.m.

Location: Watch SF Cable Channel 26

Watch www.sfgovtv.org

PUBLIC COMMENT CALL-IN: 1 (415) 655-0001; Access Code: 2496 790 4642 # #

To make public comment on an item, when the item is called, dial '*3' to be added to the queue to speak. Do not press *3 again or you will be removed from the queue. When the system says your line is unmuted, the live operator will advise that you will be allowed 2 minutes to speak. When your 2 minutes are up, we will move on to the next caller. Calls will be taken in the order in which they are received.

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

Clerk: Angela Tsao

Remote Access to Information and Participation:

This meeting will be held remotely and will allow for remote public comment pursuant to AB 361, which amended the Brown Act to include Government Code Section 54953(e) and empowers local legislative bodies to convene by teleconferencing technology during a proclaimed state of emergency under the State Emergency Services Act so long as certain conditions are met.

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. 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.

1. Roll Call
2. Chair's Report - **INFORMATION**
3. Executive Director's Report - **INFORMATION**

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4. Approve the Minutes of the March 8, 2022 Meeting - **ACTION*** 5

Consent Agenda

5. **[FINAL APPROVAL]** Appoint Peter Tannen to the Community Advisory Committee - **ACTION*** 15

6. **[FINAL APPROVAL]** Endorse the 2022 Expenditure Plan for the Reauthorization of the Local Sales Tax for Transportation - **ACTION*** 21

7. **[FINAL APPROVAL]** State and Federal Legislation Update - **ACTION*** 69

Support: Assembly Bill (AB) 2197 (Mullin) and AB 2336 (Ting and Friedman)

8. **[FINAL APPROVAL]** Allocate \$1,791,758 in Prop K Funds, with Conditions, and Appropriate \$150,000 for Three Requests - **ACTION*** 75

Projects: SFMTA: Muni Metro Core Capacity Study (\$1,000,000), 20 MPH Speed Limit Reductions (\$750,000), Bike to Work Day 2022 (\$41,758). SFCTA: Muni Metro Core Capacity Study - Project Support and Technical Oversight (\$150,000).

End of Consent Agenda

9. Release \$1,200,000 of Prop K Funds Held on Reserve for the Geary Bus Rapid Transit Phase 2 Conceptual Engineering Report - **ACTION*** 85

10. Amend the Adopted Fiscal Year 2021/22 Budget to Increase Revenues by \$1.7 Million, Decrease Expenditures by \$13.3 Million and Decrease Other Financing Sources by \$50.0 Million for a Total Net Decrease in Fund Balance of \$34.7 Million - **ACTION*** 129

11. San Francisco Municipal Transportation Agency Subway Renewal Overview - **INFORMATION*** 149

Other Items

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.

The meeting proceedings can be viewed live or on demand after the meeting at www.sfgovtv.org. To know the exact cablecast times for weekend viewing, please call SFGovTV at (415) 554-4188 on Friday when the cablecast times have been determined.



**San Francisco
County Transportation
Authority**

Board Meeting Agenda

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The Legislative Chamber (Room 250) and the Committee Room (Room 263) in City Hall are wheelchair accessible. Meetings are real-time captioned and are cablecast open-captioned on SFGovTV, the Government Channel 26. Assistive listening devices for the Legislative Chamber and the Committee Room are available upon request at the Clerk of the Board's Office, Room 244. To request sign language interpreters, readers, large print agendas or other accommodations, please contact the Clerk of the Transportation Authority at (415) 522-4800 or via email at clerk@sfcta.org. Requests made at least 48 hours in advance of the meeting will help to ensure availability. Attendees at all public meetings are reminded that other attendees may be sensitive to various chemical-based products.

If any materials related to an item on this agenda have been distributed to the Board after distribution of the meeting packet, those materials are available for public inspection at the Transportation Authority at 1455 Market Street, Floor 22, San Francisco, CA 94103, during normal office hours.

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.

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance [SF Campaign & Governmental Conduct Code Sec. 2.100] to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 25 Van Ness Avenue, Suite 220, San Francisco, CA 94102; (415) 252-3100; www.sfethics.org.

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San Francisco
County Transportation
Authority



DRAFT MINUTES

San Francisco County Transportation Authority

Tuesday, March 8, 2022

1. Roll Call

Chair Mandelman called the meeting to order at 10:01 a.m.

Present at Roll Call: Commissioners Chan, Haney, Mandelman, Peskin, Ronen, Safai, Stefani, and Walton (8)

Absent at Roll Call: Commissioners Mar (excused, entered during Item 6), Melgar (entered during Item 2), and Preston (entered during Item 3) (3)

2. [Final Approval on First Appearance] Approve the Resolution making findings to allow teleconferenced meetings under California Government Code Section 54953(e) - ACTION

Angela Tsao, Acting Clerk, presented the item.

There was no public comment.

Commissioner Melgar moved to approve the item, seconded by Commissioner Ronen.

The item was approved without objection by the following vote:

Ayes: Commissioners Chan, Haney, Mandelman, Melgar, Peskin, Ronen, Safai, Stefani, and Walton (9)

Absent: Commissioners Mar and Preston (2)

3. Community Advisory Committee Report - INFORMATION

John Larson, Chair to the Community Advisory Committee (CAC), presented the report on the virtual meeting held on February 23. He noted that although a modest request, the Bike to Work Day portion of the Prop K allocation item on the Board's agenda was a significant part of CAC members' focus, explaining that members wanted to ensure that energizer stations were throughout all 11 districts and wanted the scope of the event to be broadened to biking to wherever/everywhere to appeal to non-commute bicyclists as well. CAC Chair Larson also commented that during the discussion of the item, CAC members unanimously agreed with one member's suggestion that all allocation requests include equity benefits and impacts of proposed projects as part of the regular presentations rather than CAC members having to raise those issues themselves.

CAC Chair Larson also commented that during the Climate Action Plan item presentation, CAC members were interested in the component parts of the plan and how they interacted to achieve the climate goals like the influence of carbon sequestering through public lands and street trees, impacts of the walking and biking to reduce greenhouse emissions, and green transit that included non-fossil fuel



ferries. CAC Chair Larson continued his report by saying that during an informational update on the 2022 Expenditure Plan for the half-cent sales tax, the CAC was particularly pleased to see the Neighborhood Transportation Investment Program codified in the Transportation System Development and Management category, as well two new programs: Equity Priority Transportation Program (to fund projects focused on equity priority and disadvantaged communities) and the Development Oriented Transportation Program (for planned growth and density in neglected areas of the cities such as the West Side). CAC Chair Larson concluded by thanking CAC member Rosa Chen for serving on the Expenditure Plan Advisory Committee and the hard work devoted to putting together this comprehensive and inclusive plan together.

There was no public comment.

4. Approve the Minutes of the February 15, 2022 Meeting - ACTION

There was no public comment.

Commissioner Melgar moved to approve the minutes, seconded by Chair Mandelman.

The minutes were approved without objection by the following vote:

Ayes: Commissioners Chan, Haney, Mandelman, Melgar, Peskin, Preston, Safai, Stefani, and Walton (9)

Absent: Commissioners Mar and Ronen (2)

5. Appoint One Member to the Community Advisory Committee - ACTION

Mike Pickford, Senior Transportation Planner, presented the item per the staff memorandum.

Peter Tannen, incumbent and District 8 applicant, spoke to his interests and qualifications in seeking reappointment to the Community Advisory Committee (CAC).

Chair Mandelman said he would like to nominate Peter Tannen to continue representing District 8 and expressed gratitude for Mr. Tannen's 14 years of service, commitment, and valued transportation expertise and knowledge that he brought to the CAC.

There was no public comment.

Chair Mandelman made a motion to appoint Peter Tannen to the CAC, seconded by Commissioner Preston.

The item was approved without objection by the following vote:

Ayes: Commissioners Chan, Haney, Mandelman, Melgar, Peskin, Preston, Safai, Stefani, and Walton (9)

Absent: Commissioners Mar and Ronen (2)

6. Endorse the 2022 Expenditure Plan for the Reauthorization of the Local Sales Tax for Transportation- ACTION

Michelle Beaulieu, Principal Transportation Planner, presented the item per the staff



memorandum.

Amandeep Jawa, Expenditure Plan Advisory Committee (EPAC) Chair, thanked EPAC members for their work on the draft Expenditure Plan and said they had been thoughtful throughout the process. He also thanked staff for their hard work in helping EPAC members understand complex information and understand the process. He thanked sponsor agency representatives for providing information on their project needs and being available to answer questions. He said it was a lot of work but was grateful for everyone's participation and was proud of the result. He said it was likely that no one got exactly what they wanted in the Expenditure Plan, but that meant the EPAC did their job well, developing an Expenditure Plan with broad appeal.

BART Director Bevan Dufty, Board Director referenced BART's letter from General Manager Bob Powers indicating BART's strong support for the Expenditure Plan and this measure. He thanked the Commissioners for meeting with BART Board Directors and staff over the last six months and expressed appreciation for the increase in BART's programs in the Expenditure Plan. He said there was a better understanding of what BART was doing for San Francisco, including the Core Capacity program to increase the number of trains coming into the city. He said he was impressed with participation from the EPAC and their passion for mobility in San Francisco and the dedication they showed and said he believed the measure would be supported because of this. He also thanked Transportation Authority staff for their work throughout the process. Director Dufty said in addition to Core Capacity, next generation fare gates and modernizing elevators would also be possible because of the Expenditure Plan. He said BART had established an ambassador program, hired crisis intervention specialists, reopened bathrooms, and they understand what BART should be doing, including serving those who are transit-dependent and who made up 50% of their ridership during the pandemic. He thanked Chair Mandelman for his time and dedication throughout the Expenditure Plan development process.

Commissioner Melgar thanked staff for the democratic and community-driven process and EPAC Chair Jawa for serving on the EPAC. She thanked Joan Van Rijn for her advocacy on the EPAC on behalf of seniors and people with disabilities which resulted in an increase in paratransit funding being proposed. She expressed gratitude for the special attention paid to transportation issues on the west side, especially recommendations emerging from the ConnectSF effort and issues connecting the west side to the rest of city and the regional transportation network. She also thanked BART for their engagement with her office, including issues related to connectivity of the Daly City BART station and Balboa Park BART station to the rest of network and how that was reflected in the Expenditure Plan.

Commissioner Preston echoed the gratitude given and thanked Chair Mandelman and Chair Jawa for their work. He said he wanted to give a special thanks to Majeid Crawford, District 5 representative on the EPAC and Executive Director of the New Community Leadership Foundation. He said Mr. Crawford had been an important advocate on the EPAC, putting a lot of time and energy toward the committee and pushing the EPAC in the direction of increasing the commitment to equity which was reflected in the Expenditure Plan.

Chair Mandelman thanked Aaron Leifer, District 8 representative on the EPAC.



During public comment, Brian Haagsman, Vision Zero Organizer with Walk San Francisco (WalkSF), said WalkSF participated on the EPAC and supports the Expenditure Plan. He said WalkSF fought to increase safe streets funding for vulnerable road users, including guaranteed Safe Routes to School funding to improve infrastructure around schools and provide education to shift trips to walking, biking, and taking transit. He said the top 3 reasons parents drove their children to school were all related to dangerous streets and intersections near schools and programs to help with infrastructure improvements were needed. He said the proposed funding was still not enough to address needed Vision Zero safety improvements. He said WalkSF would continue to advocate for other sources of funding to keep true on the promise of Vision Zero and thanked the Board.

Zack Deutsch-Gross, Advocacy Director with San Francisco Transit Riders and member of the EPAC, encouraged the Board to endorse the Expenditure Plan as proposed and urged the Board of Supervisors to put it on the November 2022 ballot. He said he was impressed with the process and outcome which emphasized a more equitable and accessible transit system that riders need by maintaining and enhancing Muni, BART, ferry and Caltrain services and ensures that projects with documented support from disadvantaged populations including those harmed by past transportation policies would receive additional priority. He said that while sales taxes were regressive, this was an existing tax, not a new one, and investments were progressive. He expressed support for a ballot measure and the Expenditure Plan as proposed.

Christopher White, Director of Programs with San Francisco Bicycle Coalition and member of the EPAC, expressed support for endorsement of the Expenditure Plan and sending it to voters in November 2022. He said the process was robust and thoughtful, and the EPAC considered hours of presentations from agency representatives, public comment, hundreds of pages of information compiled by staff, and heard and weighed reports of the concurrent community outreach process. He said all of this was incorporated and the Expenditure Plan represented a careful balance of needs in the city. He said it would help transportation agencies recover from the pandemic while adequately funding street safety improvements that would help achieve Vision Zero goals, although more progress could be made elsewhere. He said the Expenditure Plan builds in equity including more funding for paratransit, the Equity Priority Neighborhood Program, and equity-focused prioritization measures including communities impacted by displacement in San Francisco. He urged the Board to move the Expenditure Plan forward and expressed appreciation for staff.

Bill Blackwell, with Plumbers and Pipefitters Local 38 San Francisco, spoke in support of the Expenditure Plan. He said plans like these give their 420 out of work members some hope that recovery is coming and would appreciate the Board's support of the plan.

BART Director Janice Li spoke in support of the Expenditure Plan, indicating alignment with Director Dufty's earlier comments. She thanked Commissioners and staff for their commitment to engaging the public and expressed deep gratitude to the members the EPAC. She said the EPAC had many priorities to weigh, and many had made time to meet with BART Board Directors to better understand BART's requests. She thanked Commissioners for meeting with BART Board Directors as well. She said she was grateful for the commitment of \$100 million for the BART Core Capacity program as well as additional funding for BART maintenance which would



help fix elevators and replace faregates. She said these were tangible investments that San Francisco riders would be able to feel and see. She referenced the letter from BART expressing support for the Expenditure Plan and said BART carried more than 55,000 riders through San Francisco daily before the pandemic. She expressed a continued commitment to be a strong collaborative partner in the City of San Francisco.

Cathy DeLuca, with Community Living Campaign (CLC), urged endorsement of the Expenditure Plan and in particular the increased allotment for paratransit. She said that during the pandemic SFMTA started the essential trip card program and CLC worked to help people sign up and partnered with the SFMTA to help pay for trips. She said to date CLC had subsidized over 150 residents. She shared stories from those grateful for the essential trip card who use it to reach doctors' appointments, grocery stores, and other daily needs. She said it gave seniors and people with disabilities the opportunity to travel with dignity. She thanked staff and the EPAC for their hard work and for coming up with an Expenditure Plan that valued seniors and people with disabilities and asked for Board endorsement of the Expenditure Plan.

Sharky Laguana, EPAC member, said he was grateful for all the work staff put into the Expenditure Plan and urged the Board to approve the Expenditure Plan and move it forward to voters. He said it was a carefully considered process and the result balanced concerns and would advance San Francisco transportation goals for the future.

Sarah Greenwald, with 360 San Francisco and resident of District 2, noted that the District 2 supervisor is acutely aware of the relationship between transit and climate. She expressed support for the plan for two reasons. She stated that the first reason was climate, saying that it was crucial to get people out of gas cars and onto public transit. Her second reason was that she did not have access to a reliable car and relies on transit. She noted that the plan has excellent new project prioritization criteria, and that funding would be directed to communities that have been impacted by displacement and neglected by past transportation projects, and to low-income communities, communities of color and Equity Priority Communities. She noted that this would help people get back to transit and help people in these communities get out of cars and onto cleaner public transit.

Rudy Gonzalez, Secretary and Treasurer with the San Francisco Building and Construction Trades Council, expressed strong support for the expenditure plan. He stated that staff put in an incredible amount of time and did a great job facilitating. Mr. Gonzalez expressed gratitude for Chair Mandelman and EPAC members for demonstrating how governance can work and in real time. He stated that there was a lot of adaptive leadership that responded to paratransit, equity and BART Core Capacity needs. He stated that the Trades Council is in support of implementing the Caltrain Downtown Extension (DTX) to Salesforce Transit Center. He stated that the climate demands it, the moment for economic recovery demands it, and that the 1300 skilled and trained out-of-work San Franciscans in their crafts were hoping for it. He said that they see an incredible opportunity to pair local programs and regional priorities with once in a generation matching federal funds. He said it was a thoughtful approach that will do great things. He urged the Board's support of the expenditure plan.

Charlie Lavrie, with Operating Engineers Local 3 representing 10,000 construction



equipment operators and construction inspectors, expressed support for the new expenditure plan and for the \$300 million for DTX. He thanked the EPAC or their civic service, and the staff for their work. He wished everyone a happy International Women's Day, and that his union had the highest number of women in any craft, but that there was still a lot of work to do. He expressed excitement to be in support of a historic process that will have a global impact, to do climate mitigation, getting cars off the road and planes out of the air. He noted the equity value of the DTX project, with job creation and linking underserved communities. Mr Lavrie stated that he had served for four years on the Transbay Joint Powers Authority (TJPA) Citizens Advisory Committee for the Transbay Transit Center, where there were over 600 operating engineers, including individuals from underserved communities who served their entire apprenticeship on that single project. He stated that this is the kind of project that they need, and that the funding here is needed to leverage federal funding. He urged everyone to move the project forward.

Harry Toronto expressed support for the extra funding in the paratransit portion of the expenditure plan. He stated that unfortunately taxi drivers don't have a dedicated advocate who can seek inclusion of taxis in the expenditure plan. He noted that with the increase in gas costs, there wasn't enough of a tip included in the paratransit debit cards or Essential Trip Cards. He stated that tips were capped at 10%. He stated that they had asked for an increase in costs on these cards. He emphasized that they go the extra mile, particularly in the evenings and late nights, for seniors and people with disabilities. He said that he hoped the plan would include this, and that he would have liked to have included some medallion debt relief for taxi drivers as well. He stated that this was needed to attract more drivers, and that some drivers would have their loans foreclosed on if they do not receive aid.

Dan Torres, Business Agent with Sprinkler Fitters Local 43, spoke in support of the plan.

Bruce Agid, member of Friends of the DTX, board member and transportation representative of the South Beach Rincon Mission Bay Neighborhood Association, and former chair of the TJPA Citizens Advisory Committee, expressed his support of the resolution endorsing the 2022 Expenditure Plan. He said that as a member of the public he listened to the last EPAC meeting and appreciated the thoughtful approach to capture thoughts and perspectives of each committee member, and the process to develop a scenario, where though no group got everything they wanted, an excellent compromise was reached with a delicate balance between priorities, which ultimately everyone voted to support.

Adam Van de Water, Executive Director with the TJPA, thanked the EPAC members, Transportation Authority staff, and Commission for their time and commitment to developing the expenditure plan and for endorsing \$300 million for the DTX project. He noted this was a critical demonstration of local support as they approach significant funding opportunities at the state and federal levels with the 2023 application to the Bipartisan Infrastructure Law, and seek to bring riders through a 2 mile extension into downtown San Francisco via Caltrain and the future High Speed Rail network and deliver sustainable equitable efficient and high-quality transportation to the region. He expressed his appreciation for the hard work going into this effort and supported approval of the item.

Danny Campbell, with Sheet Metal Workers Local 104, expressed support for the plan.



He noted that the DTX project is a once in a generation investment to connect 11 transit systems. He said it would get people out of their cars and get them into San Francisco to spend their money at local businesses and rejuvenate the economy, and more importantly it would put construction workers back to work, creating good middle class union jobs building a world-class transit system.

David Pilpel stated that the Muni Reliability and Street Safety GO Bond on the June 2022 ballot may inform how this measure does in November. He stated his opposition to 3-car trains on the N-Judah line, and to forced transfers on the subway. He noted that the Muni Metro Core Capacity study funded in the plan has a broad, programmatic scope. He stated that he felt there was too much funding in enhancements and not enough for maintenance in the plan. He recognized the tension between the two and said he favored state of good repair. Mr. Pilpel said he would like to ensure that mid-life overhauls of transit vehicles and other efforts to maintain assets funded actually happen, either by policy or by language in the expenditure plan. He stated that current uncertainties in the world and in transportation planning might support a delay of the sales tax measure for two years. He said he would also like the EPAC to be consulted with respect to the implementation of the plan if the measure passes, which did not happen with the 2003 Prop K EPAC and which he feels was a missed opportunity. He also stated that he feels the SFMTA is a lightning rod while other agencies are viewed in a more neutral or favorable light in public opinion and that perception of SFMTA as it evolves going forward, may influence how this measure performs.

Pi Ra, with Senior Disability Action and EPAC member, expressed support for the plan. He stated he was honored to be a part of the EPAC, and that he had participated in the Prop K and Prop B EPACs, as well. He felt this was the best session group he'd dealt with of the three, and was happy with the recommendations particularly around paratransit, since he used to work for paratransit in the 80s and 90s. He recommended that the Board pass the recommended that the EPAC worked hard to put together and thanked the Board and staff.

Joe Cauthen, President with Bay Area Transportation Working Group, expressed support for the expenditure plan, noting that he was impressed by how balanced it was. He stated he was all for improving paratransit and hoped to see reduced waiting times. He noted that the group was very involved in Muni Metro, and that he thinks there needed to be a system worked out so that there were not so many trains entering the subway in the peak hour and at the same time making sure no one had to transfer to get downtown, that there should be a single seat ride for everybody, which can be worked out. He stated that he was impressed by how much work San Francisco had done to improve bus travel and give more priority to Muni buses, but that there was a long way to go on that. Finally, he noted that in order to improve internal circulation including buses and traffic, there needed to be alternative ways of getting people in and out of town by non-automotive means, so improvements to BART and Caltrain and to the Caltrain extension were very important.

Wesley Tam, EPAC District 2 representative, expressed support for the passage of the expenditure plan. He stated that he hoped the Commissioners would support it.

After public comment, Chair Mandelman reiterated the thanks for all of the members of the EPAC, for staff who worked hard to get to this point, and for partners from various transportation agencies.



Commissioner Preston moved to approve the item, seconded by Commissioner Walton.

The item was approved without objection by the following vote:

Ayes: Commissioners Chan, Mar, Mandelman, Melgar, Peskin, Preston, Ronen, Safai, and Walton (9)

Absent: Commissioners Haney (excused) and Stefani (2)

7. State and Federal Legislation Update - ACTION

Amber Crabbe, Public Policy Manager, and Mark Watts, state legislative consultant, presented the item per the staff memorandum.

During public comment, Julie Mitchell, with San Francisco Bay Area Families for Safe Streets, urged support for AB 2336 (Friedman and Ting), and shared the story of her son Dylan's death due to traffic violence and the impact it had on her family and her life. She said effective enforcement tools like speed safety cameras were needed to help San Francisco get to Vision Zero.

Wu Xing requested support for AB 2336 and shared multiple personal experiences of being injured in traffic collisions and the impact on her life. She said speeding is the number one factor in crashes and the bill would help San Francisco address it.

Jenny Yu shared her experience of caring for her mother after a serious injury from a traffic collision and requested more funding for speed reduction measures.

Rick Sterling shared his personal experience with traffic violence and the time and effort it took him to recover. He requested more funding for speed reduction measures.

After public comment, Commissioner Peskin moved to approve the item, seconded by Commissioner Melgar.

The item was approved without objection by the following vote:

Ayes: Commissioners Chan, Mar, Mandelman, Melgar, Peskin, Preston, Ronen, Safai, Stefani, and Walton (10)

Absent: Commissioner Haney (excused) (1)

8. Allocate \$1,791,758 in Prop K Funds, with Conditions, and Appropriate \$150,000 for Three Requests - ACTION

Mike Pickford, Senior Transportation Planner, and Jesse Koehler, Rail Program Manager, presented the item per the staff memorandum.

Vice Chair Peskin commented that many years in the past he had expressed a concern over an outreach contract that the Transportation Authority had with a firm that doubled as a lobbyist that often contacted the Board of Supervisors in their capacity as a lobbyist. He noted he was troubled by that conflict which was eventually resolved. He continued by saying he was also troubled by a somewhat similar ethical quandary in granting funds to an organization that also plays a role in the political endorsement process. Vice Chair Peskin applauded the San Francisco Bicycle Coalition's (SFBC's) work but observed that it is troubling that officials are put in a weird position of granting funds to an organization that they in turn request



endorsements from. He noted that he voted to approve similar Bike to Work Day allocations in the past, but that he wanted to pose this ethical question to this body, noting it didn't need to be solved today and that there were various ways to resolve the issue.

Commissioner Safai recommended support for speed limit reductions in his district, for San Jose Avenue and Ocean Avenue which had a lot of traffic injuries and was an area with a lot of small businesses, families, and seniors. He said his office had been working with the community to improve traffic calming and pedestrian and bike safety. Commissioner Safai thanked members of the community and SFMTA staff for their work on the project and said he was looking forward to seeing speed limits reduced along San Jose Avenue.

During public comment, David Pilpel opposed the proposed Muni Metro Core Capacity Study allocation, saying it would lead to 3-car trains on the N Judah and M Ocean light rail lines as well as forced transfers on West Portal and Church and Market streets stations on the K, L, and J lines. He said there should be a range of stakeholders on the working group including dissenting voices and strong oversight by the SFMTA board and the Board of Supervisors or Transportation Authority Board.

Brian Haagsman, Walk San Francisco, echoed the comments from callers on Item 7 about supporting 20 mile-per-hour zones because they were half as likely as 25 mile-per-hour zones to leave someone dead in a traffic crash, stressing the importance of SFMTA's commitment to those speed reduction projects. He requested the Commissioners' continued their support for the 20 mile-per-hour zones in each district.

Barry Toronto agreed with Vice Chair Peskin's concerns about conflict of interest issues with the SFBC received grant funds. He suggested giving money to the Taxi Drivers' alliance for promotion and enforcement, and safety classes for Taxi drivers.

After public comment, Commissioner Melgar asked staff to speak on the transfer issue at the West Portal station between the M and L lines, which was understood to be a pilot program and asked staff for clarification.

Kansai Uchida with the SFMTA answered that the study will explore options for efficiency and capacity. He said several strategies will be analyzed technically and no decisions had yet been made about which strategies SFMTA will adopt.

Commissioner Melgar requested staff to ensure the study looked at impacts on ridership.

Chair Mandelman separated the first two allocations, Muni Metro Core Capacity Study and 20 MPH Speed Limit Reductions for a vote.

Commissioner Peskin moved to approve the proposed allocations and appropriation for the Muni Metro Core Capacity Study and 20 MPH Speed Limit Reductions as recommended by staff, seconded by Commissioner Mandelman.

The item was approved without objection by the following vote:

Ayes: Commissioners Chan, Mar, Mandelman, Melgar, Peskin, Preston, Ronen, Safai, Stefani, and Walton (10)

Absent: Commissioner Haney (excused) (1)



Commissioner Melgar moved to approve the Bike to Work Day allocation, seconded by Commissioner Mandelman.

The item was approved by the following vote:

Ayes: Commissioners Chan, Mar, Mandelman, Melgar, Preston, Ronen, Stefani, and Walton (8)

Nays: Commissioners Peskin and Safai (2)

Absent: Commissioner Haney (1)

9. Introduction of New Items - INFORMATION

There were no new items introduced.

10. Public Comment

There was no general public comment.

11. Adjournment

The meeting was adjourned at 11:59 a.m.



RESOLUTION APPOINTING PETER TANNEN TO THE COMMUNITY
ADVISORY COMMITTEE OF THE SAN FRANCISCO COUNTY TRANSPORTATION
AUTHORITY

WHEREAS, Section 131265(d) of the California Public Utilities Code, as implemented by Section 5.2(a) of the Administrative Code of the San Francisco County Transportation Authority, requires the appointment of a Community Advisory Committee (CAC) consisting of eleven members; and

WHEREAS, There is one open seat on the CAC resulting from a member's term expiration; and

WHEREAS, At its March 8, 2022, meeting, the Board reviewed and considered all applicants' qualifications and experience and recommended appointing Peter Tannen to serve on the CAC for a period of two years; now therefore, be it

RESOLVED, That the Board hereby appoints Peter Tannen to serve on the CAC of the San Francisco County Transportation Authority for a two-year term; and be it further

RESOLVED, That the Executive Director is authorized to communicate this information to all interested parties.



Memorandum

AGENDA ITEM 5

DATE: March 1, 2022

TO: Transportation Authority Board

FROM: Maria Lombardo – Chief Deputy Director

SUBJECT: 03/08/2022 Board Meeting: Appoint One Member to the Community Advisory Committee

<p>RECOMMENDATION <input type="checkbox"/> Information <input checked="" type="checkbox"/> Action</p> <p>Neither staff nor Community Advisory Committee (CAC) members make recommendations regarding CAC appointments.</p> <p>SUMMARY</p> <p>There is one open seat on the eleven-member CAC requiring Board action. The vacancy is a result of the term expiration of Peter Tannen (District 8 representative). There are currently 16 applicants to consider for the open seat (Attachment 2).</p>	<p><input type="checkbox"/> Fund Allocation</p> <p><input 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 checked="" type="checkbox"/> Other: CAC Appointment</p>
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BACKGROUND

The Transportation Authority has an eleven-member CAC and members serve two-year terms. Per the Transportation Authority's Administrative Code, the Board appoints individuals to fill open CAC seats. Neither staff nor the CAC make recommendations on CAC appointments, but we maintain a database of applications for CAC membership. Attachment 1 is a tabular summary of the current CAC composition, showing ethnicity, gender, neighborhood of residence, and affiliation. Attachment 2 provides similar information on current applicants, sorted by last name.



DISCUSSION

The selection of each member is approved at-large by the Board; however traditionally the Board has had a practice of ensuring that there is one resident of each supervisorial district on the CAC. Per Section 5.2(a) of the Administrative Code, the CAC:

“...shall include representatives from various segments of the community, such as public policy organizations, labor, business, seniors, people with disabilities, environmentalists, and the neighborhoods, and reflect broad transportation interests. The committee is also intended to reflect the racial and gender diversity of San Francisco residents.”

An applicant must be a San Francisco resident to be considered eligible for appointment. Applicants are asked to provide residential location and areas of interest but provide ethnicity and gender information on a voluntary basis. CAC applications are distributed and accepted on a continuous basis. CAC applications were solicited through the Transportation Authority's website, Commissioners' offices, and email blasts to community-based organizations, advocacy groups, business organizations, as well as at public meetings attended by Transportation Authority staff or hosted by the Transportation Authority. Applications can be submitted through the Transportation Authority's website at www.sfcta.org/cac.

All applicants have been advised that they need to appear in person before the Board in order to be appointed, unless they have previously appeared. If a candidate is unable to appear before the Board on the first appearance, they may appear at the following Board meeting in order to be eligible for appointment. An asterisk following the candidate's name in Attachment 2 indicates that the applicant has not previously appeared before the Board.

FINANCIAL IMPACT

The requested action would not have an impact on the adopted Fiscal Year 2021/22 budget.

CAC POSITION

None. The CAC does not make recommendations on the appointment of CAC members.

SUPPLEMENTAL MATERIALS

- Attachment 1 - Matrix of CAC Members
- Attachment 2 - Matrix of CAC Applicants
- Enclosure 1 - CAC Applications

COMMUNITY ADVISORY COMMITTEE MEMBERS ¹

Name	Gender	Ethnicity	District	Neighborhood	Affiliation	First Appointed	Term Expiration
Peter Tannen	M	C	8	Inner Mission	Environmental, Neighborhood, Public Policy	Feb 2008	Feb 2022
John Larson, Chair	M	NP	7	Miraloma Park	Environment, Neighborhood, Public Policy	Mar 2014	Mar 2022
Nancy Buffum	F	C	4	Sunset	Business, Disabled, Environment, Labor, Neighborhood, Public Policy, Seniors	Sept 2020	Sept 2022
Robert Gower	M	C	11	Mission Terrace	Disabled, Environment, Neighborhood, Public Policy, Seniors	Sept 2018	Sept 2022
David Klein, Vice-Chair	M	C	1	Outer Richmond	Environment, Labor, Neighborhood, Public Policy, Seniors	Sept 2018	Sept 2022
Jerry Levine	M	C	2	Cow Hollow	Business, Neighborhood, Public Policy	Nov 2018	Nov 2022
Sophia Tupuola	F	NH	10	Bayview Hunters Point	Business, Disabled, Environment, Labor, Neighborhood, Public Policy, Seniors	Mar 2019	Mar 2023
Rosa Chen	F	A	3	Chinatown	Business, Disabled, Environment, Neighborhood, Public Policy, Seniors	Mar 2021	Mar 2023
Kevin Ortiz	M	H/L	9	Mission	Neighborhood, Public Policy	Dec 2019	Dec 2023
Eric Rozell	M	C	6	Tenderloin	Disabled, Neighborhood, Seniors	Jan 2022	Jan 2024
Kat Siegal	F	C	5	NP	NP	Feb 2022	Feb 2024

*A – Asian | AA – African American | AI – American Indian or Alaska Native | C – Caucasian | H/L – Hispanic or Latino | NH – Native Hawaiian or Other Pacific Islander | NP – Not Provided (Voluntary Information)

COMMUNITY ADVISORY COMMITTEE APPLICANTS ¹

	Name	Gender	Ethnicity	District	Neighborhood	Affiliation/Interest
1	Sauod Alzahrani	M	ME	6	N/A	Business, Disabled, Environment, Labor, Neighborhood, Public Policy, Senior, and Social and Racial Injustice
2	Christine Auwarter*	F	C	5	Western Addition / Inner Richmond	Disabled, Environment, Social and Racial Injustice, Neighborhood, Public Policy
3	Tre Ely	M	AA	6	SOMA	Business, Environment, Homelessness, Public Policy, Social and Racial Injustice
4	Lun Esex*	M	NP	5	Haight-Ashbury	Business, Disabled, Environment, Social and Racial Injustice, Labor, Neighborhood, Public Policy, Senior
5	Matthew Gerson*	M	C	5	Lower Haight	Environment, Social and Racial Injustice, Neighborhood, Public Policy
6	Genna Gores	F	C	5	NOPA	Environment, Social and Racial Injustice, Labor, Neighborhood, Public Policy
7	Kay Hones*	F	C	5	Mission	Disabled, Environment, Social and Racial Injustice, Labor, Neighborhood, Public Policy, Senior, Youth
8	Sarah Katz-Hyman*	F	C	5	Alamo Square	Environment, Social and Racial Injustice, Neighborhood
9	Kimra McPherson*	F	C	5	Inner Sunset	Neighborhood
10	Evan Oravec*	M	NP	5	Haight- Ashbury	Disabled, Environment, Social and Racial Injustice, Labor, Neighborhood, Public Policy, Senior
12	Peter Sengh*	M	A	6	East Cut	Business, Environment, Neighborhood, Public Policy, Senior
13	Ronaldo Smith*	M	C	6	SOMA	Environment, Neighborhood
14	Prodan Statev	M	C	6	East Cut	Business, Labor, Neighborhood, Public Policy
15	Peter Tannen	M	C	8	Inner Mission	Environment; Neighborhood; Senior
16	Tony Wessling	M	C	3	North Beach/Russian Hill	Business, Disabled, Environment, Labor, Neighborhood, Public Policy, Senior

*Applicant has not appeared before the Board A – Asian | AA – African American | AI – American Indian or Alaska Native | C – Caucasian | H/L – Hispanic or Latino
 | NH – Native Hawaiian or Other Pacific Islander | NP – Not Provided (Voluntary Information) | ME – Middle Eastern

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San Francisco
County Transportation
Authority



RESOLUTION ENDORSING THE 2022 EXPENDITURE PLAN FOR THE
REAUTHORIZATION OF THE LOCAL SALES TAX FOR TRANSPORTATION

WHEREAS, In June 2021, through approval of Resolution 21-51, the Transportation Authority established a schedule and process to develop a new Expenditure Plan for reauthorization of the existing half-cent local sales tax for transportation, and established an Expenditure Plan Advisory Committee (EPAC) to provide feedback and advice on the make-up of the new Expenditure Plan; and

WHEREAS, In December 2021, the Transportation Authority amended the schedule through approval of Resolution 22-22 to target a potential ballot measure for the November 8, 2022 election; and

WHEREAS, The 27 member EPAC was structured to bring a wide variety of perspectives to the table such as neighborhoods, equity priority communities, seniors and disabled persons, business and labor, and transportation advocacy groups; and

WHEREAS, The EPAC met 11 times over several months and considered an inventory of over \$50 billion (2020 \$'s) in transportation needs and prioritized \$26 billion (2020 \$'s) for funding through the 30-year 2022 Expenditure Plan; and

WHEREAS, After considerable discussion, the EPAC voted unanimously on February 24, 2022, to recommend to the Transportation Authority Board adoption of the 2022 Expenditure Plan (Attachment 1); and

WHEREAS, The Transportation Authority's endorsement of the Expenditure Plan for the Reauthorization of the Local Sales Tax for Transportation does not involve any approval of an activity which may cause a direct, or a reasonably foreseeable indirect, physical change in the environment and further, is an action relating to the creation of a government funding mechanism not involving any commitment to any specific project which may result in a potentially significant physical impact on the



environment and is, therefore, not subject to the California Environmental Quality Act, Public Resources Code, §§ 21000 et seq.; and

WHEREAS, Pursuant to Section 131052 of the Public Utilities Code, the proposed 2022 Expenditure Plan was subject to a public hearing on March 8, 2022, and the 2022 Expenditure Plan will be submitted to the Metropolitan Transportation Commission, for its approval; and

WHEREAS, Consistent with the adopted Transportation Authority policy for the programming of funds for transportation projects, the 2022 Expenditure Plan projects need to be amended into the Capital Improvement Program of the Congestion Management Program; and

WHEREAS, In June/July 2022, the San Francisco Board of Supervisors is expected to act placing the local half-cent transportation sales tax reauthorization ordinance on the November 2022 ballot that would continue in effect the existing half-cent transportation sales tax for 30-years to fund the programs in the 2022 Expenditure Plan; now, therefore, be it

RESOLVED, That the Transportation Authority hereby endorses the attached 2022 Expenditure Plan for the reauthorization of the local sales tax for transportation, as recommended by the EPAC; and be it further

RESOLVED, That, effective upon its approval pursuant to Section 131055 of the Public Utilities Code, the 2022 Expenditure Plan will be amended into the Capital Improvement Program of the Congestion Management Program.

Attachment:

1. 2022 Expenditure Plan

Attachment 1 - 2022 Expenditure Plan

2022 Expenditure Plan

1. Introduction

- A. Summary.** The 2022 Expenditure Plan identifies transportation improvements to be funded from the retail transactions and use tax authorized under Public Utilities Code section 131000 et seq. and passed by San Francisco voters at the November 2022 election as **Proposition (Prop) TBD** ("2022 Sales Tax"). The programs included in the 2022 Expenditure Plan are designed to be implemented over the next 30 years. The 2022 Expenditure Plan includes investments in five major categories: Major Transit Projects to support more reliable buses and trains and core capacity improvements; Transit Maintenance & Enhancements to help keep transit running safely and make connectivity, accessibility, and reliability improvements; Paratransit services for seniors and people with disabilities; Streets & Freeways to deliver safer, smoother streets including bicycle and pedestrian improvements and street resurfacing; and Transportation System Development & Management to fund programs that reduce congestion and improve air quality and transportation/land use coordination.

Context. Since 1990, San Francisco has had a one-half of one percent transactions and use tax authorized under Public Utilities Code section 131000 et seq dedicated to funding transportation improvements. San Francisco voters approved the first such sales tax and expenditure plan in November 1989 and the second in November 2003. The San Francisco County Transportation Authority (Transportation Authority) was established through the 1989 ballot measure to administer the sales tax and subsequently was designated as administrator of the 2003 successor measure.

The 2022 Expenditure Plan for the use of funds from the 2022 Sales Tax was developed by the Expenditure Plan Advisory Committee (EPAC), established by the Transportation Authority Board, with technical assistance provided by the Transportation Authority and other transportation agencies. The roster of EPAC members is provided in Attachment 1. The Expenditure Plan was recommended by the Transportation Authority Board on [date].

Guided by the EPAC, equity has been at the forefront of the process to develop the 2022 Expenditure Plan, the investments included within, as well as how it will be administered.

Half of the EPAC is comprised of representatives from Equity Priority Communities (EPCs) and other city neighborhoods, including organizations that serve EPCs. The process to develop the 2022 Expenditure Plan included robust outreach and engagement in multiple languages, with a focus on reaching EPCs and populations that do not typically engage in transportation planning.

Investments are designed to fill gaps identified in an equity analysis conducted at the beginning of the process and include improvements to travel time and accessibility, traffic safety, and public health, as well as addressing transportation costs and supporting community-based planning, including a focus on EPCs.

Attachment 1 - 2022 Expenditure Plan

Administration of the 2022 Expenditure Plan will include a transparent and accountable process, and equity requirements have been built into administration. More details on administration are included in Section 5. Implementation Provisions.

By providing the required local match, the 2022 Sales Tax is intended to leverage about \$23.7 billion in federal, state, regional and other local funding for transportation projects in San Francisco.

The 2022 Expenditure Plan contains a list of transportation programs describing the types of transportation investments that will be given priority for 2022 Sales Tax funding. As such, the 2022 Expenditure Plan shall be amended into the Capital Improvement Program of the Congestion Management Program, developed pursuant to section 65089 of the California Government Code. These programs are intended to help implement the long-range vision for the development and improvement of San Francisco's transportation system, as articulated in the San Francisco Transportation Plan (SFTP) 2050.

The SFTP is the City's blueprint to guide the development of transportation funding priorities and policy. The SFTP is a living document, updated on a quadrennial basis to identify and address changing needs and regional trends and align them with available funding.

- B. Goals.** The purpose of the 2022 Expenditure Plan is to implement the priorities of the SFTP 2050 through investment in projects and programs that include planning, maintenance, and rehabilitation of, and improvements to the city's multi-modal transportation system. The SFTP 2050 is part of the ConnectSF initiative, a multi-agency collaborative process to build an effective, equitable, and sustainable transportation system for San Francisco's future. The goals of ConnectSF and of the SFTP 2050 are:
- **Equity.** San Francisco is an inclusive, diverse, and equitable city that offers high-quality, affordable access to desired goods, services, activities, and destinations.
 - **Economic Vitality.** To support a thriving economy, people and businesses easily access key destinations for jobs and commerce in established and growing neighborhoods both within San Francisco and the region.
 - **Environmental Sustainability.** The transportation and land use system support a healthy, resilient environment and sustainable choices for future generations.
 - **Safety and Livability.** People have attractive and safe travel options that improve public health, support livable neighborhoods, and address the needs of all users.
 - **Accountability and Engagement.** San Francisco agencies, the broader community, and elected officials work together to understand the City's transportation needs and deliver projects, programs, and services in a clear, concise, and timely fashion.
- C. Plan Findings and Structure.** The Transportation Authority finds that:
- i. Adoption of an ordinance to impose a sales tax at the existing half-cent rate for the 30-year implementation period of the 2022 Expenditure Plan is necessary

Attachment 1 - 2022 Expenditure Plan

in order to fund the transportation programs listed in Section 3, Table 1 and further detailed in Section 4, Description of Programs.

- ii. It is deemed unnecessary to seek the support of adjacent counties by requesting them to develop their own Transportation Expenditure Plans because San Mateo, Alameda, Contra Costa, Marin and [San Mateo Santa Clara](#) counties have already adopted Transportation Expenditure Plans.

The Transportation Authority recommends that the San Francisco Board of Supervisors place the aforementioned sales tax ordinance on the November 2022 ballot.

The 2022 Expenditure Plan is organized into five sections.

Section 1: Introduction provides background on the Plan's goals and development. Section 2: General Provisions provides further context on the Plan's policies and administration. Section 3: Expenditure Plan Summary Table summarizes the Plan's investment detail (~~e.g.i.e.~~ recommended funding distribution) by category, sub-category and program. Section 4: Description of Programs contains descriptions of the programs (organized by category and subcategory), including the types of projects that are eligible for funding under each of them. Section 5: Implementation Provisions describes the process for prioritizing and allocating funds from the 2022 Sales Tax following adoption of the Plan.

2. General Provisions

- A. Sales Tax Revenues.** The 2022 Expenditure Plan shall supersede the Proposition K Expenditure Plan, adopted in 2003, as of the operative date of the 2022 Sales Tax, which shall be at the same one-half percent rate as approved by San Francisco voters in November 2003 as Proposition K, and shall be imposed for the 30-year duration of the 2022 Expenditure Plan.

Revenues from the 2022 Sales Tax are estimated under two scenarios over the 30-year period of the New Expenditure Plan, both of which net ~~out~~ an estimated \$550 million in Proposition K financial liabilities (See Section D, Successor Program). The conservative projection, which corresponds to Priority 1 funding levels, puts the total revenue level at \$2.378 billion (2020 dollars). This scenario reflects an average growth rate of 2.1%, and an inflation-based discount rate of 3%. The more optimistic revenue projection, which corresponds to Priority 2 funding levels, reflects an average growth rate of 2.6%, and an inflation-based discount of 3%.

- B. Fiscal Constraint.** The 2022 Expenditure Plan is fiscally constrained to the total funding expected to be available for each category (~~e.g.i.e.~~ percent of revenues designated for each category) and by the funding caps established for each program. The financial constraint is further detailed within each program through the specification of funding priority levels, i.e., Priority 1 and Priority 2 (See Section 4 Description of Programs).
- C. Restriction of Funds.** 2022 Sales Tax revenues shall be spent on capital projects rather than to fund operations and maintenance of existing transportation services, unless otherwise explicitly specified in the Section 4. Description of Programs. In accordance with enabling legislation and adopted principles, 2022 Sales Tax revenues generated pursuant to this plan shall be subject to the following restrictions:

Attachment 1 - 2022 Expenditure Plan

i. **No Substitution.**

- a. 2022 Sales Tax revenues shall be used to supplement and under no circumstance replace existing local revenues used for transportation purposes listed in the 2022 Expenditure Plan.
- b. Proceeds from the sale or liquidation of capital assets funded with 2022 Sales Tax revenues shall be returned to the Transportation Authority (in proportion to the contribution of 2022 Sales Tax revenues to the total original cost of the asset), for re-allocation to eligible expenses within the program from which funds were expended for the original investment.

ii. **No Expenditures Outside San Francisco.** Unless otherwise explicitly specified in Section 4, Description of Programs, no 2022 Sales Tax funds shall be spent outside the limits of the City and County of San Francisco except for cases that satisfy all the following conditions:

- a. **Quantifiable Benefit.** The proposed project is eligible to be funded with the ~~2020-2022~~ Sales Tax consistent with the 2022 Expenditure Plan, and if planning or other studies developed in order to enable its implementation demonstrate that there will be a quantifiable benefit to the City and County's transportation program from the expenditure of funds beyond the City and County line. A quantifiable benefit is defined as a measurable increase in the cost effectiveness of a project or group of transportation projects ~~and~~ or services at least partially funded with 2022 Sales Tax funds, located along the corridor or in the immediate geographic area of the City and County where the project in question is proposed to occur.
- b. **Expenses Matched by Other Counties.** The proposed expense is matched by funding from the county where the expenditure of 2022 Sales Tax funds is proposed to be made.

Should transportation projects or services contemplated in the plan require the participation of multiple counties for any phase of project planning or implementation, the Transportation Authority shall work cooperatively with the affected county or counties to ensure successful project implementation.

iii. **Funding Caps for Legacy Projects.** Projects carried forward from the Proposition K Expenditure Plan as legacy projects shall be eligible to receive Priority 1 funds from the designated programs, not to exceed the unallocated amounts programmed in the Proposition K Strategic Plan as of the operative date of the 2022 Sales Tax approved by the voters in Prop TBD.

iv. **Administration Costs.** Pursuant to Public Utilities Code section 131107, not more than 1 percent of the annual net amount of revenues raised by the 2022 Sales Tax may be used to administer the Expenditure Plan.

D. Successor Program. The 2022 Expenditure Plan shall supersede the Proposition K Expenditure Plan, adopted in 2003, as of the operative date of the 2022 Sales Tax. As such it will bear responsibility for any outstanding debt incurred by the Proposition K program, for reimbursement of eligible costs for outstanding balances on Proposition

Attachment 1 - 2022 Expenditure Plan

K grants, and for other financial liabilities. All assets of the Proposition K program shall become **Prop TBD** program assets.

- E. Bonding Authority.** The Transportation Authority shall be authorized to issue, from time to time, limited tax bonds in a total outstanding aggregate amount not to exceed \$1.91 billion, payable from the sales tax revenues generated pursuant to the [2022 Sales Tax adopted by the voters as Prop TBD](#). The Transportation Authority's bonding capacity shall be separate and distinct from that of the City and County of San Francisco.
 - F. Administration by the San Francisco County Transportation Authority.** The San Francisco County Transportation Authority, which currently allocates, administers, and oversees the expenditure of the existing Proposition K sales tax for transportation, shall allocate, administer, and oversee the expenditure of the **Prop TBD** sales tax funds.
 - G. Environmental Review.** Environmental reporting, review and approval procedures as provided for under the National Environmental Policy Act (NEPA), and/or the California Environmental Quality Act (CEQA), and other applicable laws shall be carried out as a prerequisite to the approval and implementation of any project, included legacy projects, to be funded partially or entirely with 2022 Sales Tax funds. No definite commitment to any activity or project is made by the adoption of the Expenditure Plan. The Expenditure Plan establishes a funding mechanism for transportation improvements which does not involve any commitment to any specific project which may result in a potentially significant physical impact on the environment. The Expenditure Plan also does not limit the discretion of agencies proposing to carry out eligible projects to select a no action or a no project alternative.
- 3. Expenditure Plan Summary Table.** Table 1 below summarizes the proposed 2022 Sales Tax revenue allocations by category, subcategory, and program in constant 2020 dollars. There are five categories, identified with capital letters (A through E). The first subdivision level under each category is known as a subcategory. Subcategories are indicated with lower case Roman numerals. The level below a subcategory is known as a program.

The 2022 Expenditure Plan identifies eligible expenditures through a set of programs that guides the types of transportation projects that will be funded by the 2022 Sales Tax. The programs are set up to address allocation of funds to multi-year programs for a given purpose, such as street resurfacing or street safety improvements, for which not all specific project locations or improvements can be anticipated or identified at the time of adoption of the 2022 Expenditure Plan. This provides certainty about the types of investments that will be made balanced with the flexibility needed for a 30-year plan.

Attachment 1 - 2022 Expenditure Plan

Table 1: 2022 Expenditure Plan Summary Table
2020 \$Millions

	Total Expected Funding ¹	Total Prop TBD ²	% of Prop TBD Funding ³
A. Major Transit Projects	\$ 10,354.7	\$ 587.0	22.6%
i. Muni Reliability and Efficiency Improvements	\$ 1,088.3	\$ 110.0	
ii. Muni Rail Core Capacity	\$ 720.0	\$ 57.0	
iii. BART Core Capacity	\$ 3,536.4	\$ 100.0	
iv. Caltrain Service Vision: Capital System Capacity Investments	\$ 10.0	\$ 10.0	
v. Caltrain Downtown Rail Extension and Pennsylvania Alignment	\$ 5,000.0	\$ 310.0	
B. Transit Maintenance and Enhancements	\$ 10,065.3	\$ 1,070.0	41.2%
i. Transit Maintenance	\$ 9,047.1	\$ 975.0	
1. Muni Maintenance	\$ 7,934.8	\$ 825.0	
2. BART Maintenance	\$ 547.7	\$ 45.0	
3. Caltrain Maintenance	\$ 550.3	\$ 100.0	
4. Ferry Maintenance	\$ 14.3	\$ 5.0	
ii. Transit Enhancements	\$ 1,018.2	\$ 95.0	
1. Transit Enhancements	\$ 777.4	\$ 36.0	
2. Bayview Caltrain Station	\$ 100.0	\$ 27.0	
3. Mission Bay Ferry Landing	\$ 53.8	\$ 5.0	
4. Next Generation Transit Investments	\$ 87.0	\$ 27.0	
C. Paratransit³⁴	\$ 1,270.0	\$ 297.0	11.4%
D. Streets and Freeways	\$ 3,767.1	\$ 492.0	18.9%
i. Maintenance, Rehabilitation and Replacement	\$ 2,194.7	\$ 214.0	
1. Street Resurfacing, Rehabilitation and Maintenance	\$ 1,984.0	\$ 105.0	
2. Pedestrian and Bicycle Facilities Maintenance	\$ 84.6	\$ 19.0	
3. Traffic Signs and Signals Maintenance	\$ 126.1	\$ 90.0	
ii. Safe and Complete Streets	\$ 1,114.8	\$ 240.0	
1. Safer and Complete Streets	\$ 918.8	\$ 187.0	
2. Curb Ramps	\$ 143.0	\$ 29.0	
3. Tree Planting	\$ 53.0	\$ 24.0	
iii. Freeway Safety and Operational Improvements	\$ 457.6	\$ 38.0	
1. Vision Zero Ramps	\$ 27.5	\$ 8.0	
2. Managed Lanes and Express Bus	\$ 206.0	\$ 10.0	
3. Transformative Freeway and Major Street Projects	\$ 224.1	\$ 20.0	
E. Transportation System Development and Management	\$ 824.8	\$ 152.0	5.9%
i. Transportation Demand Management	\$ 146.5	\$ 23.0	
ii. Transportation, Land Use and Community Coordination	\$ 678.3	\$ 129.0	
1. Neighborhood Transportation Program	\$ 191.2	\$ 46.0	
2. Equity Priority Transportation Program	\$ 192.2	\$ 47.0	
3. Development Oriented Transportation	\$ 263.7	\$ 26.0	
4. Citywide / Modal Planning	\$ 31.2	\$ 10.0	
Total	\$ 26,281.9	\$ 2,598.0	100.0%
Total Prop TBD Priority 1		\$ 2,378.0	
Total Prop TBD Priority 1 + 2		\$ 2,598.0	

Attachment 1 - 2022 Expenditure Plan

Notes:

¹Total Expected Funding represents project costs or implementable phases of multi-phase projects and programs based on a 30-year forecast of expected revenues from existing federal, state, regional and local sources, plus \$2.598 billion in Prop TBD revenues. The amounts in this column are provided in fulfillment of Sections 131051 (a)(1), (b) and (c) of the Public Utilities Code.

²The "Total Prop TBD" fulfills the requirements in Section 131051 (d) of the Public Utilities Code.

³Percentages are based on Prop TBD Priority 1 and 2 forecasts of \$2.598 billion. The forecast is net of existing obligations of the predecessor Proposition K program.

⁴With very limited exceptions, the funds included in the 30-year forecast of expected revenues are for capital projects rather than operations. Paratransit is the primary exception, providing door-to-door vans and others transportation services for seniors and persons with disabilities who cannot use regular fixed route transit. Total Expected Funding for Paratransit reflects Prop TBD revenues, Federal Section 5307 funds, and other sources of operating funds included in SFMTA's annual operating budget over the next 30 years.

Attachment 1 - 2022 Expenditure Plan

4. Description of Programs.

This section contains descriptions of the categories, subcategories, and programs in the 2022 Expenditure Plan and the types of projects that are eligible for funding under each of them. It also identifies the sponsoring agency or agencies for each program. The Total Funding figures correspond to the Total Expected Funding column in the Expenditure Plan Summary Table provided in Section 3, above. The percentage allocation of 2022 Sales Tax funds to each of the major categories is as follows: Major Transit Projects – 22.6%, Transit Maintenance & Enhancements 41.2%, Paratransit – 11.4%, Streets and Freeways – 18.9%, and Transportation System Development & Management – 5.9%.

A. MAJOR TRANSIT PROJECTS

i. Muni Reliability and Efficiency Improvements

Programmatic improvements that improve the reliability and speed of Muni bus and rail service. Eligible project types include: transit-only lanes; curb bulb-outs at Muni stops; traffic signal modifications; deployment of transit signal priority devices; relocation and upgrade of Muni stops; and other street design changes (e.g. highly visible crosswalks, median island refuges) to reduce delay for transit and enhance pedestrian safety. Includes \$10M in legacy funding for Geary Rapid Improvements Phase 2. Includes project development and capital costs. Sponsor Agency: SFMTA. Total Funding: \$1,088.3M; EP: \$110M.

ii. Muni Rail Core Capacity

Programmatic improvements that increase the reliability and capacity of Muni's rail system by supporting longer and more frequent trains. High priority shall be given to installation of a next generation communications-based train control system for the Muni surface and subway rail network. Engineering improvements may include lengthening existing platforms to accommodate 3 and 4-car light rail trains in the Muni Metro Tunnel between West Portal and Embarcadero stations, and 3-car trains on the N Judah line. Upgrades to switches, crossovers, and other components to increase subway reliability and throughput, and modifications to subway portals to minimize conflicts. Purchase of additional light rail vehicles to increase the fleet's overall capacity and new/upgraded maintenance and/or storage facilities to house additional vehicles. Includes project development and capital costs. Sponsor Agency: SFMTA. The first \$50M is Priority 1 and the remainder is Priority 2. Total Funding: \$720M; EP: \$57M.

iii. BART Core Capacity

Improvements that will allow BART to operate up to 30 ten-car trains per hour in each direction through the existing Transbay Tube (an increase from the current capacity of 23 trains per hour). Eligible project types include: new (additional) rail cars; a new communications-based train control system; a new rail car storage yard at the Hayward Maintenance Complex; and additional traction power substations to provide the power needed for more frequent service. Includes project development and capital costs. As a prerequisite to allocation of funds, the Transportation Authority Board shall consider whether Alameda and Contra Costa Counties have contributed a commensurate amount to the BART Core Capacity Program. Sponsor Agency: BART. Total Funding: \$3,536.4M; EP: \$100M.

iv. Caltrain Service Vision: Capital System Capacity Investments

Programmatic capital improvements that will allow Caltrain service up to operate eight trains per direction per hour consistent with the Caltrain Business Plan Service Vision. Eligible project

Attachment 1 - 2022 Expenditure Plan

types include, but are not limited to, additional fleet, level boarding at station platforms, additional train storage, track work and station improvements. Includes planning, project development, and capital costs. Includes \$10M in Priority 2 funding. Sponsor Agency: PCJPB. Total Funding: \$10M; EP: \$10M.

v. Caltrain Downtown Rail Extension and Pennsylvania Alignment

Caltrain Downtown Rail Extension: The underground extension of the Caltrain commuter rail system from the current Caltrain San Francisco terminus into the Salesforce Transit Center. Project designed to accommodate blended service with future California High-Speed Rail. Includes a new station at 4th and Townsend streets. Includes \$300M in Priority 1 funds.

Pennsylvania Alignment: Below-grade rail alignment extending south from the planned Downtown Rail Extension. Project will serve the Caltrain commuter rail system and future California High-Speed Rail service. Pennsylvania Alignment will separate rail from surface-level conflicts with street users at 16th Street and Mission Bay Drive. Includes \$10M in Priority 2 funds.

Includes project development and capital costs. Sponsor Agencies: TJPA, SFCTA. Total Funding: \$5,000M; EP: \$310M.

B. TRANSIT MAINTENANCE & ENHANCEMENTS

i. Maintenance, Rehabilitation and Replacement Sub-Category

1. **Muni.** Programmatic improvements for upgrade, rehabilitation, and replacement of Muni's capital assets, including transit and paratransit vehicles, spare parts, and on-board equipment; transit facilities and facilities-related equipment; and transit guideways and associated equipment. Eligible project types include but are not limited to the following. Rail car, trolley coach and motor coach renovation and replacement of buses with zero emission vehicles, which may include additional vehicles added to the fleet to maintain current fleet passenger capacity (e.g., if electric buses have lower passenger capacity). Rehabilitation, upgrades and/or replacement of: existing facilities for maintenance and operations, including equipment and upgrades to support the electrification of the Muni motor coach fleet and to improve resilience to climate change; rail stations including, but not limited to platform edge tiles, elevators, escalators, and faregates; existing rail, overhead trolley wires, signals, traction power stations, and automatic train control systems, as well as upgrades to improve resilience to climate change. The intent is to implement transit priority and reliability improvements whenever guideways rehabilitation, upgrade or replacement projects are undertaken. Includes project development and capital costs. Sponsor Agency: SFMTA. The first \$784M is Priority 1 and the remainder is Priority 2. Total Funding: \$7,934.8M; EP: \$825M.
2. **BART.** Programmatic improvements for the upgrade, rehabilitation, and replacement of BART's capital assets. Eligible project types include, but are not limited to the upgrade, rehabilitation and replacement of: transit vehicles and on-board equipment; transit stations including platform edge tiles, elevators, escalators, and faregates; transit facilities and facilities related equipment; and guideways such as rail, train control, traction power, and related equipment. Facilities and guideways improvements may include upgrades to improve resilience to climate change. Additional elevators, escalators, and faregates are also eligible. In shared BART/Muni

Attachment 1 - 2022 Expenditure Plan

stations, elevator and escalator projects must include shared Muni access and/or redundancy where cost effective. Includes project development and capital costs. The first \$35M is Priority 1 and the remainder is Priority 2. Sponsor Agency: BART. Total Funding: \$547.7M; EP: \$45M.

3. **Caltrain.** Provides San Francisco's local match contribution for the Caltrain capital program, on behalf of the City and County of San Francisco until sales tax funds run out. Programmatic improvements such as the upgrade, rehabilitation, and replacement of transit vehicles, spare parts, and on-board equipment; transit facilities (including stations) and facilities related equipment; and guideways such as rail, signals, communications, traction power equipment, and the overhead contact system. Facilities and guideways improvements may include upgrades to improve resilience to climate change. Service planning and capital planning efforts are also eligible. Includes project development and capital costs. Sponsor Agency: PCJPB. Total Funding: \$550.3M; EP: \$100M.
4. **Ferry.** Programmatic improvements for the upgrade, rehabilitation and replacement of landside ferry facilities, passenger-serving facilities, and facilities-related equipment. May also include improvements to San Francisco ferry terminals to accommodate increases in ferry ridership, electrification and to improve resilience to climate change. Includes project development and capital costs. Sponsor Agencies: Port of SF, GGBHTD. Total Funding: \$14.3M; EP: \$5M.

ii. Transit Enhancements Sub-Category

1. **Transit Enhancements.** Customer-facing programmatic improvements that promote system connectivity, accessibility, and reliability and improve transit service experience for riders. These are meant to be smaller to mid-sized projects that produce benefits directly experienced by transit riders. Eligible projects may include but are not limited to bus stop improvements (with priority for those serving disadvantaged communities); wayfinding; real-time information; new (additional) elevators or escalators; multimodal station access and safety improvements; bicycle parking/storage; purchase and rehab of historic streetcars; purchase of motor coaches and paratransit expansion vehicles. Includes project development and capital costs. Sponsor Agencies: SFMTA, BART, PCJPB, TIMMA. The first \$29M is Priority 1 and the remainder is Priority 2. Total Funding: \$777.4M; EP: \$36M.
2. **Bayview Caltrain Station.** Construction of a new or relocated Caltrain station in the Bayview. Includes \$4.73M in legacy funding for the Quint-Jerrold Connector Road, which will restore access eliminated by the construction of a Caltrain berm. Includes project development and capital costs. Sponsor Agencies: SFCTA, PCJPB, SFMTA, SFPW. Total Funding: \$100M; EP: \$27M.
3. **Mission Bay Ferry Landing.** A new ferry landing serving the Mission Bay neighborhood to enable regional ferry service. Includes capital costs. Sponsor Agency: Port of SF. Total Funding: \$53.8M; EP: \$5M.
4. **Next Generation Transit Investments.** Planning and project development for major transit capital projects that promote system connectivity and accessibility, close service gaps, and improve and expand transit service levels. By funding planning, outreach and early project development, the intent is to set these projects up to be competitive

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for discretionary funds to complete project development and implementation. Eligible projects may include but are not limited to a 19th Avenue/Geary subway, extending the Central Subway, Link21 (including a potential second transbay tube), local and regional express bus network development. Sponsor Agencies: SFCTA; SFMTA; BART; PCJPB. The first \$22M is Priority 1 and the remainder is Priority 2. Total Funding: \$87M; EP: \$27M.

C. PARATRANSIT

Paratransit. Continued support for paratransit door-to-door van, taxi and other transportation services for seniors and people with disabilities who are unable to use fixed route transit service. Includes operations support, replacement of accessible vans, and replacement and upgrades of supporting equipment such as debit card systems. Sponsor Agency: SFMTA. The first \$227M is Priority 1 and the remainder is Priority 2. Total Funding: \$1,270M; EP: \$297M.

D. STREETS AND FREEWAYS

i. Maintenance, Rehabilitation and Replacement Sub-Category

1. Street Resurfacing, Rehabilitation and Maintenance.

Repaving and reconstruction of city streets to prevent deterioration of the roadway system, based on an industry-standard pavement management system designed to inform cost effective roadway maintenance. May include sidewalk rehabilitation and curb ramps and elements to improve resilience to climate change Includes project development and capital costs. Sponsor Agency: SFPW. Total Funding: \$1,952M; EP: \$88M.

Replacement of street repair and cleaning equipment according to industry standards, such as but not limited to, asphalt pavers, dump trucks, sweepers, and front-end loaders. Includes capital costs only. Sponsor Agency: SAS. Total Funding: \$32M; EP: \$17M.

2. Pedestrian and Bicycle Facilities Maintenance. Public sidewalk repair and reconstruction citywide. Maintenance of additional pedestrian facility improvements including stairways, retaining walls, guardrails and rockfall barriers. Maintenance of pedestrian and bicycle safety improvements including but not limited to safe hit posts, painted safety zones, green bike lanes, and crosswalks. Rehabilitation of other bicycle facilities such as paths. Includes project development and capital costs. Sponsor Agencies: SFMTA, SAS. Total Funding: \$84.6M; EP: \$19M.

3. Traffic Signs and Signals Maintenance. Maintenance and upgrade of traffic signs and signals, including for pedestrians and bicyclists. Sponsor Agency: SFMTA. Total Funding: \$126.1M; EP: \$90M.

ii. Safe and Complete Streets Sub-Category

1. Safer and Complete Streets. Programmatic improvements to the transportation system to make it safer for all users and help achieve the City's Vision Zero goals. Projects may include:

- Traffic calming to reduce vehicular speeds and improve safety; new or improved pedestrian safety measures such as ladder crosswalks, corner bulb-outs and pedestrian islands in the medians of major thoroughfares; new and upgraded bike

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lanes and paths; traffic striping and channelization; bicycle and personal mobility device parking facilities such as bike/scooter racks and lockers. Quick builds (e.g. paint and safe-hit posts), pilots, permanent improvements, intersection redesigns and larger corridor projects are eligible. Landscaping may be included as a minor element of a larger safety project.

- Installation (new), maintenance, and upgrade of traffic signs and signals (including for pedestrians and bicyclists); red light enforcement cameras and closed-circuit TV and communications systems (e.g. Variable Message Signs) for incident and special event traffic management.
- Multi-modal street improvements to improve pedestrian, bicycle, transit and vehicle circulation and connectivity.
- Bicycle, pedestrian and Vision Zero outreach and education programs such as Safe Routes to School; development of neighborhood and school area safety plans.

Includes project development and capital costs. Sponsor Agencies: SFMTA, SFPW, SFCTA. Includes \$152M in Priority 1, of which a minimum of \$7M will be available for Safe Routes to School non-infrastructure programs, e.g., education, outreach, and planning to support safe transportation to schools. The remainder is Priority 2. Total Funding: \$918.8M; EP: \$187M.

2. **Curb Ramps.** Construction of new Americans with Disabilities Act (ADA)-compliant curb ramps and related roadway work to permit ease of movement. Reconstruction of existing ramps. Includes project development and capital costs. Sponsor Agency: SFPW. Total Funding: \$143M; EP: \$29M.
3. **Tree Planting.** Planting and establishment of street trees in public rights-of-way throughout the city. Priority will be given to neighborhoods and/or areas with lower tree canopy coverage. Sponsor Agency: SAS. Includes \$20M in Priority 1 and the remainder is Priority 2. Total Funding: \$53M; EP: \$24M.

iii. Freeway Safety and Operational Improvements Sub-Category

1. **Vision Zero Ramps.** Programmatic improvements to benefit all users of intersections where freeway on- and off-ramps intersect with city streets to support the City's Vision Zero policy to eliminate traffic deaths. Eligible project types include: new or improved pedestrian safety measures such as ladder crosswalks and pedestrian signals, corner bulb-outs, and new traffic signs and signals. Includes planning, project development and capital costs. Sponsor Agencies: SFMTA, SFCTA. Total Funding: \$27.5M; EP: \$8M.
2. **Managed Lanes and Express Bus.** Programmatic improvements to San Francisco's freeways to improve transit speeds (e.g. express bus) and reliability, and promote carpooling. Improvements may include high occupancy vehicle lanes, ramp re-striping or re-designs, signs and signalization, purchase of buses to support increased Muni bus operations on improved facilities, and if express lanes are proposed, tolling system and funding of an affordability program. Includes project development and capital costs. Sponsor Agencies: SFCTA, SFMTA. Total Funding: \$206M; EP: \$10M.
3. **Transformative Freeway & Major Street Projects.** Planning and project development for transformative multi-modal improvements that are designed to improve safety, enhance multi-modal connectivity, and/or reconnect communities and repair the harm

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created by past freeway and street projects. By funding planning, outreach and early project development, the intent is to set these projects up to be competitive for discretionary funds to complete project development and implementation. Eligible project types may include, but are not limited to new grade-separated crossings for people walking and biking; restoring connections within communities divided by infrastructure (e.g. Geary underpass, pedestrian/bike freeway overcrossings); and simplifying freeway interchanges (e.g. Alemany Maze and US 101/Cesar Chavez "Hairball"). May include projects to improve resilience to climate change. Sponsor Agencies: SFCTA, SFMTA, SFPW, Planning. Total Funding: \$224.1M; EP: \$20M.

E. TRANSPORTATION SYSTEM DEVELOPMENT & MANAGEMENT

i. Transportation Demand Management Sub-Category

Transportation Demand Management. Transportation Demand Management (TDM) improvements intended to shift trips to sustainable modes like transit, biking and walking and shift travel to less congested times. Develop and support continued TDM and parking requirements for large employers, special event sites, and schools and universities. Eligible project types also include TDM education, marketing, incentives, pricing, technology, policy development, pilots, and evaluation. Hardware, software, and equipment needed to implement pricing, incentives and affordability projects are eligible. Examples of eligible projects include new solutions or technologies for first-last mile connections or special trip markets; intermodal integration of customer-facing technology (e.g. travel information and payment systems); and new fare payment concepts for mode shift or congestion management. Includes planning, project development and capital costs. Sponsor Agencies: SFCTA, SFE, SFMTA, BART, PCJPB, TIMMA. Includes \$18M in Priority 1 and the remainder is Priority 2. Total Funding: \$146.5M; EP: \$23M.

ii. Transportation, Land Use and Community Coordination Sub-Category

1. **Neighborhood Transportation Program.** The Neighborhood Transportation Program (NTP) funds community-based neighborhood-scale transportation improvements. The NTP has a planning component to fund community-based planning efforts in each Supervisorial district, and a capital component intended to provide local match to help advance and implement capital investment and pilot recommendations stemming from NTP and other community-based planning efforts. Eligible project types are those that are eligible for other Expenditure Plan programs and result in public-facing benefits. Additional project types include: transportation policy studies, pilots and projects to address climate change (e.g. electric vehicle charging infrastructure) and gaps in equitable access. Includes planning, project development and capital costs. Sponsor Agencies: SFCTA, SFMTA, SFPW, Planning. Includes \$41M in Priority 1 and the remainder is Priority 2. Total Funding: \$191.2M; EP: \$46M.
2. **Equity Priority Transportation Program.** The Equity Priority Transportation Program (EPTP) funds equity priority community-based projects in underserved neighborhoods and areas with vulnerable populations (e.g. low income communities, seniors, children, and/or people with disabilities) as well as citywide equity evaluations and planning efforts. The EPTP has a planning component to fund community-based planning efforts, and a capital component to provide local match funds to help advance and implement capital investment and pilot recommendations stemming from community-

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based planning and equity assessments. Eligible project types are those that are eligible for other Expenditure Plan programs, as well as projects that help reduce disparities and gaps in equitable access (physical, geographic, affordability) to jobs and key services. Includes planning, project development and capital costs. Sponsor Agencies: SFCTA, SFMTA, SFPW, Planning. Includes \$42M in Priority 1 and the remainder is Priority 2. Total Funding: \$192.2M; EP: \$47M.

3. **Development-Oriented Transportation.** The Development-Oriented Transportation Program funds community-based planning to identify transportation improvements that support increased housing density in existing, primarily low-density neighborhoods of the city, as well as project development and implementation. Projects supporting development in adopted Priority Development Areas will be prioritized. Includes \$2M in legacy funding for the Bayshore Caltrain Pedestrian Connection. Includes planning, project development and capital costs. Sponsor Agencies: SFMTA, SFCTA, BART, PCJPB, Planning, SFPW. Includes \$20M in Priority 1 and the remainder is Priority 2. Total Funding: \$263.7M; EP: \$26M.
4. **Citywide/Modal Planning.** Citywide and network-wide transportation studies and planning such as updates to the Countywide Transportation Plan or long-range modal studies. Plans and studies that focus on countywide and/or network wide needs will be prioritized, but corridor-scale studies may be considered. Includes planning. Sponsor Agencies: SFCTA, SFMTA, Planning. Total Funding: \$31.2M; EP: \$10M.

5. Implementation Provisions.

- A. **Strategic Plan.** Subsequent to voter approval of the 2022 Expenditure Plan, the Transportation Authority shall prepare a 30-year Strategic Plan that will serve as the primary financial tool for administering the 2022 Sales Tax. It shall include policies to guide day-to-day program administration consistent with the 2022 Expenditure Plan; updated revenue projections for the 2022 Sales Tax; proposed 2022 Sales Tax programming and expenditures by category, sub-category and program; and any associated financing needed to ensure funds are available to reimburse eligible expenditures. The Strategic Plan shall be prepared in concert with development of 5-Year Prioritization Programs (see Section 5.B.). The Transportation Authority Board shall adopt the Strategic Plan and updates thereof at least every 5 years.
- B. **Prioritization Process.** Prior to allocation of any revenues from the 2022 Sales Tax, the Transportation Authority shall prepare, in close consultation with all other affected planning and implementation agencies, a 5-year prioritized program of projects or 5YPP including budget, scope and schedule consistent with the Strategic Plan, for review and adoption by the Transportation Authority Board. For programs with only one eligible sponsoring agency, the Transportation Authority may designate that agency as the agency that is to prepare the 5YPP. The proposed projects shall be consistent with the [San Francisco Transportation PlanSFTP](#) and with the City's General Plan.

The 5YPPs shall at a minimum address, the following factors:

1. Project readiness, including schedule for completion of environmental and design phases; well-documented preliminary cost estimates; documented community support as appropriate.

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2. Funding plan, including sources other than the 2022 Sales Tax.
3. Compatibility with existing and planned land uses, and with adopted standards for urban design and for the provision of pedestrian amenities; and supportiveness of planned growth in transit-friendly housing, employment and services.
4. How the project would advance equity or seek to mitigate any impacts on equity.
5. Project benefits including but not limited to how the project advances the goals of the SFTP.
6. A prioritization mechanism to rank projects within the 5YPP, that includes at a minimum, the following required criteria:
 - a. Relative level of need or urgency.
 - b. Cost-effectiveness.
 - c. A fair geographic distribution that takes into account the various needs of San Francisco's neighborhoods.
 - d. Level and diversity of community support. Projects with clear and diverse community support, including from disadvantaged populations (e.g., communities historically harmed by displacement, transportation [policies, and](#) projects [and policies](#) that utilized eminent domain; [people with low incomes;](#) [and](#) people of color) and/or identified through a community-based planning process will be prioritized. Projects with documented support from disadvantaged populations will receive additional priority. An example of a community-based plan is a neighborhood transportation plan, corridor improvement study or station area plan that is community driven.
 - e. Benefit to disadvantaged populations, including communities historically harmed by displacement, transportation [policies, and](#) projects [and policies](#) that utilized eminent domain, whether the project is directly located in an Equity Priority Community or can demonstrate benefits to disadvantaged populations.

The Transportation Authority and any appropriate designated agencies shall conduct the required public outreach and engagement to ensure an inclusive planning process for the development of the 5YPPs, as well as General Plan referral or referral to any City Department or Commission, as required. The Transportation Authority working with eligible sponsoring agencies shall also identify appropriate performance measures informed by the Congestion Management Program, such as increased system connectivity, increased transit ridership (net new riders), reductions in travel time for existing riders, system safety, vehicle miles traveled, and increased use of alternatives to the single-occupant automobile, along with a timeline for assessing the performance measures to inform the next 5YPP updates, which shall be at least every 5 years concurrent with Strategic Plan updates.

In order to inform 5YPP development and allocation of funds, the Transportation Authority shall report at least once every 5-years on the citywide geographic distribution of 2022 Sales Tax allocations and the distribution of projects located in [Equity Priority Communities EPCs](#) and/or benefiting disadvantaged populations

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Designated agencies shall be eligible for planning funds from the relevant Expenditure Plan programs for the purpose of completing the development of the 5YPP.

Sponsoring agencies will be encouraged to explore alternative and non-traditional methods for project and service delivery where they offer opportunities for increased cost-effectiveness and/or shortened project delivery timelines.

As part of the Strategic Plan development process, the Transportation Authority shall adopt, issue, and update detailed guidelines for the development of 5YPPs.

- C. Project Delivery Oversight.** The Transportation Authority Board shall adopt project delivery oversight guidelines for major capital projects to be funded by the 2022 Sales Tax. The guidelines shall consider the total cost and complexity of a project in setting the definition of a major capital project. Objectives of these guidelines shall include supporting the cost effective and timely delivery of projects funded wholly or in part by the 2022 Sales Tax. Transportation Authority staff shall prepare a report at least annually, to the Transportation Authority Board, to communicate the status of these projects.
- D. Funding Priority Levels.** Each 2022 Expenditure Plan program shall be funded using 2022 Sales Tax revenues up to the total amount designated for that program in Priority 1. If, after programming all Priority 1 funds to every program in a subcategory, the latest Strategic Plan forecasts available revenues from the 2022 Sales Tax in excess of Priority 1 levels, the Transportation Authority Board may allow programming of Priority 2 funds within the subcategory, subject to the program dollar amount caps for Priority 2 established in the 2022 Expenditure Plan. If, after programming at least 80% of Priority 2 funds, the latest Strategic Plan forecasts available revenues from the 2022 Sales Tax in excess of Priority 2 levels, the Transportation Authority Board may allow programming of revenues in excess of Priority 2 levels to programs in the Expenditure Plan as long as the percent of 2022 Sales Tax revenues designated for each category is maintained in compliance with the prioritization provisions set forth in Sections 2B, 5.B., and 5.D.
- E. Cost Savings and Remaining Funds.** If the eligible sponsoring agency or agencies complete delivery of a 2022 Expenditure Plan program or legacy project or determine that they will no longer pursue implementation of the program or legacy project with 2022 Sales Tax funds, the Transportation Authority Board may use any remaining 2022 Sales Tax funds in that program to fund one or more programs in the same category that would otherwise be in compliance with the prioritization provisions set forth in Sections 2B, 5.B. and 5.D. To do so, the Transportation Authority Board must first hold a public hearing on the matter and then not sooner than 30 days after the hearing, the Transportation Authority Board may, by a 2/3 vote, direct all or a portion of the remaining funds to one or more Expenditure Plan programs with the same category.

The following abbreviations are used in the 2022 Expenditure Plan:

BART – San Francisco Bay Area Rapid Transit District; EP – Expenditure Plan; ~~GGHBTD~~-~~GGBHTD~~ – Golden Gate Bridge, Highway & Transportation District; M – Million; N/A – Not Applicable; PCJPB – Peninsula Corridor Joint Powers Board or Caltrain; Planning – San Francisco Planning Department; Port of SF – Port of San Francisco; SAS – Sanitation and Streets Department*; SFCTA – San Francisco County

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Transportation Authority; SFE - San Francisco Department of Environment; SFMTA - San Francisco Municipal Transportation Agency; SFPW - San Francisco Public Works; TBD - To Be Determined; TIMMA - Treasure Island Mobility Management Agency; TJPA - Transbay Joint Powers Authority

*On November 3, 2020, San Francisco voters approved Proposition B, which amended the San Francisco Charter to create a Department of Sanitation and Streets to succeed to specific duties currently performance by San Francisco Public Works. Per Board of Supervisors Motion 21-181, approved December 14, 2021, the effective date for this transition is October 1, 2022.

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Attachment 1. Expenditure Plan Advisory Committee Roster

Amandeep Jawa, Chair	Advocacy: Environment
Anni Chung, Vice Chair	Advocacy: Seniors and People with Disabilities
Jay Bain	Neighborhoods/Communities
Rosa Chen	Equity Priority Community/Community Advisory Committee
Majeid Crawford	Equity Priority Community
Zack Deutsch-Gross	Advocacy: Transit
Jessie Fernandez	Advocacy: Equity
Mel Flores	Equity Priority Community
Rodney Fong	Business/Civic: Large Business
Sharky Laguana	Business/Civic: Small Business
Aaron P. Leifer	Neighborhood/Community
Jessica Lum	Business/Civic: Tourism/Visitors
Jodie Medeiros	Advocacy: Walk
Maryo Mogannam	Business/Civic: Small Business
Maelig Morvan	Neighborhood/Community
Susan Murphy	Equity Priority Community
Calvin Quick	Advocacy: Youth
Pi Ra	Advocacy: Seniors and People with Disabilities
Maurice Rivers	Equity Priority Community
Eric Rozell	Equity Priority Community
Earl Shaddix	Equity Priority Community
Yensing Sihapanya	Equity Priority Community
Sujata Srivastava	Business/Civic: Civic
Wesley Tam	Neighborhood/Community
Kim Tavaglione	Business/Civic: Labor
Joan Van Rijn	Neighborhood/Community
Christopher White	Advocacy: Bike
Casandra Costello	Alternate: Business/Civic: Tourism/Visitors
Cathy de Luca	Alternate: Advocacy: Seniors and People with Disabilities
Daniel Herzstein	Alternate: Business/Civic: Large Business
Sasha Hirji	Alternate: Advocacy: Youth
Melvin Parham	Alternate: Equity Priority Community
Maribel Ramirez	Alternate: Equity Priority Community



Memorandum

AGENDA ITEM 6

DATE: March 4, 2022

TO: Transportation Authority Board

FROM: Maria Lombardo – Chief Deputy Director

SUBJECT: 03/08/2022 Board Meeting: Endorse the 2022 Expenditure Plan for the Reauthorization of the Local Sales Tax for Transportation

RECOMMENDATION ☐ Information ☒ Action

Endorse the 2022 Expenditure Plan for the reauthorization of the local sales tax for transportation.

SUMMARY

At the direction of the Board, we have been working to develop a new Expenditure Plan for the half-cent transportation sales tax. To support this effort, the Board approved establishment of a 27-member Expenditure Plan Advisory Committee (EPAC) to help shape the new Expenditure Plan. On February 24, the EPAC unanimously voted to recommend approval of the 2022 Expenditure Plan (Attachment 1 to the resolution) to the Board. The 2022 Expenditure Plan would be funded by a 30-year extension of the existing half-cent sales tax to 2053, to fund the programs identified in the plan. The Expenditure Plan includes two revenue forecasts, a conservative forecast at \$2.378 billion and a more optimistic forecast at \$2.598 billion (both in 2020 \$s). This memo provides an overview of the plan development process, highlights of the 2022 Expenditure Plan, and a summary of next steps, including required approvals by the Metropolitan Transportation Commission (MTC) and the Board of Supervisors that are needed to place a measure on the November 8, 2022 ballot for the reauthorization of the half-cent sales tax to fund the 2022 Expenditure Plan. The measure would require a 2/3 majority vote to pass.

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



BACKGROUND

The half-cent sales tax for transportation was first approved by San Francisco voters in 1989 (Prop B) and then extended by voters in 2003 along with the adoption of the new Prop K Expenditure Plan, which is currently in place. Since then, the Transportation Authority has directed nearly \$2 billion in half-cent sales tax funding citywide and used those dollars to leverage other federal, state, regional and local dollars for transportation improvements.

The half-cent sales tax generates about \$110 million per year (pre-pandemic) and helps fund transportation projects large and small across the city. Major capital investments have included the purchase of new Muni buses and light rail vehicles, Salesforce Transit Center, the electrification of Caltrain (under construction), Muni Central Subway, and reconstruction of Doyle Drive, now known as Presidio Parkway. It also makes a big difference in people's lives through smaller projects like traffic calming, street repaving projects, paratransit service for seniors and persons with disabilities, protected bicycle lanes, and new and upgraded signals.

DISCUSSION

There are several reasons to bring a new Expenditure Plan and sales tax extension to the voters now, rather than waiting until Fiscal Year 2033/34 when the existing Prop K Expenditure Plan expires:

- All but one of the major capital projects in the current plan are done or under construction.
- Several programs have advanced funds to enable early benefits and are now running out of money.
- The sales tax provides an important source of funding for projects that can support the city's economic recovery and maintain or create jobs.
- San Francisco has new and emerging transportation priorities that are being developed through our countywide plan update, the San Francisco Transportation Plan 2050, part of ConnectSF.
- Sales tax funds serve as seed funding for planning and project development, and as the local match needed to secure competitive grants at the federal, state, and regional level.

Outreach and Engagement. Over the past year and a half, Transportation Authority staff have worked with partner agencies and engaged with communities across San Francisco to inform the development of the 2022 Expenditure Plan. In addition, the 27-member EPAC met 11 times from September 2021 through February 2022. The roster of EPAC members, including alternates, is located on the last page of the 2022 Expenditure Plan (Attachment 1 to the Resolution).



During prior presentations to the Board, we have described the outreach and engagement strategy for the development of the 2022 Expenditure Plan and given updates on input received to date. Our strategy was multifaceted and drew on lessons learned from other projects at the Transportation Authority to help ensure that we heard from folks who may be disproportionately affected by the sales tax while being respectful of the organizations that serve low-income communities and communities of color, many of which are stretched thin right now due to the lengthy pandemic. Enclosure 1 provides a summary of all the outreach completed to date, including how community input has been used to inform recommendations for the 2022 Expenditure Plan.

EPAC agendas and other meeting materials, including meeting minutes, are posted online at the project website (www.sfcta.org/ExpenditurePlan) and on the Transportation Authority's meetings, agendas and events calendar (www.sfcta.org/events).

We are very grateful to the EPAC members and alternates who have dedicated their time and energy toward this important effort. We are also appreciative of the time and effort our partner agencies have contributed to supporting the EPAC discussions.

Plan Development Process: EPAC Summary. To facilitate discussion, Transportation Authority staff presented a strawman proposal for the expenditure plan early in the EPAC meeting process, including funding levels and program descriptions. The programs are relatively broad, similar to the programs in the Prop K Expenditure Plan, and describe the types of projects that can be funded, identify eligible sponsor agencies, set sales tax funding levels, and assumptions about leveraging of other funds. The strawman proposal drew on lessons learned from Prop K, feedback from the outreach and engagement process, the San Francisco Transportation Plan update, other ConnectSF work (e.g., Transit Strategy, Streets and Freeways Strategy) and other city and sponsor agency plans.

Over the course of 11 meetings, the EPAC had discussions about all the proposed programs and funding needs from project sponsors, deliberated over potential policy revisions for the new expenditure plan, and debated relative funding levels for the different programs. The EPAC's discussions were broad, but two topics were a constant focus: how to address equity in the plan, and relative funding levels for the plan's various programs.

On the topic of equity, the EPAC focused both on the types of projects that would be eligible for funding in the new Expenditure Plan and on the process for identifying which specific projects would be funded from each program after the plan is approved by the voters. With respect to the latter, the EPAC added language to the project selection process (the 5-Year Prioritization Programs or 5YPPs) to ensure that Equity Priority Communities and other disadvantaged communities, specifically including communities historically harmed by displacement, transportation policies, and projects that utilized eminent domain, be given priority in the project selection process. The EPAC also strengthened the community support criterion in the prioritization process and added a new requirement that the Transportation Authority report on the distribution of sales tax allocations both looking at citywide



geographic distribution, and at projects in Equity Priority Communities and/or benefitting disadvantaged populations and use this data to inform the 5YPP project selection process.

To aide in their deliberations regarding relative funding levels for each program, the EPAC requested that Transportation Authority staff bring different funding scenarios to their meetings for discussion. This started with the EPAC using an informal Zoom poll to identify programs where there was a high desire to increase funding, and programs where members were comfortable decreasing funding levels, if needed, in order to fund other priorities. After reviewing several funding scenarios, for the EPAC's last meeting, members specifically requested scenarios that would increase funding for the Safer and Complete Streets, Paratransit, and BART Core Capacity programs, with one member and public commenters seeking increased funding for planting new trees. In order to increase funding for those programs, several EPAC members expressed a desire to decrease funding for the Caltrain Downtown Extension, which was the second largest program at \$316 million after Muni Maintenance. We had originally included the \$16 million as legacy or carry-forward Prop K funding commitment for the Downtown Extension program based on the timing of when the funds were needed. However, to facilitate EPAC deliberations, we discussed this funding with TJPA staff and agreed that we could work together to ensure that the funds are allocated under the Prop K program prior to the effective date of the new measure. This gave the EPAC the opportunity to shift \$10 to \$16 million from the Caltrain Downtown Extension program to other programs depending on which scenario they were considering.

At the final meeting of the EPAC, in a straw poll, the majority of EPAC members (18 out of 27 total members) preferred to distribute the full \$16 million from the Caltrain Downtown Extension to other programs. In particular, after using \$10 million to increase the BART Core Capacity program, they used \$6 million of that funding to equally increase funding for Safer and Complete Streets, Paratransit, and Transit Enhancements. A minority of EPAC members (5 out of 27) preferred to keep that \$6 million in funding for the Caltrain Downtown Extension, in a scenario that members felt was more balanced. However, those members ultimately supported the final 2022 Expenditure Plan, distributing all \$16 million as noted above, in a unanimous vote.

The final plan represents a compromise where some EPAC members didn't get everything they wanted, but the group recognized that importance of updating the Expenditure Plan to reflect current priorities and to enable the continuation of the sales tax to fund them. Multiple members noted the need for additional revenues to support transportation and a desire to do more to advance equity, though the new plan is a step in the right direction.

The 2022 Expenditure Plan Structure. Like the current Prop K Expenditure Plan, the 2022 Expenditure Plan guides the way the half-cent sales tax program is administered by identifying eligible project types and activities, designating eligible sponsoring agencies, and establishing limits on sales tax funding by expenditure plan program. It also sets expectations for leveraging of sales tax funds with other federal, state, regional, and local dollars to fully



fund the expenditure plan programs and projects and includes policies for program administration. Many of the policies and programs in the 2022 Expenditure Plan are consistent with Prop K, but the EPAC has left its distinct mark on the 2022 Expenditure Plan as noted above.

The 2022 Expenditure Plan is composed of five major funding categories as shown in Attachment 1. The plan is primarily programmatic in nature, with few named projects since it is a 30-year plan supporting many ongoing programs like transit maintenance and street resurfacing where the specific locations of improvements will be identified over time through the 5YPP process. The overwhelming majority of the 2022 Expenditure Plan funds capital projects, with the notable exception of the paratransit program that provides transportation services for seniors and persons with disabilities who cannot ride regular fixed route transit.

A brief description of each category is provided below. Detailed descriptions are found in Section 4 of the 2022 Expenditure Plan (Attachment 1 to the resolution, starting on page 8). The percentage after the category name shows the relative share of sales tax revenues that each of the 5 categories would receive over the life of the Expenditure Plan.

Major Transit Projects (22.6%) includes programs that are intended to increase rider capacity, transit reliability and speed on the existing transit systems. This includes Muni Forward-type investments; improvements to allow more frequent and/or longer trains on both the BART and Muni systems; and the Caltrain Downtown Extension to Salesforce Transit Center.

Transit Maintenance and Enhancements (41.2%) is the largest category, with transit maintenance (mostly Muni, but also BART, Caltrain, and ferry) receiving nearly 40% of total revenues. These types of investments are crucial to ensuring that the transit systems are safe, reliable, and functional. This category also includes funding for accessibility and other station improvements, climate resiliency improvements to facilities, and early phases of project development for the next generation of transit projects such as those included in the ConnectSF Transit Strategy (e.g., extending the Central Subway north, 19th Avenue/Geary Rail, Link21, express buses).

Paratransit (11.4%) is the only operating program in the 2022 Expenditure Plan (as it was in the Prop K Expenditure Plan), reflecting the important role it plays for seniors and people with disabilities in San Francisco. The EPAC increased its share of funding from 8.6% in Prop K to 11.4% recognizing that cost and demand have grown over time and that San Francisco's population is aging.

Streets and Freeways (18.9%) includes significant investments in projects that will improve the safety of our roadways for all users such as new crosswalks, traffic calming, bicycle facilities, and curb ramps, as well as funds to plant new trees in public rights of way. There is also funding for maintenance such as street repaving, traffic signal upgrades, and sidewalk repair. The category includes a small amount of funding for early phases of project



development for major street and freeway redesigns such as those included in the ConnectSF Streets and Freeways Strategy (e.g., the Alemany maze realignment, filling the Geary tunnel, Brotherhood Way pedestrian crossing improvements).

Transportation System Development and Management (5.9%) includes transportation demand management funding, for cost-effective projects that encourage mode shift to sustainable modes like transit, cycling or walking, or travel time shifts to less congested times. This category also codifies the Transportation Authority's existing Neighborhood Transportation Program, funding neighborhood-scale planning and the implementation of recommendations from those plans. The category includes two new programs: an Equity Priority Transportation Program, which would similarly fund planning and implementation but focused on projects benefitting Equity Priority Communities or disadvantaged communities citywide; and a Development Oriented Transportation program to fund planning and implementation of projects in communities that are planning for growth and increased housing density for the first time in recent years, such as the parts of the west side of San Francisco with new Priority Development Areas in MTC's Plan Bay Area 2050.

The 2022 Expenditure Plan: Revenue Forecasts. The 2022 Expenditure Plan estimates revenues under two scenarios over the 30-year period, as shown in the cumulative column in the table below:

Table 1. 2022 Expenditure Plan 30-Year Revenue Forecasts (2020 \$'s)

Revenue Forecasts	Amount	Cumulative
Priority 1 (conservative)	\$2.378 billion	\$2.378 billion
Priority 2 (more optimistic)	+\$220 million	\$2.598 billion

These two forecasts are both intended to be reasonable estimates of future revenues, with relatively small variations in growth rates. The conservative projection, which corresponds to Priority 1 funding levels, uses an average annual growth rate of 2.1% and an inflation-based annual discount rate of 3%. The more optimistic projection, which corresponds to Priority 2 funding levels, uses an average growth rate of 2.6%, with an inflation-based discount of 3%. For reference, over the life of Prop K to date, the average annual growth rate has been 2.4%, while the average Bay Area inflation rate has been 2.5%. Throughout the 2022 Expenditure Plan, revenues and costs are shown in constant 2020 dollars.

If the proposed ballot measure is approved by 2/3s of San Francisco voters in November 2022, the 2022 Expenditure Plan would supersede or replace the existing Prop K Expenditure Plan on April 1, 2023. Prop K financial obligations would have first call on revenues from the reauthorized sales tax. The revenue forecasts have been reduced by an estimated \$550 million in Prop K financial liabilities. This includes the repayment of the 2017 sales tax revenue bond, revenues to cover remaining balances on current grant agreements, and an estimate of new allocations before the new measure takes effect.



The 2022 Expenditure Plan also includes the total expected funding for each program in the Expenditure Plan. This includes forecasted revenues from other local, regional, state and federal funding sources, based on the region's Plan Bay Area 2050 transportation revenue forecast that would be available to fund the types of projects eligible under the various program in the plan.

The \$2.6 billion in sales tax revenues projected to be available in the 2022 Expenditure Plan will play a key role in helping to attract the estimated \$23 billion in other funding sources (primarily capital funding sources, with the paratransit operating funds being the primary exception) expected to be available to San Francisco transportation projects over the 30-year plan period. This includes federal dollars for major transit capital projects like the BART and Muni Core Capacity investments and the Caltrain Downtown Rail Extension, state and regional Active Transportation Program grants for safe and complete streets investments, state gas tax funding for local streets and roads maintenance, and local General Obligation bond proceeds for SFMTA transit maintenance and safer street projects.

Sales tax funds provide required local match funds and often help pay for the early planning and project development work that make projects competitive for discretionary grants to fund design and implementation.

Next Steps. The March 8 Transportation Authority Board meeting serves as the required public hearing on the 2022 Expenditure Plan. Pursuant to PUC Section 131052, the MTC is required to approve the expenditure plan before it can be placed on the ballot by the San Francisco Board of Supervisors. We have been keeping MTC apprised of the plan development process from its inception, and they are prepared to agendize its approval at April meetings of the Planning Committee and full Commission. Following MTC approval, an ordinance can be introduced at the Board of Supervisors that would place a measure on the November 8, 2022 ballot to continue in effect the existing half-cent transportation sales tax for 30-years to fund the programs in the 2022 Expenditure Plan. As noted above, the measure would require 2/3 voter approval to pass.

The anticipated dates for the next steps in the approval process are listed below. Meeting dates will be posted on the project website (www.sfcta.org/ExpenditurePlan) as soon as they are finalized.

- Transportation Authority Board
 - March 8 - Public Hearing, first approval
 - March 22- Final action
- Metropolitan Transportation Commission (MTC)
 - April 8 - MTC Planning Committee
 - April 27 - MTC Commission
- Board of Supervisors (Dates TBD)



- o May (introduction) – June/July (approvals)
- November 8, 2022 Election

If approved, the operative date of the 2022 Expenditure Plan would be April 1, 2023. The Transportation Authority would continue to administer the Prop K Expenditure Plan until the 2022 Expenditure Plan goes into effect.

FINANCIAL IMPACT

We have budgeted about \$620,000 for the development of the new Expenditure Plan, which includes staff, legal and consultant costs, most of which have already been incurred. If the Board of Supervisors places the sales tax reauthorization measure on the ballot, we may be responsible for covering the administrative costs of placing the measure on the ballot (e.g. paying for its inclusion in the voter pamphlet). We are working with the Department of Elections and the Clerk of the Board of Supervisors' Office to confirm a cost estimate by the March 8 Transportation Authority Board meeting. These costs will be covered by the new measure if it passes and by Prop K if it does not. We will reflect these costs in the mid-year budget revision and next year's budget as relevant.

CAC POSITION

The Community Advisory Committee (CAC) was briefed on the draft Expenditure Plan at its February 23, 2022, meeting, but did not take an action given that the EPAC's final action was still pending. The CAC has received regular updates on the process to develop a new Expenditure Plan from member Rosa Chen, who represents the CAC on the EPAC, and periodic presentations from staff.

SUPPLEMENTAL MATERIALS

- Attachment 1 – 2022 Expenditure Plan Summary Pie Chart
- Attachment 2 – 2022 Expenditure Plan Priority 1 and Priority 2 Funding Levels
- Attachment 3 – Presentation
- Enclosure 1 – Outreach and Engagement Summary

*The proposed 2022 Expenditure Plan is included as Attachment 1 to the resolution.



Recommended 2022 Expenditure Plan

\$2.6 billion (2020 \$s) in sales tax revenues over 30 years*

TRANSIT MAINTENANCE & ENHANCEMENTS

41.2%

Muni, BART, Caltrain, Ferry
Maintenance, rehabilitation and replacement
Station/Access improvements
Next generation transit planning

MAJOR TRANSIT PROJECTS

22.6%

Muni Bus/Train Reliability & Efficiency Improvements
Muni and BART Core Capacity
Caltrain Downtown Extension

TRANSPORTATION SYSTEM DEVELOPMENT & MANAGEMENT

5.9%

Transportation demand management
Neighborhood and equity-focused
planning and implementation

PARATRANSIT

11.4%

Transit services for seniors and
people with disabilities

STREETS & FREEWAYS

18.9%

Pedestrian and bicycle improvements
Signals and traffic calming
Street repaving
Major street and freeway redesign planning

* Includes both Priority 1 (conservative forecast) and Priority 2 (more optimistic) revenues.

**Attachment 2 - 2022 Expenditure Plan
Priority 1 and Priority 2 Funding**

February 24, 2022

Amounts in millions of 2020 \$s					
2022 Expenditure Plan Programs	Eligible Agencies	Priority 1	Priority 2	Total	% of Total
MAJOR TRANSIT PROJECTS					
Muni Reliability and Efficiency Improvements	SFMTA	\$110.0		\$110.0	4.2%
Muni Rail Core Capacity	SFMTA	\$50.0	\$7.0	\$57.0	2.2%
BART Core Capacity	BART	\$100.0		\$100.0	3.8%
Caltrain Service Vision: Capital System Capacity Investments	PCJPB	\$0.0	\$10.0	\$10.0	0.4%
Caltrain Downtown Rail Extension and Pennsylvania Alignment	TJPA, SFCTA	\$300.0	\$10.0	\$310.0	11.9%
TRANSIT MAINTENANCE & ENHANCEMENTS					
Muni Maintenance	SFMTA	\$784.0	\$41.0	\$825.0	31.8%
BART Maintenance	BART	\$35.0	\$10.0	\$45.0	1.7%
Caltrain Maintenance	PCJPB	\$100.0		\$100.0	3.8%
Ferry Maintenance	Port of SF, GGBHTD	\$5.0		\$5.0	0.2%
Transit Enhancements	BART, PCJPB, SFMTA, TIMMA	\$29.0	\$7.0	\$36.0	1.4%
Bayview Caltrain Station	PCJPB, SFCTA, SFMTA, SFPW	\$27.0		\$27.0	1.0%
Mission Bay Ferry Landing	Port of SF	\$5.0		\$5.0	0.2%
Next Generation Transit Investments	BART, PCJPB, SFCTA, SFMTA	\$22.0	\$5.0	\$27.0	1.0%
PARATRANSIT					
Paratransit	SFMTA	\$227.0	\$70.0	\$297.0	11.4%

**Attachment 2 - 2022 Expenditure Plan
Priority 1 and Priority 2 Funding**

February 24, 2022

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Amounts in millions of 2020 \$s					
2022 Expenditure Plan Programs	Eligible Agencies	Priority 1	Priority 2	Total	% of EP
STREETS & FREEWAYS					
Street Resurfacing, Rehabilitation and Maintenance	SAS, SFPW	\$105.0		\$105.0	4.0%
Pedestrian and Bicycle Facilities Maintenance	SAS, SFMTA	\$19.0		\$19.0	0.7%
Traffic Signs & Signals Maintenance	SFMTA	\$90.0		\$90.0	3.5%
Safer and Complete Streets	SFCTA, SFMTA, SFPW	\$152.0	\$35.0	\$187.0	7.2%
Curb Ramps	SFPW	\$29.0		\$29.0	1.1%
Tree Planting	SAS	\$20.0	\$4.0	\$24.0	0.9%
Vision Zero Ramps	SFCTA, SFMTA	\$8.0		\$8.0	0.3%
Managed Lanes and Express Bus	SFCTA, SFMTA	\$10.0		\$10.0	0.4%
Transformative Freeway and Major Street Projects	Planning, SFCTA, SFMTA, SFPW	\$20.0		\$20.0	0.8%
TRANSPORTATION SYSTEM DEVELOPMENT & MANAGEMENT					
Transportation Demand Management	BART, PCJPB, SFCTA, SFE, SFMTA, TIMMA	\$18.0	\$5.0	\$23.0	0.9%
Neighborhood Transportation Program	Planning, SFCTA, SFMTA, SFPW	\$41.0	\$5.0	\$46.0	1.8%
Equity Priority Transportation Program	Planning, SFCTA, SFMTA, SFPW	\$42.0	\$5.0	\$47.0	1.8%
Development-Oriented Transportation	BART, PCJPB, Planning, SFCTA, SFMTA, SFPW	\$20.0	\$6.0	\$26.0	1.0%
Citywide / Modal Planning	Planning, SFCTA, SFMTA	\$10.0		\$10.0	0.4%
TOTALS		\$2,378.0	\$220.0	\$2,598.0	100%

**Attachment 2 - 2022 Expenditure Plan
Priority 1 and Priority 2 Funding**

February 24, 2022

Amounts in millions of 2020 \$s				
Category Sub-totals:	Priority 1	Priority 2	Total	% of Total
Major Transit Projects	\$560.0	\$27.0	\$587.0	22.6%
Transit Maintenance & Enhancements	\$1,007.0	\$63.0	\$1,070.0	41.2%
Paratransit	\$227.0	\$70.0	\$297.0	11.4%
Streets and Freeways	\$453.0	\$39.0	\$492.0	18.9%
Transportation System Development & Management	\$131.0	\$21.0	\$152.0	5.9%
Totals	\$2,378.0	\$220.0	\$2,598.0	100.0%

Endorse the 2022 Expenditure Plan for the Reauthorization of the Local Sales Tax for Transportation



San Francisco
County Transportation
Authority

Agenda Item #6

March 8, 2022

Agenda

Background

Outreach and Engagement
Update

Expenditure Plan Advisory
Committee (EPAC) Update

Recommendation: Endorse the
2022 Expenditure Plan

Next Steps



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Half-Cent Sales Tax New Expenditure Plan



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Targeting a
potential
November 2022
election



Would keep the
same half-cent
sales tax for
transportation,
and...



Would approve
a new
transportation
sales tax
Expenditure Plan



All but one of the major capital projects are done or under construction, and several programs are running out of money

Sales tax provides a significant source of funding, which can support the city's COVID recovery

Why now?

San Francisco has new and emerging priorities

Allows us to use sales tax as local match to federal, state, and other funding

Developing a New Expenditure Plan



Outreach Plan includes:

Community
Interviews

Complete

Non-English
Focus Groups

Complete

Join existing
community
meetings

Ongoing

Online Survey

Complete

Expenditure
Plan Advisory
Committee

Complete

Traditional,
social and
multi-lingual
media

Ongoing

Town Halls

Complete

Voter Opinion
Survey

Planned Spring 2022

What We Heard: Overall Themes



Transit

- Improve transit reliability
- Improve customer experience, especially at bus stops
- Better connections
- Additional service

Safety & Accessibility

- Primary concern for many
- Improve pedestrian & bicyclist safety
- Improve accessibility for seniors & people with disabilities

Equity

- Focus investments in Equity Priority Communities and serving people with low incomes
- Multilingual outreach
- Affordability concerns

Neighborhoods

- Localize engagement and transportation solutions
- Better connections between neighborhoods
- Parking and congestion



- Established by the Board in Summer 2021
- 27 members from neighborhoods, community groups, advocacy organizations, and business and civic interests
- Met 11 times between September 2021 - February 2022
- Final action on February 24: Recommended that the Transportation Authority Board approve the 2022 Expenditure Plan

60 Benefits of a New Expenditure Plan



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Safer
streets



Smoother
streets



Reliable transit
& paratransit



Less congestion
& crowding



Improved air
quality



Advancing equity throughout

Recommended 2022 Expenditure Plan



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\$2.6 billion (2020 \$s) in sales tax revenues over 30 years*

TRANSIT MAINTENANCE & ENHANCEMENTS

41.2%

Muni, BART, Caltrain, Ferry
Maintenance, rehabilitation and replacement
Station/Access improvements
Next generation transit planning

MAJOR TRANSIT PROJECTS

22.6%

Muni Bus/Train Reliability & Efficiency Improvements
Muni and BART Core Capacity
Caltrain Downtown Extension

TRANSPORTATION SYSTEM DEVELOPMENT & MANAGEMENT

5.9%

Transportation demand management
Neighborhood and equity-focused
planning and implementation

PARATRANSIT

11.4%

Transit services for seniors and
people with disabilities

STREETS & FREEWAYS

18.9%

Pedestrian and bicycle improvements
Signals and traffic calming
Street repaving
Major street and freeway redesign planning

* Includes both Priority 1 (conservative forecast) and Priority 2 (more optimistic) revenues.

Recommended 2022 EP/Prop K Comparison



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Investment Type	Prop K Priority 1 (P1)	Prop K P1+P2	2022 EP P1	2022 EP P1+P2	Change from Prop K
Transit Maintenance	39.8%	40.4%	39.6%	38.1%	↓
Major Transit Improvements & Enhancements	26.0%	25.1%	26.8%	26.2%	↑
Safe & Complete Streets	10.5%	10.4%	11.7%	12.8%	↑
Streets Maintenance (includes signs and signals)	10.6%	10.7%	9.0%	8.2%	↓
Paratransit (operating support)	8.6%	8.6%	9.5%	11.4%	↑
Transportation Demand Management, Citywide & Neighborhood Planning	1.2%	1.3%	1.8%	1.8%	↑
Freeway Safety, Operations, Redesign (planning)	3.4%	3.4%	1.6%	1.5%	↓

Percentages may not sum to 100% due to rounding errors. EP stands for Expenditure Plan. P1 and P2 stand for Priority 1 and Priority 2 revenues.



Policy changes include (slide 1 of 2):

1. Update the 5YPP* Project Prioritization Process:
 - a. Include an Equity Priority Community/disadvantaged populations criterion
 - Disadvantaged communities include *communities historically harmed by displacement, transportation policies, and projects that utilized eminent domain*
 - b. Strengthen the community support criterion to ask for level and diversity of support, specifically including support from disadvantaged communities



Policy changes include (slide 2 of 2):

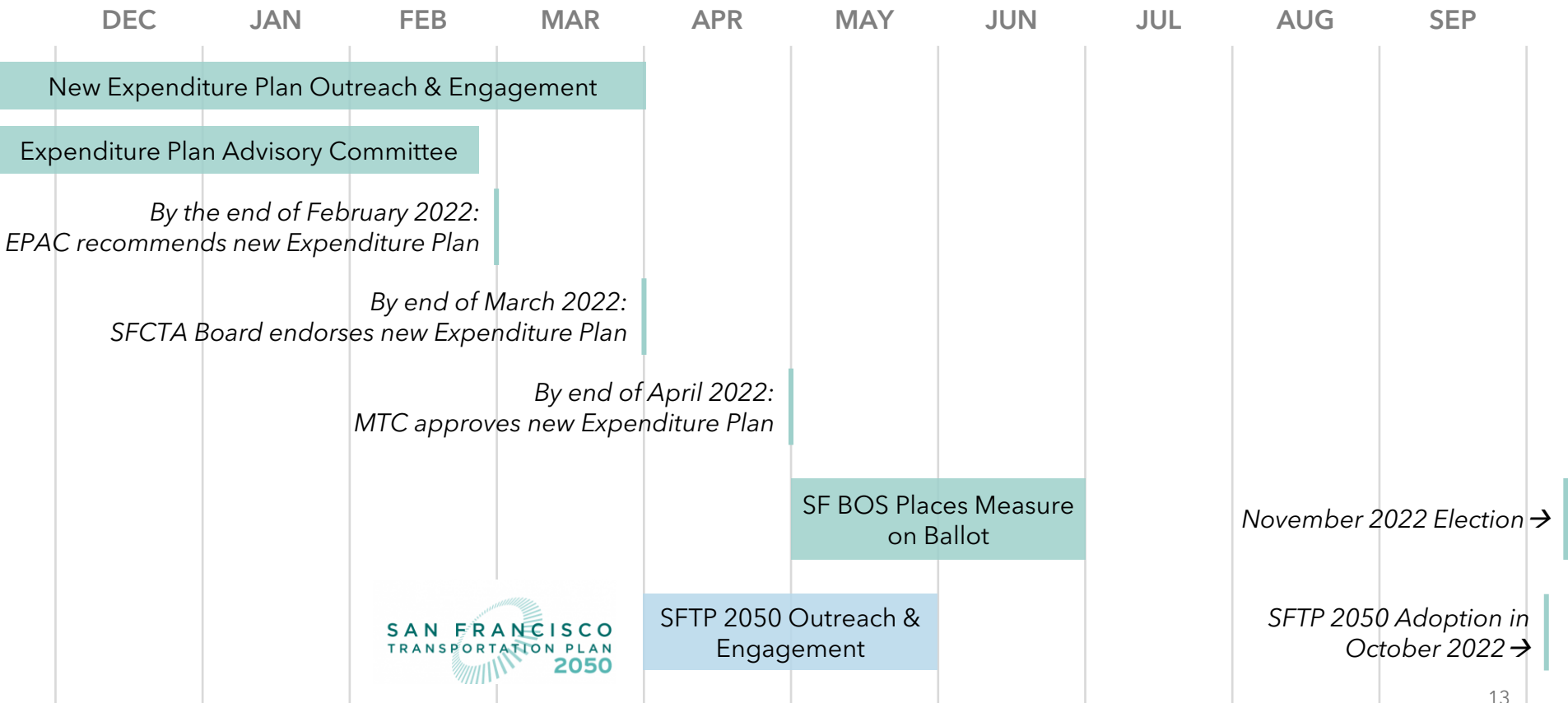
2. New required reporting on the distribution of allocations for transparency and accountability, both:
 - Citywide geographic distribution (e.g. by Supervisorial district)
 - Distribution of projects in Equity Priority Communities and/or benefitting disadvantaged populations
3. New project delivery oversight requirement:
 - Requires the Transportation Authority to adopt project delivery oversight guidelines for major capital projects to be funded by the sales tax, including annual reporting

2022 Expenditure Plan Schedule



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66 2022 Expenditure Plan: Next Steps



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Transportation Authority Board:

- March 8 - Public Hearing, First Read
- March 22 - Final action

Metropolitan Transportation Commission (MTC):

- April 8 - MTC Planning Committee
- April 27 - MTC Commission

Board of Supervisors (Dates TBD):

- May (introduction) - June/July (approvals)

For more information



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- Visit: sfcta.org/ExpenditurePlan
- Email: ExpenditurePlan@sfcta.org

Thank you. Any Questions?

<https://www.sfcta.org/ExpenditurePlan>



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RESOLUTION ADOPTING SUPPORT POSITIONS ON ASSEMBLY BILL (AB) 2197
(MULLIN) AND AB 2336 (TING AND FRIEDMAN)

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 2197 (Mullin) and AB 2336 (Ting and Friedman), as shown in Attachment 1; and

WHEREAS, At its March 8, 2022 meeting, the Board reviewed and discussed AB 2197 (Mullin) and AB 2336 (Ting and Friedman); now, therefore, be it

RESOLVED, That the Transportation Authority hereby adopts new support positions on AB 2197 (Mullin) and AB 2336 (Ting and Friedman); and be it further

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

Attachment:

1. State Legislation - March 2022

San Francisco County Transportation Authority

State Legislation - March 2022

(Updated March 3, 2022)

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

Staff is recommending a new support position on Assembly Bill (AB) 2197 (Mullin) and AB 2336 (Ting and Friedman) and adding Senate Bill (SB) 917 (Becker), SB 922 (Wiener), SB 1049 (Dodd), and SB 1050 (Dodd) to the watch list as show in **Table 1**.

Table 2 shows the status of active bills on which the Board has already taken a position or has been monitoring.

Table 1. New Recommended Position

Recommended Positions	Bill # Author	Title and Update
Support	AB 2197 Mullin	<p>Caltrain electrification project: funding.</p> <p>This bill would appropriate \$260 million from the General Fund to the Peninsula Corridor Joint Powers Board for the purpose of completing the Caltrain Electrification Project.</p> <p>If approved, this amount could be combined with Caltrain bond financing to close the \$410 million project funding gap. However, with the Governor's proposal to direct billions in budget surplus funds to transportation as part of his January budget proposal, we anticipate project-specific funding requests may not advance at this time. However, we recommend registering support for the bill now to signal support for the project and raise awareness in the state legislature.</p>
Support	AB 2336 Ting D Friedman D	<p>Vehicles: Speed Safety System Pilot Program.</p> <p>This bill would authorize, until January 1, 2028, the cities of Los Angeles, Oakland, San Jose, San Francisco, and two others (TBD) to establish a Speed Safety System Pilot Program. The bill would require the adoption of a Speed Safety System Use Policy and a Speed Safety System Impact Report before implementing the program as well as a public information campaign at least 30 days before implementing the program. The bill would also require the participating cities to develop uniform guidelines for, among other things, the processing and storage of confidential information, including all photographic, video, or other visual or administrative records. For the first 30 days of the program, only warning notices, not fines, could be issued, and after that, violations would be subject only to civil penalties, with a diversion program for indigent violation recipients. The bill specifies a notification process for violations as well as an appeals process. Cities participating in the pilot program would be required to submit reports to the Legislature that evaluate the speed safety system to determine the system's impact on street safety and economic impact on the communities where it is utilized.</p> <p>Like AB 550 (Chiu), the similar speed safety camera bill that failed to advance last year, the San Francisco Municipal Transportation Agency (SFMTA) is strongly supportive of this bill and has been working with the authors on its development. They anticipate requesting a support position from the SFMTA Board and the City's State Legislation Committee.</p>

San Francisco County Transportation Authority

Recommended Positions	Bill # Author	Title and Update
Watch	SB 917 Becker D	<p>Seamless Transit Transformation Act.</p> <p>This bill would require the Metropolitan Transportation Commission (MTC) to adhere to a number of different requirements to advance the Transit Transformative Action Plan, which was approved when the regional Blue Ribbon Transit Recovery Task Force concluded last year. MTC would need to develop and adopt a Connected Network Plan, which would address connectivity issues across the region, including identifying key transit corridors and hubs, identifying ideal service levels with low income travelers in mind, identifying the capital and operating funds needed to implement the network, as well as potential governance issues. MTC would also have to adopt an integrated transit fare structure by December 31, 2023, and all Bay Area transit operators would have to comply with the proposal by July 1, 2024. Finally, MTC and transit operators would be required to develop and implement universal mapping and wayfinding and make real-time transit information available across all transit operators. If transit operators don't comply with any of these regional standards, they would not be eligible to receive key state funding for transit operations.</p> <p>While the action areas included in the bill are generally consistent with the issue areas addressed in the Transit Transformative Action Plan, it is prescriptive in some areas in advance of ongoing regional efforts to identify consensus solutions on how to best address them. It also sets deadlines to adopt outcomes that may not be achievable and endangers key operating funding for operators at a time where every dollar is needed as the region recovers from the pandemic. We have met with the project sponsor, Seamless Bay Area, and will engage with the author based on our analysis of the bill, our coordination with SFMTA and other transit operators, and feedback received from our commissioners. One of our main concerns is ensuring that San Francisco operators aren't disadvantaged in any redistribution of resources or other decisionmaking, especially given that San Francisco has, for a long time, significantly subsidized transit operations with local funding. Historically, many other jurisdictions across the region haven't invested in transit to the same extent, and they shouldn't benefit from that at the expense of cities that have been. We are also working with SFMTA to schedule an informational item on the Transit Transformative Action Plan at a future Board meeting.</p>

Recommended Positions	Bill # Author	Title and Update
Watch	SB 922 Wiener D	<p>California Environmental Quality Act: exemptions: transportation-related projects.</p> <p>This bill makes permanent the California Environmental Quality Act (CEQA) statutory exemptions authorized in SB 288 (Wiener, 2020), which will expire on January 1, 2023, and expands upon them. These exemptions would be available for transportation projects that are located entirely inside the public right of way and consistent with the state's greenhouse gas reduction and safety goals. Projects that were originally eligible under SB 288 would remain eligible, including walking and biking projects, transit priority projects, new bus rapid transit, bus, or light rail service, and zero-emission transit vehicle refueling projects. New types of projects that would become eligible under SB 922 include carpool lanes, installation of transit bulbs and boarding islands, and parking and transportation demand management. The bill does not exempt projects that add new auto capacity, and it requires use of skilled and trained labor. For eligible projects over \$100 million, the bill expands public and community participation requirements and requires the development of a cost-benefit business case, a racial and equity analysis, and a displacement risk analysis if 50% of the project is in a disadvantaged community, including recommended anti-displacement approaches.</p> <p>SFMTA has utilized the authority under SB 288 to accelerate delivery of a number of projects since January 1, 2021, including the Bayview Community Based Transportation Plan Quick Build Project, other quick build projects on Golden Gate Avenue, South Van Ness Avenue and Leavenworth Street and the Embarcadero Safety Project.</p>
Watch	SB 1049 Dodd D	<p>Transportation Resilience Program.</p> <p>The Bipartisan Infrastructure Law included a new Promoting Resilient Operations for Transformative, Efficient, and Cost-Saving Transportation (PROTECT) program for planning and implementation of projects that improve resilience of transportation infrastructure. A portion of these funds are appropriated to states via formula, with California anticipated to receive \$630 million over five years. This bill would establish the Transportation Resilience Program, to be funded with 100% of California's PROTECT funds as well as 15% of California's federal National Highway Performance Program funds. These are also distributed to states via formula and represent a significant share of California's highway funding, with an expected \$12.8 billion to be appropriated to the state over five years. The bill would authorize the California Transportation Commission to allocate funds from the new Transportation Resilience Program through a competitive process and would establish eligibility and prioritization criteria. Eligible climate adaptation planning and resilience improvements would address or mitigate the risk of recurring damage to, or closures of, the state highway system, other federal-aid roads, public transit facilities, and other surface transportation assets from extreme weather events, sea level rise, or other climate change-fueled natural hazards.</p> <p>Senator Dodd likely intends this new program to serve as a resource for the implementation of the SR-37 resiliency project (see SB 1050 (Dodd)), however it could also provide an opportunity for San Francisco resiliency projects, such as the Embarcadero Seawall or other SFMTA or BART priorities.</p>

San Francisco County Transportation Authority

Recommended Positions	Bill # Author	Title and Update
Watch	SB 1050 Dodd D	<p>State Route (SR) 37 Toll Bridge Act.</p> <p>This bill would create the SR-37 Toll Authority (Authority), which would be governed by the Bay Area Infrastructure Financing Authority (BAIFA) board. The bill would require the Authority to operate and maintain a tolling program on SR-37 and authorize the Authority to design and construct improvements to, among other things, help make the facility more resilient to sea level rise. The bill would authorize revenues from the toll bridge for specified purposes, including capital improvements to repair or rehabilitate the toll bridge, to expand toll bridge capacity, to improve toll bridge or corridor operations, to reduce the demand for travel in the corridor, and to increase public transit, carpool, vanpool, and nonmotorized options on the toll bridge or in the segment of State Route 37. The Authority would be charged with developing an expenditure plan and updating it every three years. The bill would require that the Authority's toll schedule provide a 50% discount to qualifying high-occupancy vehicles and between a 25% and 50%, inclusive, discount to low-income drivers who reside in the counties of Marin, Napa, Solano, or Sonoma.</p> <p>We will continue to monitor this bill, as it could serve as a model for a process to establish pricing/tolling authority, if the Transportation Authority Board and City of San Francisco act to pursue this in the future.</p>

San Francisco County Transportation Authority

Table 2. Bill Status for Positions Taken in the 2021-22 Session

Below are updates for the two-year bills for which the Transportation Authority took a position or identified as a bill to monitor through approval of a watch position. These bills were carried over from the first year of the 2021-22 session.

Bills that were chaptered, vetoed, or otherwise died last year have been removed from the table.

Adopted Positions / Monitoring Status	Bill # Author	Bill Title	Update to Bill Status ¹ (as of 02/28/2022)
Support	AB 117 Boerner Horvath D	Air Quality Improvement Program: electric bicycles. Makes electric bicycles eligible to receive funding from the Air Quality Improvement Program.	Senate Appropriations
	AB 455 Wicks D Coauthor: Wiener D	Bay Bridge Fast Forward Program. Authorizes the Bay Area Toll Authority to designate transit-only traffic lanes on the San Francisco-Oakland Bay Bridge.	Senate Transportation
Watch	ACA 1 Introduced by: Aguiar-Curry D Lorena Gonzalez D Chiu D Coauthors include: Wiener D Ting D	Local government financing: affordable housing and public infrastructure: voter approval. Amends the California Constitution to authorize local ad valorem property taxes to be approved by 55% of the voters if used for transit, streets and roads, and sea level rise protections.	Assembly Local Government
	SB 66 Allen D	California Council on the Future of Transportation: advisory committee: autonomous vehicle technology. Establishes an advisory committee to make recommendations regarding the deployment of autonomous vehicles.	Assembly Appropriations

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. Bill status at a House's "Desk" means it is pending referral to a Committee.



RESOLUTION ALLOCATING \$1,791,758 IN PROP K FUNDS, WITH CONDITIONS,
AND APPROPRIATING \$150,000 FOR THREE REQUESTS

WHEREAS, The Transportation Authority received three requests for a total of \$1,941,758 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 following Prop K Expenditure Plan categories: Other Transit Enhancements, Traffic Calming and Bicycle Circulation/ Safety; 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, SFMTA's Bike to Work Day 2022 project is consistent with the relevant 5YPP for its requested funding category; and

WHEREAS, The San Francisco Municipal Transportation Agency's (SFMTA's) requests for the Muni Metro Core Capacity Study and 20 MPH Speed Limit Reductions project require 5YPP amendments 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 \$1,791,758 in Prop K Funds, with conditions, and appropriating \$150,000 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 2021/22 budget to cover the proposed actions; and

WHEREAS, At its February 23, 2022 meeting, the Community Advisory Committee was briefed on the subject request and unanimously adopted a motion of support for the staff recommendation; now, therefore, be it

RESOLVED, That the Transportation Authority hereby amends the Prop K Other Transit Enhancements, Traffic Calming and Bicycle Circulation/ Safety 5YPPs, as detailed in the enclosed allocation request forms; and be it further

RESOLVED, That the Transportation Authority hereby allocates \$1,791,758 in Prop K Funds, with conditions, and appropriates \$150,000 for three requests, 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, the Prop K Strategic Plan and the 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 Received
2. Brief Project Descriptions
3. Staff Recommendations
4. Prop K Allocation Summaries - FY 2021/22

Enclosure:

Prop K Allocation Request Forms (3)

Attachment 1: Summary of Requests Received

						Leveraging			
Source	EP Line No./ Category ¹	Project Sponsor ²	Project Name	Current Prop K Request	Total Cost for Requested Phase(s)	Expected Leveraging by EP Line ³	Actual Leveraging by Project Phase(s) ⁴	Phase(s) Requested	District(s)
Prop K	16	SFMTA, SFCTA	Muni Metro Core Capacity Study	\$ 1,150,000	\$ 1,650,000	74%	30%	Planning	3, 4, 5, 6, 7, 8, 10, 11
Prop K	38	SFMTA	20 MPH Speed Limit Reductions	\$ 750,000	\$ 810,000	51%	7%	Construction	Citywide
Prop K	39	SFMTA	Bike to Work Day 2022	\$ 41,758	\$ 41,758	28%	0%	Construction	Citywide
TOTAL				\$ 1,941,758	\$ 2,501,758	66%	22%		

Footnotes

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

² Acronyms: SFCTA (San Francisco County Transportation Authority); 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, non-Prop AA, or non-TNC Tax 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
16	SFMTA, SFCTA	Muni Metro Core Capacity Study	\$ 1,150,000	<p>The Muni Metro Core Capacity Study will identify a package of projects to provide much-needed capacity and reliability improvements for Muni Metro. Together, selected strategies will provide Muni rail customers faster, longer trains, providing a more reliable quality of service for time-sensitive trips. The outcome of the Study will be a package of projects that would be eligible and competitive for a Federal Transit Administration (FTA) Core Capacity grant application to the Capital Investment Grant program, as well as further definition of investments along key surface segments of the Metro rail system with a focus on the M-line between West Portal and San Francisco State University.</p> <p>The Study will be conducted in two phases. Phase 1 includes but is not limited to prior study review, identifying performance targets, and an initial draft program of core capacity projects. Phase 2 would use inputs from Phase 1 to refine and advance a program of feasible projects that would achieve the target level of capacity improvement, and complete technical and analytical work to ready an application package for entry into the FTA Capital Investment Grant program. Phase 1 will be complete by September 2022. Phase 2 will be complete by March 2024.</p> <p>This request includes \$150,000 for SFCTA staff to perform an enhanced level of project support and technical oversight given the potential benefits to the entire Muni system and to help position projects to apply for a very competitive discretionary federal grant program.</p>

Attachment 2: Brief Project Descriptions ¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Requested	Project Description
38	SFMTA	20 MPH Speed Limit Reductions	\$ 750,000	Every year in San Francisco, about 30 people lose their lives and over 500 more are severely injured while traveling on city streets. Beginning January 2022, the City has increased flexibility to reduce speed limits under Assembly Bill 43 (AB43). Using AB43, SFMTA plans to reduce speed limits from 25 mph to 20mph on key business activity districts. Requested Prop K funds would be used to reduce speed limits on up to 46 business activity districts throughout the city, and support with compliance strategies including education and outreach. Implementation is expected to begin in Summer 2022 and be complete in Fall 2024. A list of 35 potential corridors is included in the attached Allocation Request Form. The remaining 11 corridors will be identified and legislated by the end of 2022.
39	SFMTA	Bike to Work Day 2022	\$ 41,758	Bike to Work Day (BTWD), also called “Bike to Wherever Day” out of respect to the many San Francisco residents currently out-of-work or working from home, is an annual event promoting cycling as a viable commuting option. This year BTWD will be held on May 20, 2022. Prop K funds will cover the sponsorship costs for BTWD through a contract between SFMTA and the San Francisco Bicycle Coalition. This request will fund event promotion and event-day services in all 11 supervisorial districts such as energizer stations with educational materials and activities, as well as SFMTA contract management and oversight.
TOTAL			\$1,941,758	

¹ See Attachment 1 for footnotes.

Attachment 3: Staff Recommendations ¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Recommended	Recommendations
16	SFMTA, SFCTA	Muni Metro Core Capacity Study	\$ 1,150,000	<p>Prop K 5-Year Prioritization Program (5YPP) Amendment: The recommended allocation and appropriation are contingent upon amendment of the Other Transit Enhancements 5YPP. See attached 5YPP amendment for details.</p> <p>Deliverable: Upon substantial completion of Phase 1, SFMTA shall present to the Transportation Authority Board a summary of Study progress to date and a refined approach to Phase 2 activities.</p>
38	SFMTA	20 MPH Speed Limit Reductions	\$ 750,000	<p>5YPP Amendment: The recommended allocation is contingent upon amendment of the Traffic Calming 5YPP. See attached 5YPP amendment for details.</p> <p>Special Condition: Reimbursement for implementation cost for the speed limit signs (\$521,164) is conditioned upon the SFMTA Board approval of the speed limit changes proposed in this project and SFMTA providing the final list of project corridors.</p>
39	SFMTA	Bike to Work Day 2022	\$ 41,758	<p>Special Condition: Funds are conditioned upon the San Francisco Bicycle Coalition locating one or more energizer station(s) per district.</p>
TOTAL			\$ 1,941,758	

¹ See Attachment 1 for footnotes.

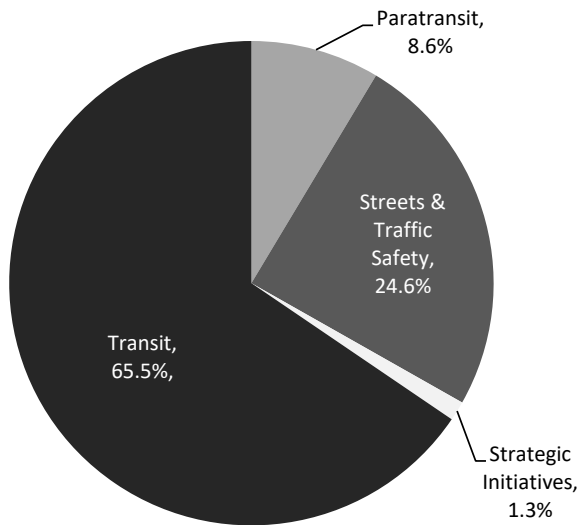
Attachment 4.
Prop K Allocation Summary - FY2021/22

PROP K SALES TAX

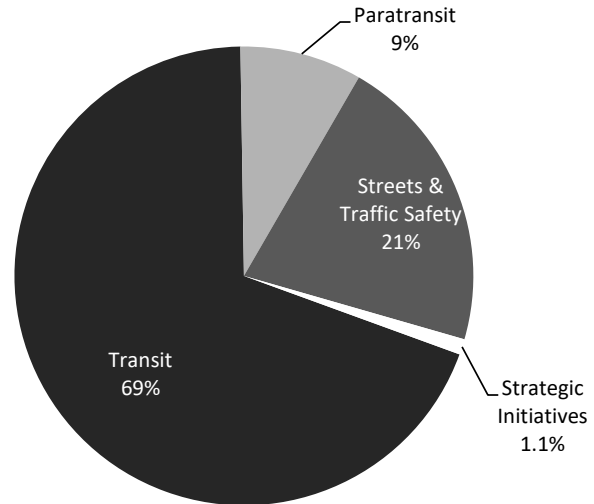
FY2021/22	Total	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	FY 2025/26
Prior Allocations	\$ 49,416,818	\$ 17,036,381	\$ 20,661,684	\$ 8,653,632	\$ 2,181,909	\$ 883,212
Current Request(s)	\$ 1,941,758	\$ 441,758	\$ 655,000	\$ 725,000	\$ 120,000	\$ -
New Total Allocations	\$ 51,358,576	\$ 17,478,139	\$ 21,316,684	\$ 9,378,632	\$ 2,301,909	\$ 883,212

The above table shows maximum annual cash flow for all FY 2021/22 allocations and appropriations approved to date, along with the current recommended allocation(s) and appropriation.

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



Prop K Investments To Date





Memorandum

AGENDA ITEM 8

DATE: February 24, 2022
TO: Transportation Authority Board
FROM: Anna LaForte - Deputy Director for Policy and Programming
SUBJECT: 3/8/2022 Board Meeting: Allocate \$1,791,758 in Prop K Funds, with Conditions, and Appropriate \$150,000 for Three Requests

<p>RECOMMENDATION <input type="checkbox"/> Information <input type="checkbox"/> Action</p> <p>Allocate \$1,791,758 in Prop K funds to the San Francisco Municipal Transportation Agency (SFMTA) for:</p> <ol style="list-style-type: none"> 1. Muni Metro Core Capacity Study (\$1,000,000) 2. 20 MPH Speed Limit Reductions (\$750,000) 3. Bike to Work Day 2022 (\$41,758) <p>Appropriate \$150,000 for:</p> <ol style="list-style-type: none"> 4. Muni Metro Core Capacity Study - Project Support and Technical Oversight <p>SUMMARY</p> <p>Attachment 1 lists the requests, including phase(s) of work and supervisorial district(s). Attachment 2 provides brief descriptions 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 requests, including information on proposed leveraging (e.g. 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 and appropriate \$1,941,758 in Prop K funds. The allocations and appropriation would be subject to the Fiscal Year Cash Flow Distribution Schedules contained in the enclosed Allocation Request Forms.

Attachment 4 shows the Prop K Fiscal Year 2021/22 allocations and appropriations approved 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 Fiscal Year 2021/22 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 CAC unanimously adopted a motion of support for the staff recommendation at its February 23, 2022 meeting.

SUPPLEMENTAL MATERIALS

- Attachment 1 – Summary of Requests
- Attachment 2 – Project Descriptions
- Attachment 3 – Staff Recommendations
- Attachment 4 – Prop K Allocation Summary – FY 2021/22
- Enclosure – Allocation Request Forms (3)



RESOLUTION RELEASING \$1,200,000 OF PROP K FUNDS HELD ON RESERVE FOR THE
GEARY BUS RAPID TRANSIT PHASE 2 CONCEPTUAL ENGINEERING REPORT

WHEREAS, In July 2015 through Resolution 16-06, the Transportation Authority allocated \$6,319,470 in Prop K funds to the San Francisco Municipal Transportation Agency (SFMTA) for the Geary Bus Rapid Transit (BRT) Phase 2 Conceptual Engineering Report (CER) to advance a BRT project on Geary Boulevard between Stanyan Street and 34th Avenue, including a center-running transitway between Arguello Boulevard and 28th Avenue and side-running bus lanes elsewhere; and

WHEREAS, The SFMTA now proposes an amended scope of work for the project, including implementing side-running bus lanes throughout the entire Geary BRT Phase 2 corridor extents from Stanyan Street to 34th Avenue; and

WHEREAS, In December 2021 through Resolution 22-19, the Board approved an amendment of the project scope and reduced the Prop K allocation from \$6,319,470 to \$4,427,317 to reflect a lower level of effort scope of work needed to complete the CER for the side-running project and of this amount, held \$1,200,000 on reserve, to be released by the Board pending agreement between Commissioner Chan's office, Transportation Authority staff, and SFMTA staff on the proposed draft project designs on a block-by-block basis, and review of preliminary assessment of benefits and impacts, cost estimate and funding plan, and draft outreach materials for public outreach round 2; and

WHEREAS, SFMTA staff have developed and provided draft project designs on a block-by-block basis, a preliminary assessment of benefits and impacts, a cost estimate and funding plan, and draft outreach materials for public outreach round 2, and coordinated with Commissioner Chan's office and Transportation Authority staff to reach agreement on the proposed draft project designs, and requested release of the \$1,200,000 in Prop K funds on reserve and Transportation Authority staff recommended releasing the funds on reserve; and

WHEREAS, There are sufficient funds in the Capital Expenditures line item of the Transportation Authority's adopted Fiscal Year 2021/22 budget to cover the proposed actions; now, therefore, be it

RESOLVED, That the Transportation Authority hereby releases \$1,200,000 of Prop K project funds currently on reserve for the SFMTA's Geary BRT Phase 2 CER Project.



Memorandum

AGENDA ITEM 9

DATE: March 17, 2022

TO: Transportation Authority Board

FROM: Anna LaForte - Deputy Director for Policy and Programming

SUBJECT: 03/22/2022 Board Meeting: Release \$1,200,000 of Prop K Funds Held on Reserve for the Geary Bus Rapid Transit Phase 2 Conceptual Engineering Report

RECOMMENDATION ☐ Information ☒ Action

Release \$1,200,000 of Prop K project funds held on reserve for the Geary Bus Rapid Transit (BRT) Phase 2 Conceptual Engineering Report (CER).

SUMMARY

In July 2015 through Resolution 16-06, the Transportation Authority allocated \$6,319,470 in Prop K funds to the San Francisco Municipal Transportation Agency (SFMTA) for the Geary BRT Phase 2 CER. Geary BRT Phase 2 covers Geary Boulevard between Stanyan Street and 34th Avenue and was originally designed with a center-running transitway between Arguello Boulevard and 28th Avenue. The SFMTA now recommends side-running transit lanes throughout the project limits. In December 2021 through Resolution 22-18, the Transportation Authority approved an amendment of the project scope and reduced the grant amount to \$4,427,317 to reflect a lower level of effort scope of work needed to complete the CER for the side-running project. Of this amount, the Board held \$1,200,000 on reserve, to be released by the Board pending agreement between Commissioner Chan's office, Transportation Authority staff, and SFMTA staff on the proposed draft project designs on a block-by-block basis (Attachment 1), review of cost estimate (Attachment 2) and funding plan, preliminary assessment of benefits and impacts (Attachment 4), and draft materials for public outreach round 2. We recommend release of the funds since the SFMTA has provided the requested materials and reached agreement with Commissioner Chan's office and Transportation Authority staff on the draft block-by-block project designs in preparation for outreach round 2 which began in early March. SFMTA staff will provide a project update at the March 22 Board meeting.

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



BACKGROUND

The Geary BRT Project is a significant transit and safety project. Its two main goals are to improve transit speed and reliability for the more than 56,000 daily riders (pre-COVID) of the 38 Geary lines and to improve pedestrian safety along Geary Boulevard, part of San Francisco's Vision Zero High Injury Network. The project is being designed and delivered in two phases.

Phase 1 of Geary BRT, located on Geary and O'Farrell between Stanyan and Market streets, includes side-running bus lanes and is called the Geary Rapid Project. SFMTA completed the first set of transit and safety treatments for the Geary Rapid Project in 2018. Major upgrades and coordinated utility work began in early 2019 and continued through 2021. Construction on the Geary Rapid Project is now substantially complete, was completed on time and on budget and has had minimal construction impacts to adjacent residences and businesses.

Phase 2 of Geary BRT, located on Geary Boulevard between Stanyan Street and 34th Avenue, is called the Geary Boulevard Improvement Project. The Locally Preferred Alternative (LPA) selected during the Geary BRT environmental process included a center-running transitway on Geary Boulevard between Arguello Boulevard and 28th Avenue and side-running bus lanes elsewhere on the corridor. SFMTA now recommends pursuing side-running transit lanes throughout the entirety of the Geary BRT project limits, including in the Phase 2 section originally planned for the center-running transitway. The new proposal is similar in scope and project definition to the Alternative 2 (side-lane bus rapid transit) project alternative documented in the Geary BRT Environmental Impact Report (EIR) and Environmental Impact Statement (EIS).

While Phase 2 of Geary BRT has not yet been implemented, SFMTA installed Temporary Emergency Transit Lanes (TETLs) along segments of Geary Boulevard in winter 2020-21. The lanes are located in the eastbound direction from 33rd to 28th avenues, 27th to 24th avenues and 16th Avenue to Stanyan Street and in the westbound direction from Stanyan Street to 15th Avenue, 24th to 25th avenues and 27th to 32nd avenues. These temporary transit lanes proved effective and popular and were made permanent by the SFMTA Board of Directors on July 20, 2021.

DISCUSSION

As noted above, the SFMTA is requesting and we are recommending release of the \$1,200,000 in Prop K funds held on reserve for Geary BRT Phase 2 since all the conditions on the release of the funds have been met. SFMTA staff have provided materials and coordinated with the District 1 Supervisor's office and Transportation Authority staff in advance of commencing outreach round 2. A discussion of the draft project design drawings (Attachment 1), project cost estimate (Attachment 2) and funding plan (Attachment 3), outreach round 2, and preliminary benefits and impacts (Attachment 4) is provided below.



Draft project designs on a block-by-block basis. Proposed block-by-block project designs show existing conditions and the current SFMTA project proposal for Geary Boulevard between 34th Avenue and Stanyan Street. Like EIR Alternative 2, the current project proposal includes side running bus lanes between approximately 33rd Avenue and Stanyan Street. A few of the notable changes in the current project proposal relative to EIR Alternative 2 include the following:

- Western extent of the bus lanes is now at 32nd Avenue westbound and 33rd Avenue eastbound instead of 34th Avenue in EIR Alternative 2.
- The current project proposal retains the 38R Geary Rapid bus stops at 20th Avenue and removes the local bus stops at 12th Avenue.
- The current proposal would optimize the location of 11 bus stops so they are on the far side of the intersection and ensure all bus stop lengths meet current standards.
- The current proposal includes eight right-turn pockets to improve transit reliability by reducing right-turn conflicts.
- The current project proposal would result in a lower net loss of parking than the EIR LPA, which would remove approximately 60 spaces, and the EIR Alternative 2, which would remove 140 spaces. The current project proposal would remove approximately 80 parking spaces along Geary Boulevard but SFMTA also proposes adding 30 parking spaces on side streets by converting parallel parking to angled parking, which would result in a net reduction of 50 parking spaces. The current proposal also includes an updated color curb plan based on merchant loading data and extended meter hours to improve parking availability.
- The current project proposal would remove eastbound or westbound left turns at ten intersections. Intersections that currently allow left turns in both directions would offer a single eastbound or westbound left turn.
- The current project proposal adds expanded pedestrian median refuges at 24 intersections. EIR Alternative 2 did not propose any new median refuges.
- The number and location of pedestrian bulbouts has changed from the EIR Alternative 2. The total count of pedestrian bulbs has decreased from 33 in EIR Alternative 2 to 23 in the current SFMTA proposal. SFMTA staff analyzed ten years of historic collision data and has proposed pedestrian bulbs at all intersections with documented crash history during that period. SFMTA has identified an additional 19 locations without crash records over the past ten years where pedestrian bulbs could be added to the corridor, subject to funding availability, without significant impacts to parking.

Cost estimate and funding plan. Attachment 2 includes the SFMTA's draft project cost estimate and Attachment 3 includes the draft funding plan as it was included in the Allocation



Request Form for the Geary BRT Phase 2 CER (Geary Boulevard Improvement Project) [Amendment] approved in December 2021. SFMTA currently estimates a total project cost of \$48.9 million. The Transportation Authority has programmed \$10 million in Prop K funds to the project that would potentially leverage Prop A General Obligation bond funds, General Funds, and other potential state and federal grants such as Transit and Intercity Rail Capital Program, One Bay Area Grant (Cycle 3), Low Carbon Transit Operations Program, and Affordable Housing Sustainable Communities.

Review of preliminary assessment of benefits and impacts. The Geary BRT EIR included traffic and transit travel time analysis for baseline and project conditions in year 2020 and 2035. SFMTA staff have prepared preliminary analysis of the potential transit travel time benefits of Geary BRT Phase 2 relative to current post-TETL conditions. SFMTA estimates that the proposed project could reduce PM peak period travel times on Geary buses by about two-and-a-half minutes between 34th Avenue and Stanyan Street (average of eastbound and westbound 38 and 38R services) when compared with current conditions. These travel time savings would be realized in addition to early travel benefits related to the now-permanent TETLs. Compared to current conditions the EIR LPA could save approximately three minutes of travel time and EIR Alternative 2 would save about one minute and forty seconds. This means that the proposed project could perform better than EIR Alternative 2 and deliver more than 80% of the travel time savings of the EIR LPA. Attachment 5 contains a summary of current transit travel times after the implementation of the TETLs, estimated travel time benefits of the current project proposal, and an inventory of project definition changes relative to EIR Alternative 2.

Draft outreach round 2 materials. SFMTA staff shared draft outreach materials for outreach round 2 with Supervisor Chan's office and Transportation Authority staff. The outreach materials include mailers, posters, newspaper advertisements, surveys, boards for public events, and website content. The materials are available in English, Chinese, and Russian. Outreach activities are currently underway and include a pop-up event on Geary Boulevard, an unstaffed information display and in-person survey opportunity, virtual office hours, outreach to community groups, and individual responses to email and hotline inquiries.

FINANCIAL IMPACT

The recommended action would release \$1.2 million in Prop K funds held in reserve that were previously allocated in July 2015. Sufficient funds are included in the Fiscal Year 2021/22 annual budget to cover the recommended action. Furthermore, sufficient funds will be included in future budgets to cover the cash flow distributions as approved in December 2021 through Resolution 22-18, for those respective fiscal years.



CAC POSITION

The CAC will consider this item at its March 23, 2022 meeting before the Board considers final approval on April 12, 2022.

SUPPLEMENTAL MATERIALS

- Attachment 1 - Draft project drawings
- Attachment 2 - SFMTA project cost estimate
- Attachment 3- Allocation Request Form for the Geary BRT Phase 2 CER (Geary Boulevard Improvement Project) [Amendment] approved December 2021
- Attachment 4 - Preliminary benefits and impacts



Project Timeline



Share your feedback about proposed transit and safety improvements

Welcome! Goals of this open house:

The Geary Boulevard Improvement Project is the second phase of improvements on Geary Boulevard, proposed between 34th Avenue and Stanyan Street to improve Muni's 38 Geary bus service and address traffic safety.

In fall 2021 we asked neighbors about their priorities for Geary. Thanks to input from over 600 community members, the SFMTA has used this feedback to draft the detailed project design. Now we'd like to hear what you think about the details. Review these project materials and take a short survey to let us know what you think about these proposed changes.

We'll use your input to help create the final project proposal, to be considered for approval later in 2022 by the SFMTA Board of Directors.

Overview of project proposals:

- Installing transit lanes between 28th and 15th avenues. To make room, angled parking would be converted to parallel parking.
- Relocating 11 bus stops and removing two closely-spaced stops to improve transit performance.
- Traffic signal upgrades, new bus bulb-outs and lengthening bus zones that are too short to accommodate two buses.
- Safety improvements, including pedestrian bulb-outs, daylighting, expanded median refuges and left-turn restrictions at key intersections.

To offset the loss of about two parking spaces per block face on average, we're proposing to increase parking spaces on side streets and make curb space changes to accommodate merchant needs, including evening and Sunday metering in Central Richmond.

Geary Boulevard Improvement Project



Legend

- **38 Geary bus stop: no changes**
38Geary公車站: 沒有變動
Остановка автобуса № 38 Geary: без изменений 38R
- **38R Geary Rapid bus stop: no changes**
38RGeary快車公車站: 沒有變動
Остановка автобуса № 38R Geary Rapid: без изменений
- ⊗ **Bus stop proposed for removal**
擬取消公車站
Автобусная остановка, которую предлагается удалить
- ⊗● **Proposed 38 Geary bus stop relocation**
擬遷移 38 Geary 公車站
Предлагаемый перенос остановки для автобусов 38 Geary
- ⊗● **Proposed 38R Geary Rapid bus stop relocation**
擬遷移 38R Geary Rapid 公車站
Предлагаемый перенос остановки для автобусов 38R Geary Rapid

Bus Stop Changes 調整巴士站

Изменения Касательно Автобусных Остановок

Some changes to bus stops on Geary Boulevard are being proposed to improve the speed, reliability and convenience of your trip on the 38 Geary and 38R Geary Rapid.

A majority of respondents who completed the fall 2021 survey said they support all of the proposed bus stop changes. The SFMTA is recommending to maintain most of the original proposals. However, the bus stop relocation at 25th Avenue outbound has been dropped based on feedback from neighboring stakeholders.

Proposed changes:

- Moving bus stops from the nearside of intersections to the far side, so buses don't get stopped at red lights as often
- Removing closely-spaced stops at 12th Ave to improve travel time reliability
- Adding bus bulb-outs to the Park Presidio stops. Would require turn restrictions from Geary onto Funston and 14th avenues (learn more at [SFMTA.com/ParkPresidioSurvey](https://www.sfmta.com/ParkPresidioSurvey))



[SFMTA.com/ImproveGeary](https://www.sfmta.com/ImproveGeary)

Geary Boulevard Improvement Project Proposals

Geary 街 交通改善工程提案 / Предложения в рамках проекта модернизации Geary

- Existing side-running transit lanes / 現有側邊行駛公交車道 / Существующие боковые полосы для движения общественного транспорта
- New side-running transit lanes / 新的側邊行駛公車專用道 / Новые боковые полосы для движения общественного транспорта
- New bus bulb-out (sidewalk extension at bus stop) / 在公車站增設人行道拓寬 / Новое расширение тротуара на автобусных остановках
- ◆ New pedestrian bulb-out (sidewalk extension at intersection) / 在十字路口增設人行道拓寬 / Новое расширение тротуара на перекрестке (для пешеходов)
- ↗ New turn restriction from Geary / Geary 街 新設轉彎限制 / Новое ограничение поворота (движение от Geary)
- ↖ Existing left-turn okay from Geary / 許可 Geary 街 現有的左轉 / Существующий поворот налево (движение от Geary одобрен)

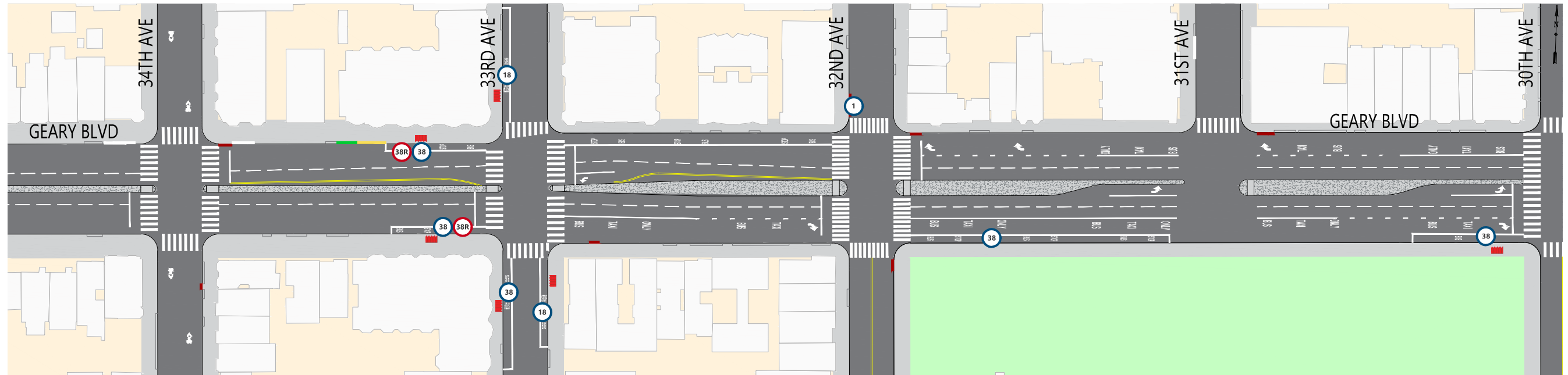


Proposed Transit and Safety Improvements

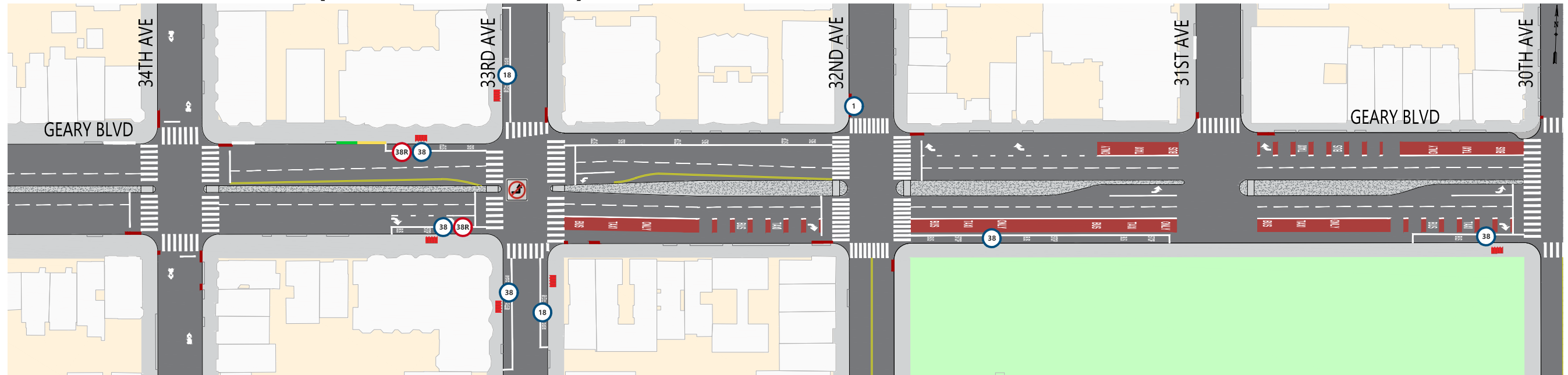
The diagram above illustrates proposed changes, including new transit lanes, pedestrian bulb-outs (sidewalk extensions at intersection corners) and left-turn restrictions to improve safety. All project intersections would receive standard treatments such as daylighting, expanded median refuges and longer pedestrian walk times. To improve parking availability along the merchant corridor in Central Richmond, the meter hours on Geary Boulevard (14th to 28th avenues) are proposed to be extended to 10:00 p.m. and also include Sundays from noon to 6:00 p.m.

Construction would be coordinated with utility upgrades, as many sewer and water pipes under Geary are over 100 years old.

EXISTING CONDITIONS



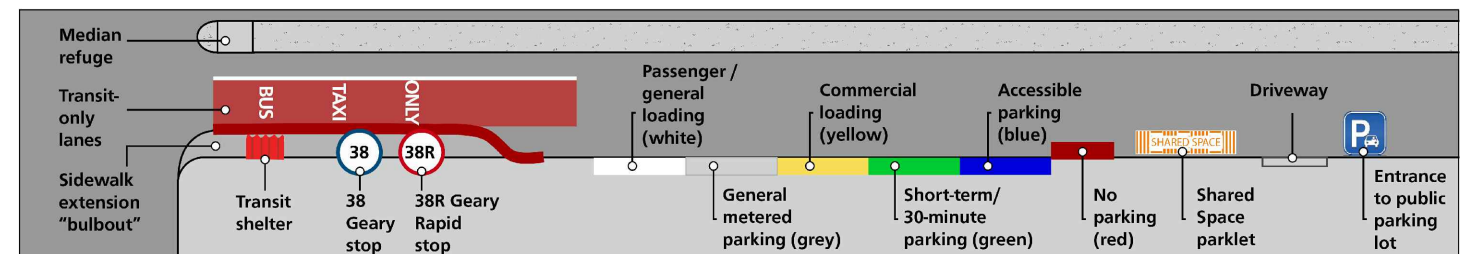
PROJECT PROPOSALS (Outreach Round 2)



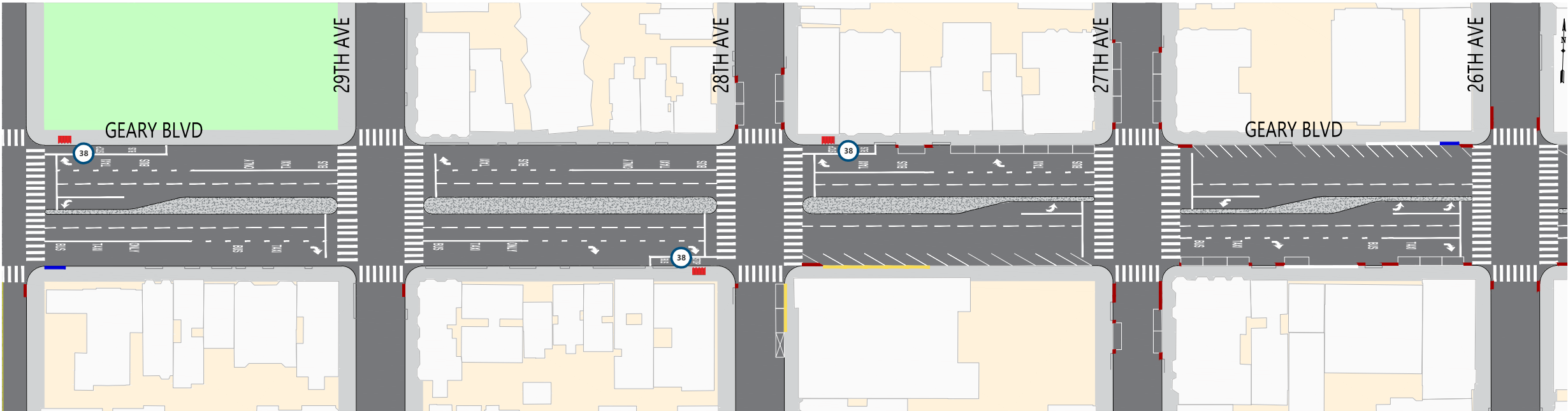
SUMMARY OF PROPOSALS

- Dedicated red transit-only lanes east of 33rd Ave
- Pedestrian bulbouts at the corners of 30th Ave
- Restriction of the left-turn from eastbound Geary onto 33rd Ave
- Traffic safety treatments including daylighting and leading pedestrian signals

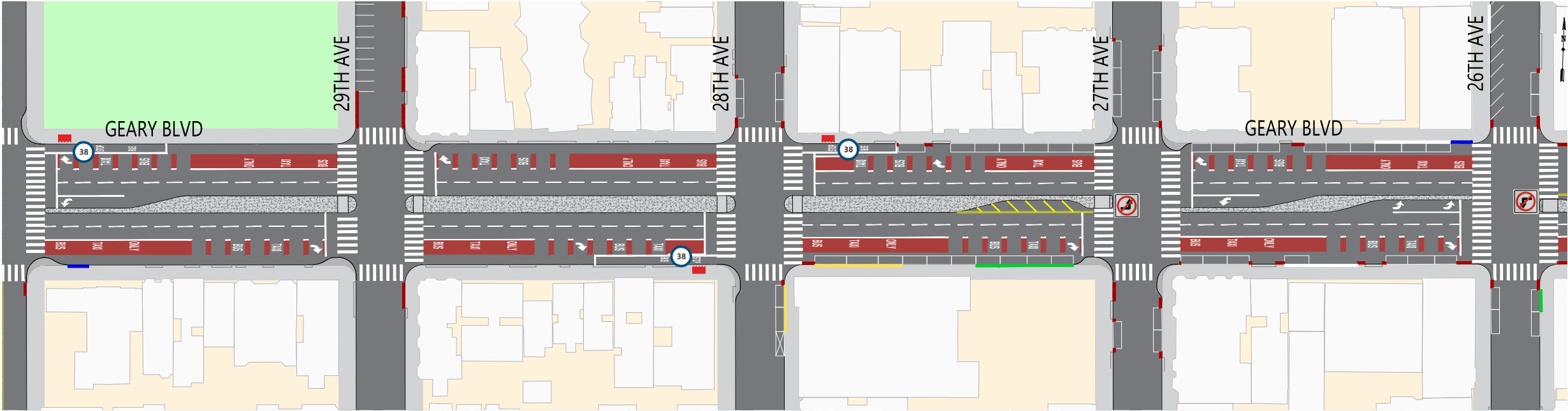
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EXISTING CONDITIONS



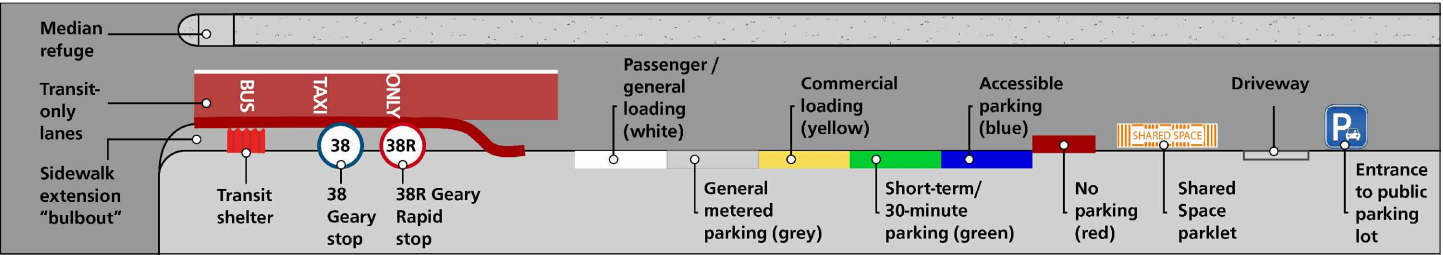
PROJECT PROPOSALS (Outreach Round 2)



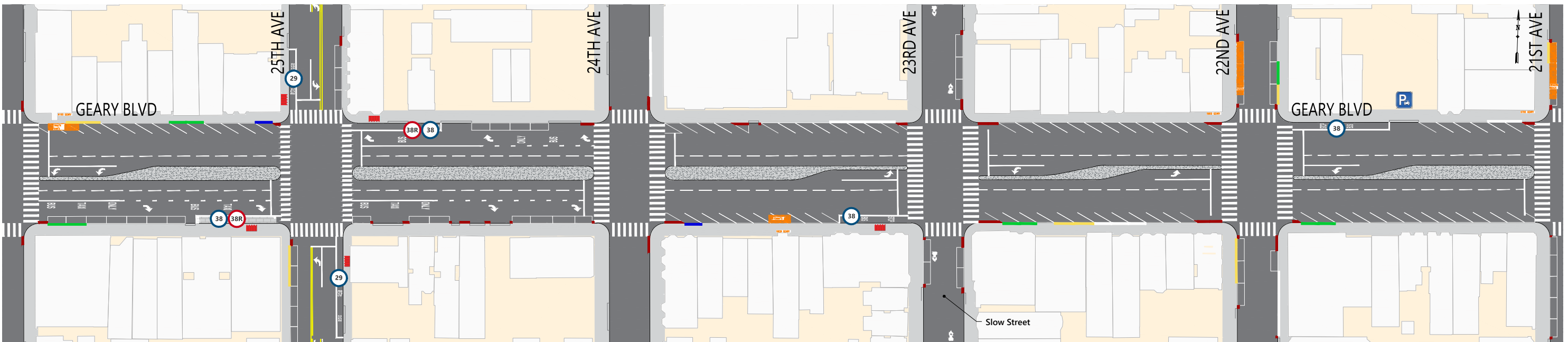
SUMMARY OF PROPOSALS

- New dedicated red transit-only lanes
 - Extension of the 28th Ave local bus zones
 - Pedestrian bulbouts at the corners of 30th, 29th, 28th and 27th avenues
 - Restriction of the left-turns from eastbound Geary onto 27th Ave and westbound Geary onto 26th Ave
 - Updated parking and loading regulations east of 28th Ave based on merchant and survey feedback*
 - New angled parking on 29th and 26th avenues, north of Geary
 - Traffic safety treatments including expanded median refuges, day lighting and leading pedestrian signals
- *proposal includes extended parking meter hours on Geary to add evenings (6-10pm) and Sundays (noon-6pm), without parking time-limits in the new time bands

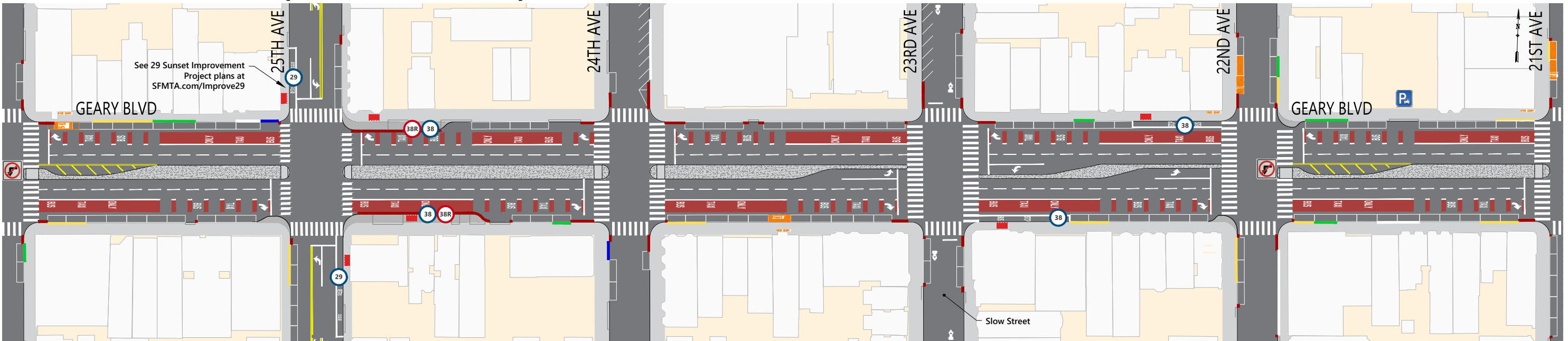
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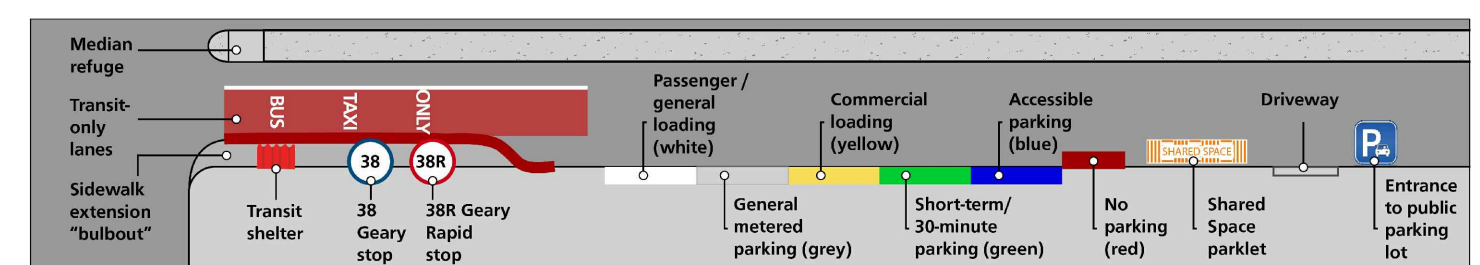
PROJECT PROPOSALS (Outreach Round 2)



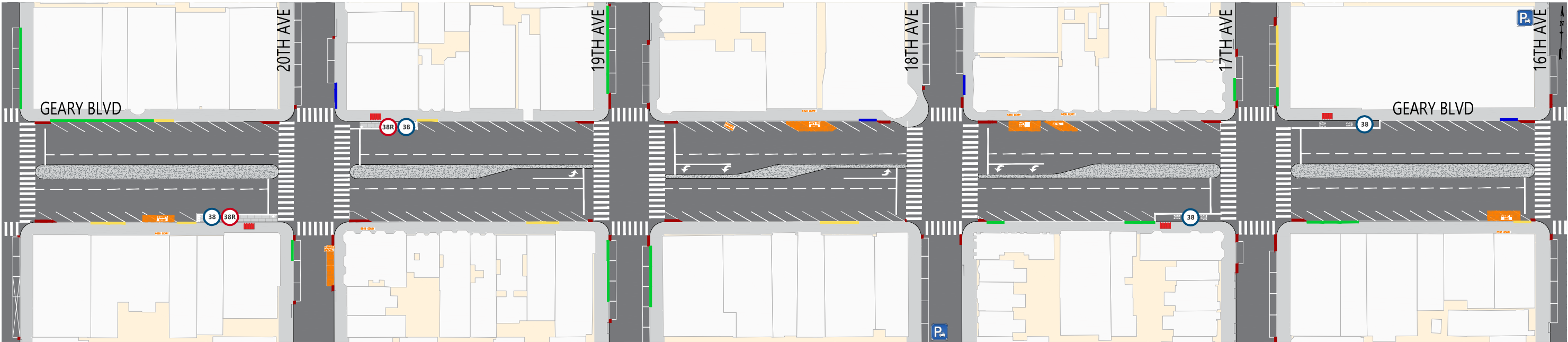
SUMMARY OF PROPOSALS

- New dedicated red transit-only lanes
 - Relocation of the inbound 25th Ave Rapid stop across the street, with new widened sidewalks
 - Relocation of the 22nd/23rd Ave local stops across the street
 - Pedestrian bulbouts at the corners of 25th and 22nd avenues
 - Restriction of the left-turns from westbound Geary onto 26th and 22nd avenues
 - Updated parking and loading regulations based on merchant and survey feedback*
 - New angled parking on 24th and 23rd avenues, north of Geary
 - Traffic safety treatments including expanded median refuges, daylighting and leading pedestrian signals
- *proposal includes extended parking meter hours on Geary to add evenings (6-10pm) and Sundays (noon-6pm), without parking time-limits in the new time bands

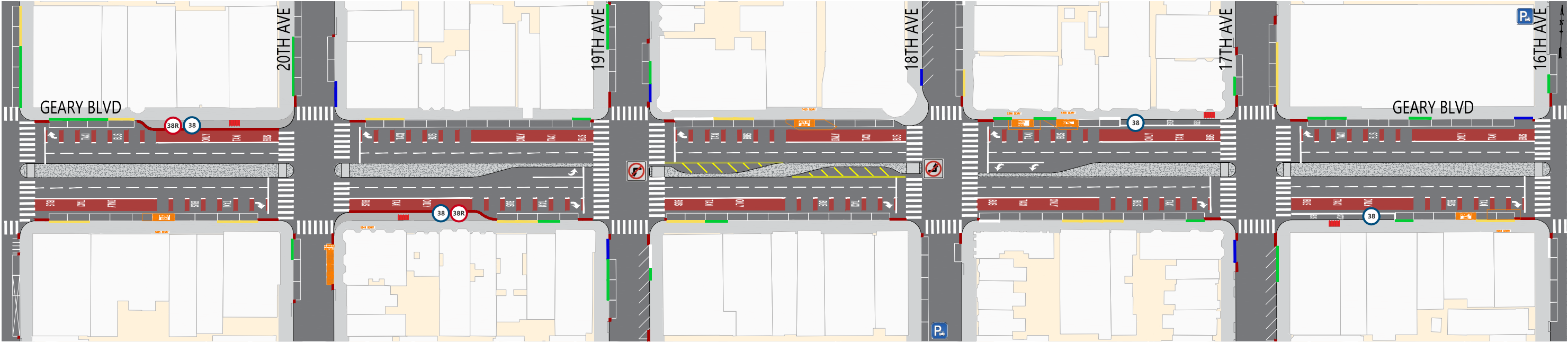
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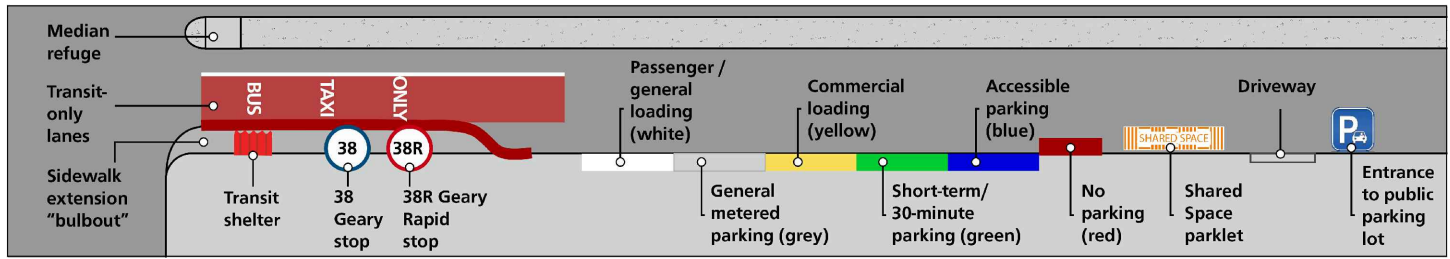
PROJECT PROPOSALS (Outreach Round 2)



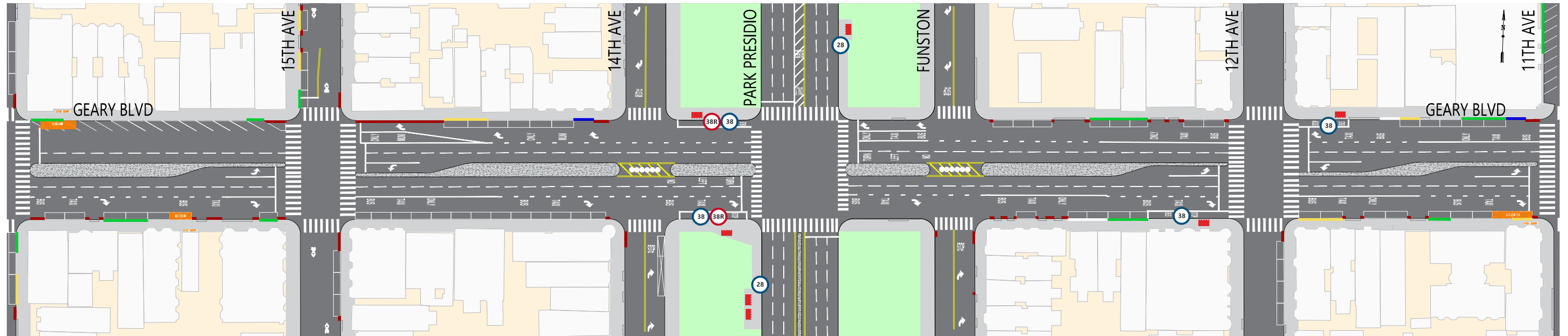
SUMMARY OF PROPOSALS

- New dedicated red transit-only lanes
 - Relocation of the 20th Ave Rapid stops across the street, with new widened sidewalks
 - Relocation of the 17th Ave local stops across the street
 - Restriction of the left-turns from westbound Geary onto 19th Ave and eastbound Geary onto 18th Ave
 - Updated parking and loading regulations based on merchant and survey feedback*
 - New angled parking on 19th and 17th avenues, south of Geary, and on 18th Ave, north of Geary
 - Traffic safety treatments including expanded median refuges, day lighting and leading pedestrian signals
- *proposal includes extended parking meter hours on Geary to add evenings (6-10pm) and Sundays (noon-6pm), without parking time-limits in the new time bands

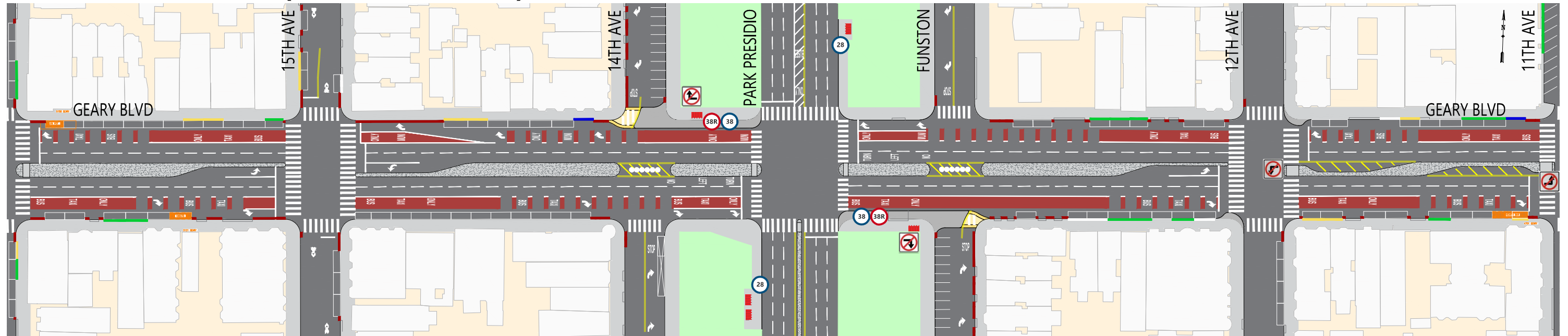
LEGEND



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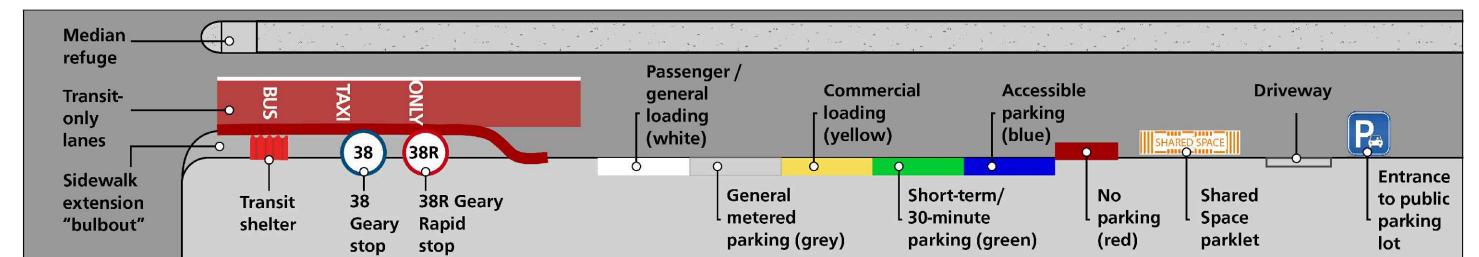
PROJECT PROPOSALS (Outreach Round 2)



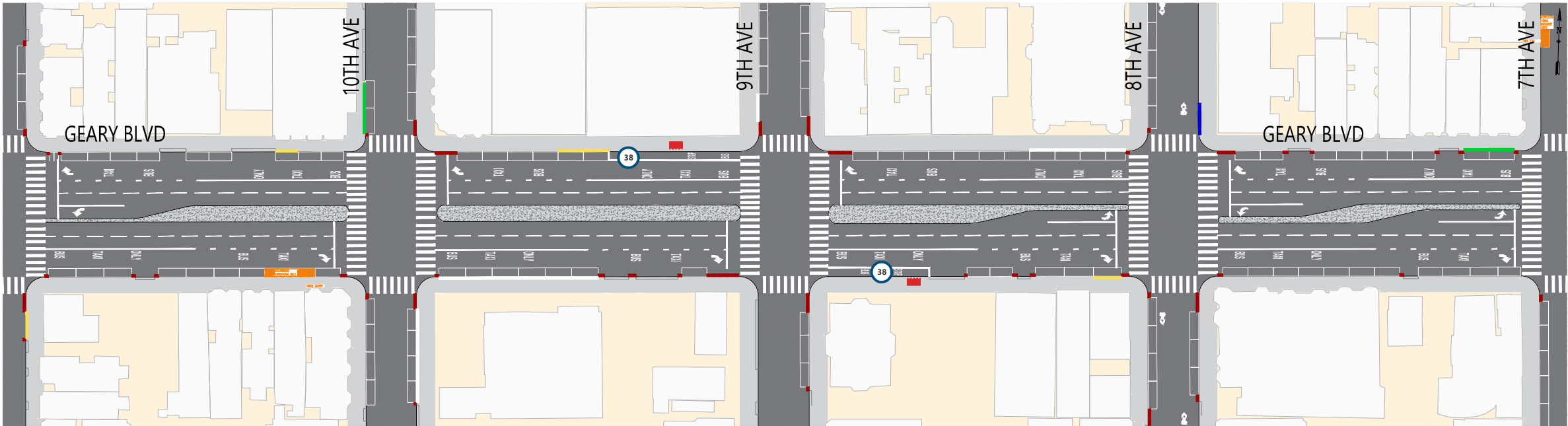
SUMMARY OF PROPOSALS

- New dedicated red transit-only lanes
 - Relocation of the inbound Park Presidio Rapid stop across the street
 - Sidewalk extensions at Park Presidio northwest and southeast corners that restrict right-turns from Geary onto 14th Ave northbound and Funston Ave southbound
 - Removal of the 12th Ave local stops
 - Pedestrian bulbouts at the corners of 12th and 11th avenues
 - Restriction of the left-turns from westbound Geary onto 12th Ave and eastbound Geary onto 11th Ave
 - Updated parking and loading regulations based on merchant and survey feedback*
 - New angled parking on 14th Ave, north of Geary, and Funston Ave, south of Geary
 - Traffic safety treatments including expanded median refuges, day lighting and leading pedestrian signals
- *proposal includes extended parking meter hours on Geary to add evenings (6-10pm) and Sundays (noon-6pm), without parking time-limits in the new time bands*

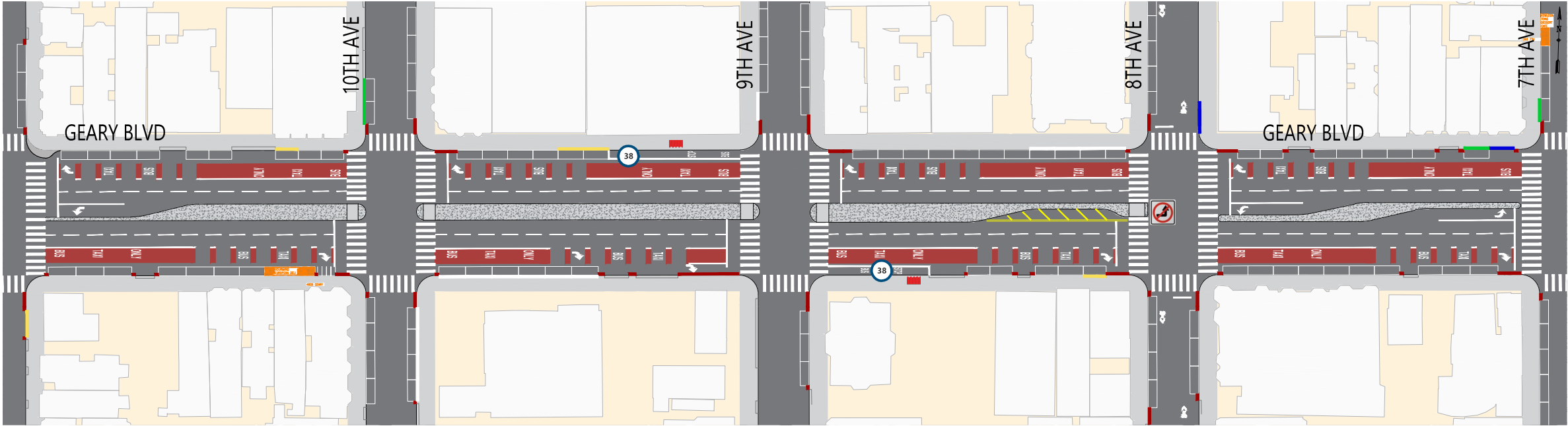
LEGEND



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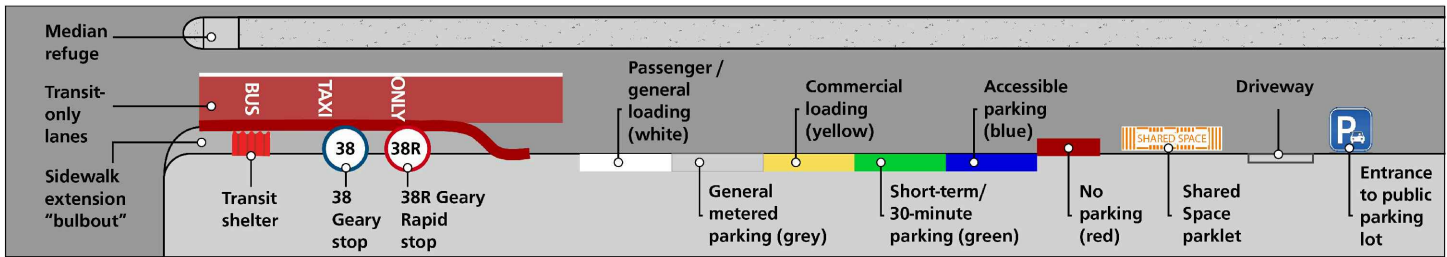
PROJECT PROPOSALS (Outreach Round 2)



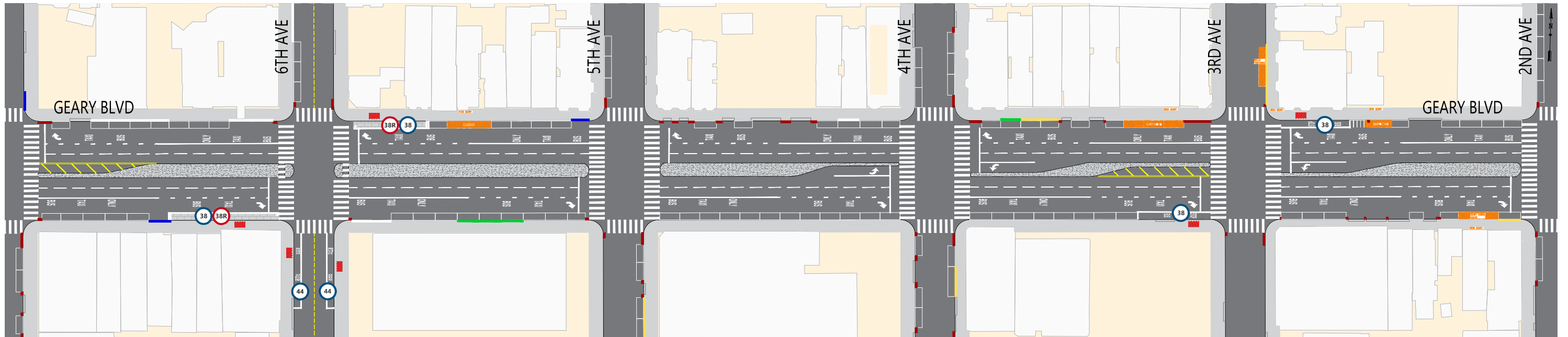
SUMMARY OF PROPOSALS

- Dedicated red transit-only lanes
- Pedestrian bulbout at the corner of 11th Ave
- Restriction of the left-turn from eastbound Geary onto 8th Ave
- Traffic safety treatments including expanded median refuges, daylighting and leading pedestrian signals

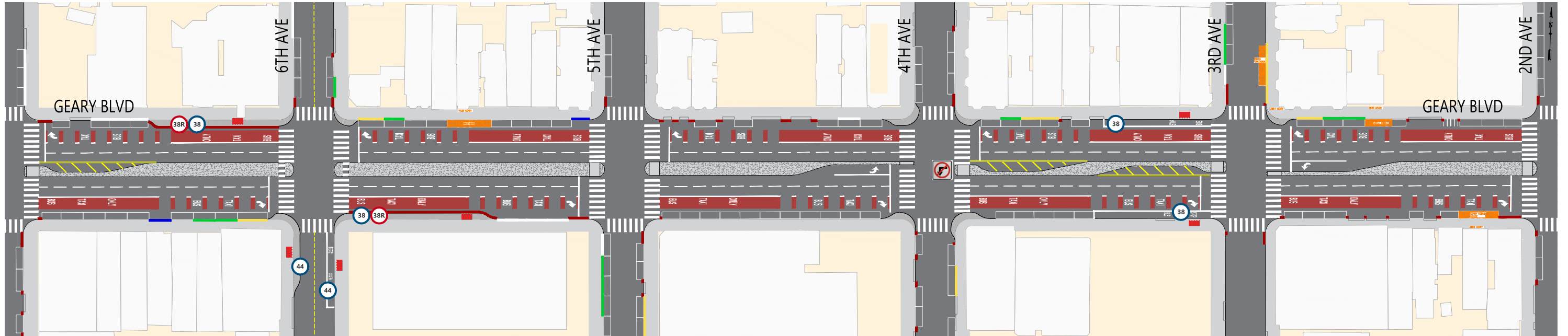
LEGEND



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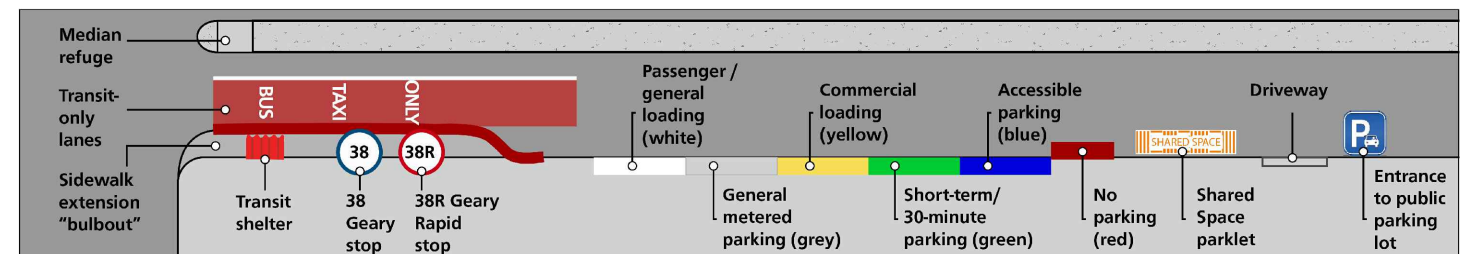
PROJECT PROPOSALS (Outreach Round 2)



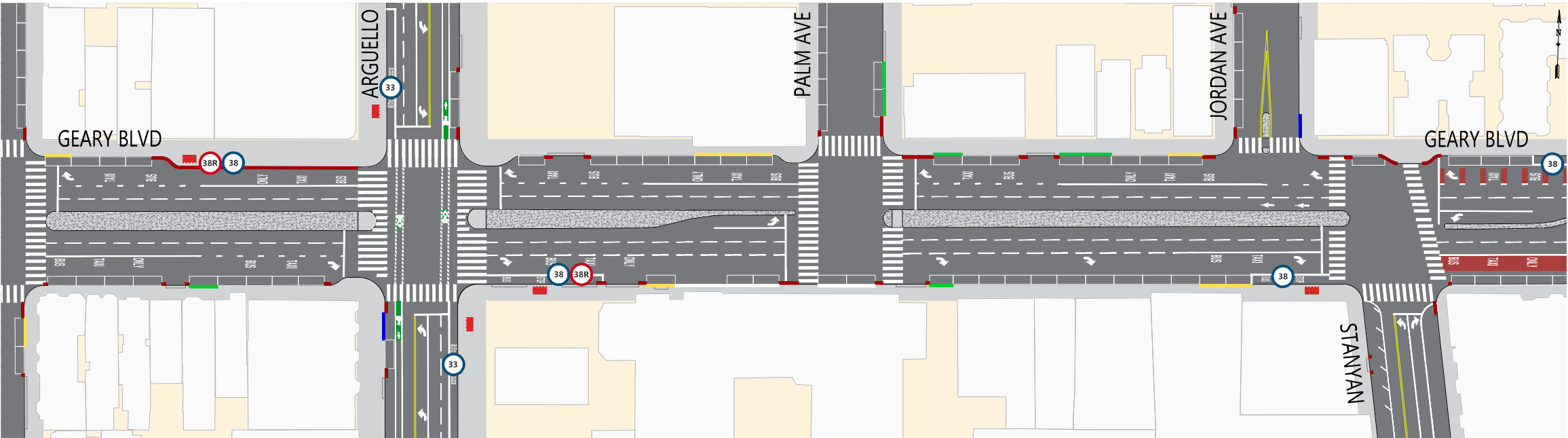
SUMMARY OF PROPOSALS

- Dedicated red transit-only lanes
- Relocation of the 6th Ave Rapid stops across the street, with new widened sidewalks
- Relocation of the outbound 3rd Ave local stop across the street
- Pedestrian bulbouts at the corners of 6th, 4th and 3rd avenues
- Restriction of the left-turn from westbound Geary onto 4th Ave
- Traffic safety treatments including expanded median refuges, daylighting and leading pedestrian signals

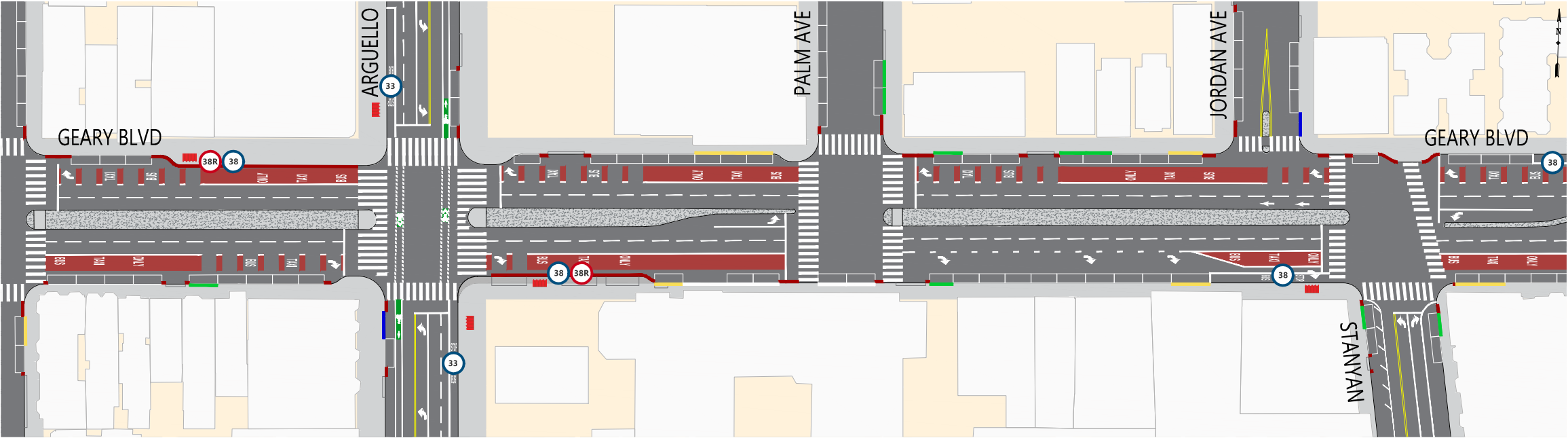
LEGEND



EXISTING CONDITIONS



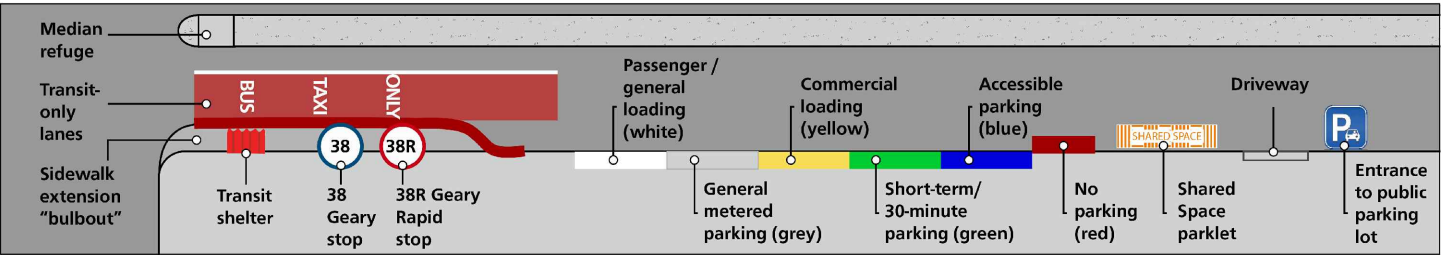
PROJECT PROPOSALS (Outreach Round 2)



SUMMARY OF PROPOSALS

- Dedicated red transit-only lanes
- Extension of the inbound Arguello Rapid stop, with new widened sidewalks
- Updated parking and loading regulations at Stanyan Street
- Traffic safety treatments including expanded median refuges, day lighting and leading pedestrian signals

LEGEND



Item	Description	Quantity	Unit	Unit Price	Extension
DPW Design and Construction					
Transit and Pedestrian Bulbs					
1.a	New 130-foot Transit Bulb (Sidewalk Extension)	5	EA	\$ 330,000	\$ 1,650,000
1.b	New 120-foot Transit Bulb with Raised Crosswalk	2	EA	\$ 390,000	\$ 780,000
2	Extend Transit Bulb		EA	\$ 170,000	\$ -
3	New Transit Island		EA	\$ 110,000	\$ -
4	New 100' Concrete Bus Pad		EA	\$ 60,000	\$ -
5.a	New Single Pedestrian Bulb (specific locations pending updated analysis)	32	EA	\$ 90,000	\$ 2,880,000
5.b	New Dual Pedestrian Bulb		EA	\$ 110,000	\$ -
5.c	New Mid-Block 20-foot Pedestrian Bulb		EA	\$ 100,000	\$ -
5.d	Median Thumbnail Upgrade	30	EA	\$ 30,000	\$ 900,000
5.e	Curb Ramp Upgrades to ADA Standards	14	EA	\$ 60,000	\$ 840,000
6	Miscellaneous Concrete Improvements		LS	\$ -	\$ -
7	Remove Transit Bulb		EA	\$ 170,000	\$ -
8	Remove Pedestrian Bulb		EA	\$ 60,000	\$ -
Traffic Signals					
9	New Traffic Signal		EA	\$ 400,000	\$ -
10	Signal Upgrade	12	EA	\$ 450,000	\$ 5,400,000
11	Signal Modification (add mast arms)	1	EA	\$ 100,000	\$ 100,000
12	Fiber Optic Conduits and Cables (Stanyan-25th Ave)	1	LS	\$ 2,500,000	\$ 2,500,000
Streetscaping					
13	Streetscaping on Transit Bulbs	7	EA	\$ 20,000	\$ 140,000
MTA Design and Installation		\$ 15,190,000			
Transit Stop Improvements					
14	Stop Change	13	EA	\$ 5,000	\$ 70,000
15	Miscellaneous Work (benches, bike racks, trenching for shelter power, etc)	1	LS	\$ 100,000	\$ 100,000
Traffic Improvements					
16	Transit-Only Lane (red)	182,600	SQ FT	\$ 25	\$ 4,570,000
17	Remove Red Transit-Only Lane		SQ FT	\$ 5	\$ -
18	Parking Configuration Changes	13	BLK	\$ 15,000	\$ 200,000
19	Turn Pocket or Turn Restriction		EA	\$ 5,000	\$ -
20	OCS Modifications		LS	\$ -	\$ -
Bike and Pedestrian Improvements					
21	Bike Lane		BLK	\$ 100,000	\$ -
22	Daylighting & LPI/Signal Timing	35	INT	\$ 5,000	\$ 180,000
Soft Costs		\$ 20,310,000			
PLN	Environmental Review				\$ -
PE	MTA: Outreach (Labor and Collateral) and Conceptual Design	8%	of all hard costs		\$ 1,630,000
PE	PW: Notice of Intent (NOI) and Control Drawings	2%	of PW hard costs		\$ 310,000
DD	MTA: Design Support and Review	10%	of all hard costs		\$ 2,040,000
DD	PW: Detailed Design (100% PS&E Package) and Advertisement	16%	of PW hard costs		\$ 2,440,000
DD	Fees: City Attorney Office, Sidewalk Legislation, General Plan Referral	35	intersections	\$ 5,000	\$ 175,000
CON	MTA: Engineering Support	3%	of all hard costs		\$ 610,000
CON	PW: Engineering Support and Administration	20%	of PW hard costs		\$ 3,040,000
CON	Construction Mitigation Program	0.7%	of total project budget		\$ 340,000
CON	Art Enrichment Allowance		LS	2% of hard	\$ 310,000
CON	MTA: Transit Support		LS	\$ 100,000	\$ 100,000
		TOTAL COST			\$ 31,310,000
Transit Cost Estimate: \$18,100,000		Contingency (35%)			\$ 10,960,000
Pedestrian Safety Cost Estimate: \$11,560,000		Subtotal			\$ 42,270,000
Signals + Fiber Cost Estimate: \$19,270,000		Inflation (5% /year for 3 years)*			\$ 6,660,000
Total Project Cost: \$48,930,000		MUNI FORWARD ESTIMATE			\$ 48,930,000

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2021/22
Project Name:	Geary BRT Phase 2 CER (Geary Boulevard Improvement Project) [Amendment]
Grant Recipient:	San Francisco Municipal Transportation Agency

EXPENDITURE PLAN INFORMATION

PROP K Expenditure Plans	Rapid Bus Network
Current PROP K Request:	\$4,427,317
Supervisory Districts	District 01, District 02

REQUEST

Brief Project Description

Implement transit and safety improvements to reduce travel time and improve reliability for the 38 Geary lines from Stanyan to 34th Avenue. Improvements would include new side-running transit-only lanes and enhancements to existing transit lanes, transit bulbs and pedestrian safety improvements, updated transit signal priority, and optimized transit stop placements.

Detailed Scope, Project Benefits and Community Outreach

See attached word document

Project Location

Geary Boulevard between Stanyan Street and 34th Avenue

Project Phase(s)

Design Engineering (PS&E)

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:	\$4,427,317

Geary BRT Phase 2 (Geary Boulevard Improvement Project)

Conceptual Engineering Report Phase Scope of Work - Amendment

10/21/2021

Background

The Geary Bus Rapid Transit Project is a major transit and safety project. It's two main goals are to:

- Improve transit speed and reliability for the >56,000 daily riders (pre-COVID) of the 38 Geary lines
- Improve pedestrian safety along Geary Boulevard, part of San Francisco's Vision Zero Network and a street where people walking are eight times more likely to be seriously injured by a collision with a vehicle

The project is a partnership between the SFCTA and the SFMTA. It completed environmental clearance in 2018 and is being designed and delivered in two phases as shown in Figure 1 below. The second phase is called the Geary Boulevard Improvement Project and is the subject of this funding request. The project boundaries are on Geary Boulevard between Stanyan Street and 34th Avenue.

Updated Scope for New Side-Running Design

Evaluation results of side-running transit lanes along Geary Boulevard (Geary BRT Phase 1 and Geary Temporary Emergency Transit Lanes) have indicated positive and cost-effective transit travel time and reliability improvements, with minimal impacts to vehicle traffic. In addition, Geary BRT Phase 1 (the Geary Rapid Project) is poised to be complete on time on budget in September 2021 and has had minimal construction impacts to adjacent residences and businesses. As a result, the SFMTA is now recommending pursuing side-running transit lanes throughout the entirety of the Geary Bus Rapid Transit Project limits, including in the Phase 2 limits (Stanyan to 34th Avenue). This would include side-running transit lanes along Geary Boulevard between Arguello and 28th Avenue that was envisioned as a center-running transitway in the Locally Preferred Alternative selected at the conclusion of the environmental process.

Based on this change in direction, the SFMTA is requesting that the Scope of Work for the CER Phase of Geary BRT Phase 2 (SFCTA Resolution 16-06, Project Number 101-907053) be updated to reflect a scope of work that is a lower level of effort needed to complete the CER Phase of the side-running project. The amended scope includes the same main activities, but at a reduced level of effort due to a less complex design. In addition, the scope includes additional work needed to complete updated environmental project approvals to reflect the new updated side-running design. Reflecting the lower level of effort, SFMTA proposes to deobligate \$1,892,153 of the original \$6,319,470 allocated.

1. CER Design Package

The CER Design Package will be the main deliverable of this phase of work, which confirms the scope of work to be pursued in the detailed design phase, as well as provides a draft cost estimate, schedule, and planned delivery approach. While the scope of work will build on the scope of work defined as Alternative 2 in the Geary BRT environmental documents, it will be refined in parallel with Task 2 Outreach activities defined below. In particular, the environmental document did not produce a detailed curb plan that is a key component that the CER Phase outreach is designed to develop in partnership with key stakeholders.

The scope of work is expected to include:

- a. Concrete Work* for bus bulbs (approx. 7), pedestrian bulbs (approx. 32), enhanced center median refuges (approx. 30), and upgrading curb ramps to ADA standards (approx. 14).
- b. Traffic Signal Upgrades and Improvements* including replacing old traffic signals at the end of their useful life (approx. 13 signals), signal upgrades such as adding mast arms, as well as upgrading the existing wireless Transit Signal Priority technology to more reliable fiber-optic technology from Stanyan Street to 25th Ave.
- c. Transit Lanes* to provide continuous dedicated transit lanes adjacent to the parking lane wherever feasible. This includes conversion of angled parking to parallel parking along Geary Boulevard through the Central Richmond, in order to maintain two general purpose travel lanes per direction plus provide a transit lane. In general, converting from angled parking to parallel parking reduces parking by 1-2 spaces per block face (and additional proposed improvements such as bus and pedestrian bulbs may also decrease available parking on blocks where they are recommended).
- d. Curb Plan* to update curb designations to reflect existing needs and new curb management tools. SFMTA staff conducted a loading survey in Summer 2021 to understand adjacent merchants curb needs. Using this input as well as professional expertise, SFMTA staff will recommend designations for the affected curb within the project limits including commercial yellow loading zones, passenger loading zones, green short-term parking zones, and blue ADA parking zones. This curb plan will consider how any new Shared Space parklets affect curb space needs on affected blocks. In addition, new 5 minute general purpose loading zones that were piloted as a part of the Shared Spaces program will allow more flexibility for short-term pick-up and drop-off activities that could help address curb needs generated by food delivery services, Transportation Network Companies, and other short-term pick-up and drop-off needs.

A Draft Curb Plan will be developed and shared for input during Outreach Round 2 (Task 2) and then refined as a Final Curb Plan that will be used to write the parking and traffic legislation (Task 3).

- e. ***Bus Stop Optimization and Improvements*** (zone lengthening, stop removal and re-location) at approximately 13 bus stops. SFMTA staff will recommend locations where transit performance may benefit by re-locating bus stops from near-side to far-side, eliminating closely spaced stops, and lengthening substandard bus stop zones. These recommendations will be refined with input from community stakeholders including a survey targeted to transit riders implemented as a part of Outreach Round 1 as well as with direct outreach to stakeholders immediately adjacent to affected bus stops (Task 2). In addition, bus stop amenity upgrades could include new shelters, bike racks, and decorative treatments.
- f. ***Pedestrian Safety Upgrades*** including daylighting, installation of Leading Pedestrian Intervals, and signal re-timing for slower walk speeds

Deliverables: Conceptual Engineering Report, conceptual engineering drawings, internal and inter-agency design review TASC materials and process

2. Outreach

In order to support the design work under Task 1 CER Design Package, outreach will be conducted to inform key design questions as well as continue ongoing community dialogue as follows.

- a. ***Round 1:*** occurred in September 2021 (funded by other agency funding sources prior to completing this scope of work update). This round of outreach included a multi-lingual mailer to properties within 1-2 blocks of the project area, flyers posted at key locations along the corridor, pop-up in person outreach, an online open house using a StoryMaps website, participation in the Richmond Autumn Moon Festival, a virtual community meeting, and multi-lingual surveys distributed via meal deliveries for low-income seniors at several senior centers. Key areas of input sought included: stakeholder level of support for new side-running configuration recommendation, proposed bus stop consolidations and removals, and block-specific feedback on existing transit/parking/loading/safety challenges to inform draft project design
- b. ***Round 2:*** anticipated in early 2022. This round of outreach would share a full draft block-by-block design for stakeholder input. The outreach methods will be finalized in late 2021 but are generally expected to include similar techniques to Outreach Round 1.
- c. ***Round 3:*** anticipated in 2022. This round of outreach would inform stakeholders of how the design being brought to the SFMTA Board for potential action was

informed by stakeholder feedback and share the opportunity to provide public comment to the SFMTA Board. Outreach methods would include a multi-lingual mailer and flyers posted throughout the corridor to advertise the policy-making meetings where feedback can be shared with decision-makers.

- d. ***Direct stakeholder outreach.*** throughout the entire planning process, direct stakeholder outreach will be conducted as needed to resolve location-specific design questions. This would include outreach to properties immediately adjacent to proposed bus stop re-locations, as well as ongoing direct outreach to key stakeholders.
- e. ***Ongoing Geary CAC meetings.*** Since 2017, the SFMTA has staffed a Geary Community Advisory Committee as a successor the SFCTA-convened CAC that met during the planning and environmental phases. The Geary CAC has provided advice and input to the SFMTA on both phases of the Geary Bus Rapid Transit Project. The CAC is envisioned to continue meeting through completion of both phases of the project and this item provides for ongoing staffing of the body during the CER phase.

Deliverables:

- Three rounds of outreach, meeting notes from stakeholder meetings, Geary CAC presentation materials and minutes
- Provide draft designs to SFCTA and District Supervisor with sufficient time for feedback prior to public outreach round 2, including benefits and impacts,
- Provide revised designs, summary of outreach feedback, and articulation of any changes to SFCTA and District Supervisor with sufficient time for feedback following public outreach round 2, but before handoff to environmental consultants, including benefits and impacts.

3. Approvals

Needed local and federal approvals will be obtained including:

- a. ***Environmental approvals.*** Policy actions would be needed by both the SFCTA and SFMTA Board to confirm selection of a new locally preferred alternative consistent with the side-running alternative. In addition, coordination with the Federal Transit Administration would be needed to obtain an amended Record of Decision (ROD). SFCTA previously acted as the lead agency for environmental approvals, but SFMTA will now take over this role. SFMTA expects to complete environmental analysis in Spring 2022 and anticipates FTA issuing an Amended ROD in Fall 2023.

- b. ***Parking and traffic legislation.*** SFMTA staff will prepare needed documentation, noticing, and presentation materials to seek parking and traffic legislation of the project.

Deliverables: SFCTA and SFMTA LPA re-selection resolutions, FTA Amended Record of Decision, SFMTA parking and traffic legislation.

Deliverables and Tentative Interim Deliverables Schedule

There are several unknowns beyond the SFMTA staff team's control that could affect the schedule, but the below summarizes potential dates for interim deliverables leading to completion of this phase of work.

- **Late 2021:** Draft block-by-block design
- **Early 2022:** Outreach Round 2
- **Early Spring 2022:** Revised block-by-block design based on Outreach Round 2 feedback for initiating environmental review documentation
- **Late Spring 2022:** Finalized environmental analysis, TASC process
- **Summer 2022:** Outreach Round 3, SFCTA and SFMTA Board actions, Final CER package
- **Fall 2023:** FTA Amended ROD

Type of Environmental Clearance Required

Because of the recommendation to pursue a side-running transit lane design instead of a center-running design, it is anticipated that additional policy actions will be required at the SFCTA and SFMTA Boards to select a new Locally Preferred Alternative and adopt new CEQA Findings; and that the Federal Transit Administration will need to issue an amended ROD. Whereas SFCTA has acted as the environmental lead agency up to this point, SFMTA will now assume the role of lead agency. After the SFMTA finalizes the recommended scope, the SFMTA will work with its consultants to document the scope determine what additional documentation is needed to proceed. Because the EIR/EIS evaluated a side-running alternative (Alternative 2) to the same level of detail as the Locally Preferred Alternative, and the final scope is expected to be substantially similar to the already-evaluated side-running alternative, it is expected that the level of analysis and documentation needed will be minor. While there is some risk that the time it will take to complete needed policy actions may take longer than anticipated, the project schedule can proceed with some design at-risk activities in parallel, following a similar approach to the Geary Rapid Project.

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2021/22
Project Name:	Geary BRT Phase 2 CER (Geary Boulevard Improvement Project) [Amendment]
Grant Recipient:	San Francisco Municipal Transportation Agency

ENVIRONMENTAL CLEARANCE

Environmental Type:	EIR/EIS
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PROJECT DELIVERY MILESTONES

Phase	Start		End	
	Quarter	Calendar Year	Quarter	Calendar Year
Planning/Conceptual Engineering (PLAN)	Apr-May-Jun	2007	Apr-May-Jun	2008
Environmental Studies (PA&ED)	Jul-Aug-Sep	2011	Oct-Nov-Dec	2023
Right of Way				
Design Engineering (PS&E)	Jul-Aug-Sep	2021	Jan-Feb-Mar	2024
Advertise Construction	Jan-Feb-Mar	2024		
Start Construction (e.g. Award Contract)	Apr-May-Jun	2022		
Operations (OP)				
Open for Use			Apr-May-Jun	2025
Project Completion (means last eligible expenditure)			Apr-May-Jun	2026

SCHEDULE DETAILS

Community Outreach:

MTA currently anticipates 3 rounds of outreach to support this phase of work in Fall 2021, late 2021, and Spring 2022 as further described in the attached Scope of Work Task 2.

Start Construction begins before Advertise Construction because initial Quick Build installation of transit lanes, stop changes, and some safety improvements would be done by SFMTA Shops. (Quick Build design: 5/2022, construction 6/2022 - 10/2022)

Advertise Construction begins before Design Engineering concludes because work would be delivered via two construction contracts. See "Draft schedule by project sub-phase" in the attached scope for details.

Project Coordination: There is potential for SFPUC water and sewer and SFPW paving to be coordinated with this project, which could affect the draft schedule milestones shown above, depending on their staffing and funding availability. See "Draft schedule by project sub-phase".

Project Delivery: Two separate contracts are planned to be issued, one for underground utilities (including conduits for fiber-optic cables) and a separate one for surface work, in order to control costs and quality. This means detailed design would continue while the first contract is being advertised. SFMTA to lead remaining environmental work, which is reflected here but not on the Funding Plan/ Cash Flow tables.

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2021/22
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FUNDING PLAN - FOR CURRENT REQUEST

Fund Source	Planned	Programmed	Allocated	Project Total
EP-101: Rapid Bus Network	\$0	\$0	\$4,427,317	\$4,427,317
Phases In Current Request Total:	\$0	\$0	\$4,427,317	\$4,427,317

FUNDING PLAN - ENTIRE PROJECT (ALL PHASES)

Fund Source	Planned	Programmed	Allocated	Project Total
PROP K	\$0	\$10,000,000	\$9,177,081	\$19,177,081
Congestion Management Agency Planning Funds	\$0	\$0	\$237,754	\$237,754
Local Funds (e.g. 2015 Prop A General Obligation Bonds)	\$3,655,000	\$0	\$0	\$3,655,000
TBD (e.g. OBAG, TPI [LCTOP], TIRCP, AHSC, Local [Prop B General Funds])	\$33,335,000	\$0	\$0	\$33,335,000
Funding Plan for Entire Project Total:	\$36,990,000	\$10,000,000	\$9,414,835	\$56,404,835

COST SUMMARY

Phase	Total Cost	PROP K - Current Request	Source of Cost Estimate
Planning/Conceptual Engineering	\$390,000		Actual
Environmental Studies	\$4,597,518		Actual
Right of Way	\$0		
Design Engineering	\$9,082,317	\$4,427,317	Based on previous projects, including Geary BRT Phase 1. Includes previous expenditures and estimate cost to complete
Construction	\$42,335,000		Based on previous projects, including Geary BRT Phase 1
Operations	\$0		
Total:	\$56,404,835	\$4,427,317	

% Complete of Design:	5.0%
As of Date:	08/26/2021

Expected Useful Life:	30 Years
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Geary Phase 2 - CER Budget updated for side-running

8/27/2021

		Rate	Hrs	ETC		Notes/assumptions
				Cost		
Streets Labor	5502 PM1 - Liz Brisson	\$ 195	560	\$ 109,296		PM for environmental and legislation
	5502 PM1 - Dan Mackowski	\$ 195	1200	\$ 234,206		PM for implementation and PE
	TP2 - David Sindel	\$ 141	1040	\$ 146,242		Planner supporting environmental, legislation, outreach tasks
	9172 Manager 2 - Francesca Napolitan	\$ 186	160	\$ 29,688		Will supervise preparation of curb plan
	5277 Planner 1 - Tracy Minicucci	\$ 118	400	\$ 47,163		Will prepare curb plan
	Sr Engineer	\$ 241	80	\$ 19,253		Will provide senior engineer review as-needed
Subtotal				\$ 585,848		
Comms Labor	1314 Public Relations Officer	\$ 194	960	\$ 186,203		Lead for developing and implementing public outreach activities
	5320 Illustrator and Art Designer	\$ 170	120	\$ 20,373		Will prepare graphic design materials as needed
	1312 Public Information Officer	\$ 165	480	\$ 79,367		Will provide outreach support to 1314 PRO
Subtotal				\$ 285,943		
Direct costs/ professional services	Env consultant			\$ 200,000		Conservative estimate, could decrease depending on scale of env work needed TBD after finalizing draft final scope
	Comms Direct Costs			\$ 130,000		Based on previous projects
Subtotal				\$ 330,000		
Public Works CER Funding				\$ 404,384		SFPW time to prepare scope documents and preliminary base map before detailed design
Environmental Review Team Labor	5290 Transit Planner 4	\$ 192	10	\$ 1,921		
	5289 Transit Planner 3	\$ 164	40	\$ 6,560		
Subtotal				\$ 8,481		
City Atty				\$ 25,000		CAO review, based on previous projects
Contingency				\$ 61,764		5% of estimated costs
Total for side-running CER				\$ 1,701,419.76		
Expenditure to date				\$ 2,725,897.65		
Original grant				\$ 6,319,470.00		
Amount to de-obligate				\$ 1,892,152.59		

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2021/22
Project Name:	Geary BRT Phase 2 CER (Geary Boulevard Improvement Project) [Amendment]
Grant Recipient:	San Francisco Municipal Transportation Agency

SFCTA RECOMMENDATION

Resolution Number:		Resolution Date:	
Total PROP K Requested:	\$4,427,317	Total PROP K Recommended	\$1,767,946

SGA Project Number:	101-907053	Name:	Geary BRT Phase 2 CER (Geary Boulevard Improvement Project)
Sponsor:	San Francisco Municipal Transportation Agency	Expiration Date:	09/30/2024
Phase:	Design Engineering	Fundshare:	100.0%

Cash Flow Distribution Schedule by Fiscal Year

Fund Source	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	FY 2025/26	Total
PROP K EP-101	\$1,767,946	\$0	\$0	\$0	\$0	\$1,767,946

Deliverables

1. Monthly progress reports shall include % complete of the funded phase, % complete by task, work performed in the prior month, work anticipated to be performed in the upcoming month, and any issues that may impact schedule, in addition to all other requirements described in the Standard Grant Agreement.
2. Monthly progress reports shall include a summary of outreach performed the prior month (including meetings of the Geary CAC) and feedback received.
3. Monthly progress reports shall include a summary of coordination efforts other City agencies regarding delivery of the project, including on potential sewer and water upgrades, and re-paving, and shall describe the delivery plan once it is finalized.
4. Prior to conducting public outreach round 2 (anticipated January 2022) SFMTA staff shall provide the following to Transportation Authority staff with sufficient time for review and comment: draft project designs on a block-by-block basis; preliminary assessment of benefits and impacts; cost estimate and funding plan; and draft outreach materials for public outreach round 2.
5. Upon completion of public outreach round 2 and prior to conducting supplemental environmental review for the project (anticipated Spring 2022) SFMTA staff shall provide the following to Transportation Authority staff with sufficient time for review and comment: summary of feedback received during outreach round 2 and how the SFMTA is addressing that feedback, as appropriate; revised project designs on a block-by-block basis with a description of changes made in response to public outreach; updated assessment of benefits and impacts; cost estimate and funding plan; and draft outreach materials for public outreach round 3.
6. Upon completion of public outreach round 3 and prior to initiating Transportation Authority Board consideration and legislative approval process (anticipated Summer 2022) SFMTA staff shall provide the following to Transportation Authority staff with sufficient time for review and comment: draft designs with corresponding benefits and impacts; cost estimate and funding plan; and draft final assessment of benefits and impacts and draft environmental findings for revised locally preferred alternative.

7. Upon completion, provide Conceptual Engineering Report, conceptual engineering drawings, internal and inter-agency design review TASC materials and process

8. Upon completion, Sponsor shall provide an updated scope, schedule, budget, and funding plan for design and construction. This deliverable may be met with an allocation request for design and quick-build construction.

Special Conditions

1. \$1,200,000 of the remaining project funding (\$1,767,946) is on reserve, to be released by the Board, pending agreement between the District 1 Supervisor's Office, Transportation Authority staff, and SFMTA staff on the proposed draft project designs on a block-by-block basis, and review of preliminary assessment of benefits and impacts, cost estimate and funding plan, and draft outreach materials for public outreach round 2

Notes

1. Funds were allocated through Board approval of Resolution 2016-006 in July 2015.

2. This amendment allows up to \$100,000 in retroactive expenditures against the existing grant dating back to 9/1/2021 for SFPW base maps. Charges between 12/31/2019 (the original fund expiration date) and 9/1/2021 are not eligible for reimbursement from this grant.

Metric	PROP K	TNC TAX	PROP AA
Actual Leveraging - Current Request	0.0%	No TNC TAX	No PROP AA
Actual Leveraging - This Project	66.0%	No TNC TAX	No PROP AA

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2021/22
Project Name:	Geary BRT Phase 2 CER (Geary Boulevard Improvement Project) [Amendment]
Grant Recipient:	San Francisco Municipal Transportation Agency

EXPENDITURE PLAN SUMMARY

Current PROP K Request:	\$4,427,317
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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:
LB

CONTACT INFORMATION

	Project Manager	Grants Manager
Name:	Daniel Mackowski	Joel C Goldberg
Title:	Project Manager	Grants Procurement Manager
Phone:	(415) 646-2572	(415) 646-2520
Email:	daniel.mackowski@sfmta.com	joel.goldberg@sfmta.com

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Transit Travel Time

Table 1. Observed Geary Corridor Bus Travel Times

50th Percentile Travel Times, PM Peak Period, 33rd Avenue to Arguello Street

ROUTE	DIRECTION	Pre-COVID	COVID, after TETL	
		Jan/Feb 2020	Jan/Feb 2021	Mar/Apr 2021
38 Geary	EB	15:38	14:39	14:24
	WB	15:43	14:52	14:26
38R Geary	EB	12:03	11:53	11:43
	WB	12:44	12:06	11:41
38/38R	Both	14:02	13:22	13:04

Source: SFMTA, 38 Geary Temporary Emergency Transit Lanes Project Evaluation Report, May 2021

Table 2. Geary Corridor Bus Travel Time Reduction Compared with Port-TETL Conditions

PM Peak Period, 34th Avenue to Stanyan Street

SCENARIO	ROUTE	DIRECTION	TRAVEL TIME REDUCTION FROM CURRENT CONDITIONS, INCLUDING TETL (TTRP METHODOLOGY)		
			LPA	ALTERNATIVE 2	SFMTA PROJECT PROPOSAL
Opening Year	38 Geary	EB	04:31	01:30	03:05
		WB	04:06	01:30	02:32
	38R Geary	EB	01:37	01:50	02:29
		WB	01:32	01:50	01:47
Average	38/38R	Both	02:57	01:40	02:28

Source: Fehr & Peers and SFCTA, 2014. FEIS Table 3.3-6 updated by SFMTA and SFCTA, 2022.

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Parking Impacts

Table 3. Change in Area-wide Public Parking Supply in the Geary Corridor, by Alternative and Corridor Segment

CORRIDOR SEGMENT	ESTIMATE D PUBLIC PARKING SPACES IN AREA	AREA-WIDE PUBLIC PARKING SUPPLY (WITH % CHANGE)		
		CENTER RUNNING (Hybrid in FEIS)	SIDE RUNNING (Alt. 2 in FEIS)	SIDE UPDATE (Current Proposal)
34th Avenue –25th Avenue	1,000	960 (-4%)	950 (-6%)	980 (-2%)
25th Avenue –Park Presidio	1,430	1,410 (-1%)	1,380 (-4%)	1,390 (-3%)
Park Presidio –Palm/Jordan	1,750	1,750 (0%)	1,710 (-2%)	1,730 (-1%)
Total	4,180	4,120	4,040	4,100
Side-street additions		0	0	30
Total parking change		4,120	4,040	4,130

Note: SFCTA rounded to nearest ten. Not all numbers sum correctly due to rounding.

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Bus Stops and Transit Lanes

Intersection/Block	FEIS Alternative 2		MTA Proposal (2022)		Changes	
	Bus Stops	Transit Lanes	Bus Stops	Transit Lanes	Bus Stops	Transit Lanes
West of 34th Ave		None		None		
34th Ave (to 33rd)	OB NS full-block BZ	IB & OB		None		Remove bus lane
33rd Ave (to 32nd)	IB NS full-block BZ	IB & OB	OB FS 90' BZ & IB NS 85' BZ	IB		Remove OB bus lane
32nd Ave (to 31st)	IB FS full-block BZ (layover)	IB & OB	IB FS full-block BZ (layover)	IB & OB		
					Remove layover extension	
31st Ave (to 30th)	IB FS BZ (layover)	IB & OB		IB & OB		
30th Ave (to 29th)	OB NS BZ & IB NS BZ	IB & OB	OB NS 100' BZ & IB NS 100' BZ	IB & OB		
29th Ave (to 28th)		IB & OB		IB & OB		
28th Ave (to 27th)	OB NS BZ & IB NS BZ	IB & OB	OB NS 78' BZ & IB NS 100' BZ	IB & OB		
27th Ave (to 26th)		IB & OB		IB & OB		
26th Ave (to 25th)	OB NS full-block BB	IB & OB		IB & OB		
25th Ave (to 24th)	IB NS full-block BB	IB & OB	OB NS 88' BB & IB FS 136' BB	IB & OB		
24th Ave (to 23rd)		IB & OB		IB & OB		
23rd Ave (to 22nd)	IB NS BZ	IB & OB	IB FS 90' BZ	IB & OB		
22nd Ave (to 21st)	OB NS BZ	IB & OB	OB FS 88' BZ	IB & OB		
21st Ave (to 20th)		IB & OB		IB & OB		
					Retain Rapid service	
20th Ave (to 19th)	OB NS BZ & IB NS BZ (local-only)	IB & OB	OB FS 140' BB & IB FS 146' BB	IB & OB		
19th Ave (to 18th)		IB & OB		IB & OB		
18th Ave (to 17th)		IB & OB		IB & OB		
17th Ave (to 16th)	OB NS BZ & IB NS BZ	IB & OB	OB FS 100' BZ & IB NS 103' BZ	IB & OB		
16th Ave (to 15th)		IB & OB		IB & OB		
15th Ave (to 14th)	OB NS full-block BB	IB & OB		IB & OB		

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Bus Stops and Transit Lanes

Intersection/Block	FEIS Alternative 2		MTA Proposal (2022)		Changes	
	Bus Stops	Transit Lanes	Bus Stops	Transit Lanes	Bus Stops	Transit Lanes
14th Ave (to PP)	IB NS full-block BB	IB & OB		IB & OB		
Park Presidio (to Funston)		IB & OB	OB FS 118' BB & IB FS 120' BB	IB & OB		
Funston Ave (to 12th)		IB & OB		IB & OB		
12th Ave (to 11th)	OB NS BZ & IB NS BZ	IB & OB		IB & OB	Remove local stops	
11th Ave (to 10th)		IB & OB		IB & OB		
10th Ave (to 9th)		IB & OB		IB & OB		
9th Ave (to 8th)	OB FS BZ & IB FS BZ	IB & OB	OB FS 104' BZ & IB FS 80' BZ	IB & OB		
8th Ave (to 7th)		IB & OB		IB & OB		
7th Ave (to 6th)		IB & OB		IB & OB		
6th Ave (to 5th)	OB NS full-block BB & IB NS full-block BB	IB & OB	OB FS 132' BB & IB FS 148' BB	IB & OB		
5th Ave (to 4th)		IB & OB		IB & OB		
4th Ave (to 3rd)	IB NS BZ	IB & OB		IB & OB		
3rd Ave (to 2nd)	OB NS BZ	IB & OB	OB FS 108' BZ & IB NS 117' BZ	IB & OB		
2nd Ave (to Arguello)	OB NS full-block BB	IB & OB		IB & OB		
Arguello Blvd (to Palm)	IB NS full-block BB	IB & OB	OB FS 151' BB & IB FS 132' BB	IB & OB		
Palm Ave (to Stanyan)		IB & OB		IB & OB		
Stanyan St (to east)	IB NS BZ	IB & OB	IB NS 92' BZ	IB & OB		

Legend

	Added proposal in Side relative to Alt2
	Less proposed scope than Alt2
	Slightly different but substantially similar
	Installed since EIR/S

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Parking

Intersection/Block	FEIS Alternative 2	MTA Proposal (2022)	Changes
West of 34th Ave	Parallel	Parallel	
34th Ave (to 33rd)	None	Parallel	
33rd Ave (to 32nd)	Parallel	Parallel	
32nd Ave (to 31st)	Parallel	Parallel	
31st Ave (to 30th)	Parallel	Parallel	
30th Ave (to 29th)	Parallel	Parallel	
29th Ave (to 28th)	Parallel	Angled north. Geary parallel	
28th Ave (to 27th)	Parallel	Parallel	
27th Ave (to 26th)	Parallel	Parallel	
26th Ave (to 25th)	Parallel	Angled north. Geary parallel	
25th Ave (to 24th)	Parallel	Parallel	
24th Ave (to 23rd)	Parallel	Angled north. Geary parallel	
23rd Ave (to 22nd)	Parallel	Angled north. Geary parallel	
22nd Ave (to 21st)	Parallel	Parallel	
21st Ave (to 20th)	Parallel	Parallel	
20th Ave (to 19th)	Parallel	Parallel	
19th Ave (to 18th)	Parallel	Angled south. Geary parallel	
18th Ave (to 17th)	Parallel	Angled north. Geary parallel	
17th Ave (to 16th)	Parallel	Angled south. Geary parallel	
16th Ave (to 15th)	Parallel	Parallel	
15th Ave (to 14th)	Parallel	Parallel	
14th Ave (to PP)	None	Angled north. Geary none	
Park Presidio (to Funston)	None	None	
Funston Ave (to 12th)	Parallel	Angled south. Geary parallel	
12th Ave (to 11th)	Parallel	Parallel	
11th Ave (to 10th)	Parallel	Parallel	
10th Ave (to 9th)	Parallel	Parallel	
9th Ave (to 8th)	Parallel	Parallel	

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Parking

Intersection/Block	FEIS Alternative 2	MTA Proposal (2022)	Changes
8th Ave (to 7th)	Parallel	Parallel	
7th Ave (to 6th)	Parallel	Parallel	
6th Ave (to 5th)	Parallel	Parallel	
5th Ave (to 4th)	Parallel	Parallel	
4th Ave (to 3rd)	Parallel	Parallel	
3rd Ave (to 2nd)	Parallel	Parallel	
2nd Ave (to Arguello)	Parallel	Parallel	
Arguello Blvd (to Palm)	Parallel	Parallel	
Palm Ave (to Stanyan)	Parallel	Parallel	
Stanyan St (to east)	Parallel	Parallel	

Legend	
	Added proposal in Side relative to Alt2
	Less proposed scope than Alt2
	Slightly different but substantially similar
	Installed since EIR/S

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Turn Restrictions and Turn Pockets

Intersection/Block	FEIS Alternative 2		MTA Proposal (2022)		Changes	
	Turn Restriction	Turn Pocket	Turn Restriction	Turn Pocket	Turn Restriction	Turn Pocket
West of 34th Ave						
34th Ave (to 33rd)				NB/SB ALL		
33rd Ave (to 32nd)		WBLT extend	EBLT	EBRT		
32nd Ave (to 31st)						
31st Ave (to 30th)						
30th Ave (to 29th)						
29th Ave (to 28th)						
28th Ave (to 27th)				EB/WBRT		
27th Ave (to 26th)			EBLT			
26th Ave (to 25th)			WBLT			
25th Ave (to 24th)						
24th Ave (to 23rd)						
23rd Ave (to 22nd)				NB/SB ALL		
22nd Ave (to 21st)			WBLT			
21st Ave (to 20th)						
20th Ave (to 19th)						
19th Ave (to 18th)			WBLT			
18th Ave (to 17th)			EBLT			
17th Ave (to 16th)						
16th Ave (to 15th)						
15th Ave (to 14th)				EB/WBRT, NB/SB ALL		
14th Ave (to PP)		WBRT	WBRT			
Park Presidio (to Funston)		EB/WBRT		EB/WBRT		
Funston Ave (to 12th)		EBRT	EBRT			
12th Ave (to 11th)			WBLT			
11th Ave (to 10th)			EBLT			

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Turn Restrictions and Turn Pockets

Intersection/Block	FEIS Alternative 2		MTA Proposal (2022)		Changes	
	Turn Restriction	Turn Pocket	Turn Restriction	Turn Pocket	Turn Restriction	Turn Pocket
10th Ave (to 9th)						
9th Ave (to 8th)				EBRT		
8th Ave (to 7th)			EBLT	NB/SB ALL		
7th Ave (to 6th)			WBLT existing			
6th Ave (to 5th)						
5th Ave (to 4th)						
4th Ave (to 3rd)			WBLT			
3rd Ave (to 2nd)			EBLT existing			
2nd Ave (to Arguello)						
Arguello Blvd (to Palm)						
Palm Ave (to Stanyan)						
Stanyan St (to east)				EBRT		
Count	0	4	12	9	12	6

Legend

Added proposal in Side relative to Alt2

Less proposed scope than Alt2

Slightly different but substantially similar

Installed since EIR/S

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Median Refuges

Intersection/Block	FEIS Alternative 2	MTA Proposal (2022)	Changes
West of 34th Ave		Existing	
34th Ave (to 33rd)		Existing	
33rd Ave (to 32nd)		Existing	
32nd Ave (to 31st)		Existing	
31st Ave (to 30th)			
30th Ave (to 29th)			
29th Ave (to 28th)		Refuges	
28th Ave (to 27th)		Refuges	
27th Ave (to 26th)		West refuge	
26th Ave (to 25th)		East median	
25th Ave (to 24th)		Refuges	
24th Ave (to 23rd)		Refuges	
23rd Ave (to 22nd)			
22nd Ave (to 21st)		East refuge	
21st Ave (to 20th)		Refuges	
20th Ave (to 19th)		Refuges	
19th Ave (to 18th)		East refuge	
18th Ave (to 17th)		West median	
17th Ave (to 16th)		Refuges	
16th Ave (to 15th)		Refuges	
15th Ave (to 14th)			
14th Ave (to PP)			
Park Presidio (to Funston)		East, south & west refuges	
Funston Ave (to 12th)			
12th Ave (to 11th)		East refuge	
11th Ave (to 10th)		West refuge	
10th Ave (to 9th)		Refuges	
9th Ave (to 8th)		Refuges	

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Median Refuges

Intersection/Block	FEIS Alternative 2	MTA Proposal (2022)	Changes
8th Ave (to 7th)	Existing	West refuge	
7th Ave (to 6th)		East median	
6th Ave (to 5th)		Existing	
5th Ave (to 4th)		Refuges	
4th Ave (to 3rd)		East refuge	
3rd Ave (to 2nd)		West refuge	
2nd Ave (to Arguello)		Refuges	
Arguello Blvd (to Palm)		Existing	
Palm Ave (to Stanyan)		Existing	
Stanyan St (to east)			

Legend	
	Added proposal in Side relative to Alt2
	Less proposed scope than Alt2
	Slightly different but substantially similar
	Installed since EIR/S

[illegible]

Geary Boulevard Improvement Project
Preliminary Assessment of Benefits and Impacts
Pedestrian Bulbouts

Intersection/Block	FEIS Alternative 2				MTA Proposal (2022)				Changes			
	NW	NE	SE	SW	NW	NE	SE	SW	NW	NE	SE	SW
9th Ave (to 8th)		G		G								
8th Ave (to 7th)												
7th Ave (to 6th)		G	T									
6th Ave (to 5th)	G	T	G	T	T	G	T	GS				
5th Ave (to 4th)	T			G								
4th Ave (to 3rd)					GS	G	GS	G				
3rd Ave (to 2nd)	G		G	G		G						
2nd Ave (to Arguello)		T	T									
Arguello Blvd (to Palm)	T	Ex		T	Ex	Ex	T	Ex				
Palm Ave (to Stanyan)	Ex				Ex							
Stanyan St (to east)												
Count	15	11	14	11	10	12	9	10	-5	1	-5	-1

Legend

Added proposal in Side relative to Alt2

Less proposed scope than Alt2

Slightly different but substantially similar

Installed since EIR/S

T Transit bulb serves as ped bulb

G Ped bulb on Geary

S Ped bulb on side street

GS Ped bulb on Geary and side street

RC Raised crosswalk

Ex Existing



RESOLUTION AMENDING THE ADOPTED FISCAL YEAR 2021/22 BUDGET TO INCREASE REVENUES BY \$1.7 MILLION, DECREASE EXPENDITURES BY \$13.3 MILLION AND DECREASE OTHER FINANCING SOURCES BY \$50.0 MILLION FOR A TOTAL NET DECREASE IN FUND BALANCE OF \$34.7 MILLION

WHEREAS, In June 2021, through approval of Resolution 21-56, the Transportation Authority adopted the Fiscal Year (FY) 2021/22 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, Revenue and expenditure revisions are related to the Traffic Congestion Mitigation Tax (TNC Tax) Revenues, interest income, program revenues, and capital project costs reported in the Sales Tax Program (Prop K), Congestion Management Agency Programs, Transportation Fund for Clean Air Program (TFCA), Vehicle Registration Fee for Transportation Improvements Program (Prop AA), and the TNC Tax Program; and

WHEREAS, Major changes in revenues due to additional funding include the following: Downtown Rail Extension Program's FTA Project Development Process and 4th and King Railyards Preliminary Business Case Process, Golden Gate Park Equity Study, Capital Project Delivery Best Practices, District 7 Ocean Avenue Mobility Action Plan, District 6 Treasure Island Supplemental Transportation Study, Muni Metro Core Capacity Study - Project Support and Technical Oversight, Priority Conservation Area Program and Senate Bill 1 Local Partnership Program (SB1 LPP) for Yerba Buena Island Multi-Use Path, Infill Infrastructure Grant Program for Yerba Buena Island Hillcrest Road Widening Design, and SB1 LPP for I-280 Southbound Ocean Avenue Off-Ramp Realignment Project; and major changes in revenues due to increase in revenue estimates include the following: TNC Tax Revenue, and Interstate 80/YBI Interchange Improvement Project and Yerba Buena Bridge Structures (YBI Projects) - Southgate Road Realignment Improvements; and



WHEREAS, Major changes in expenditures due to project delays and/or project sponsors' prioritizing reimbursement from other fund sources include the following projects: Prop K projects, Prop AA projects, TFCA projects, TNC Tax SFMTA's Vision Zero Quick-Build Program, and YBI Projects – Pier E2 and Torpedo Building Rehabilitation; 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 2021/22 budget; and

WHEREAS, At its March 23, 2021 meeting, the Community Advisory Committee will be briefed on the proposed budget amendment asked to adopt a motion of support for the staff recommendation; now, therefore, be it

RESOLVED, That the Transportation Authority's adopted FY 2021/22 budget is hereby amended to increase revenues by \$1.7 million, decrease expenditures by \$13.3 million, and decrease other financing sources by \$50.0 million, for a total net decrease in fund balance of \$34.7 million, as shown in Attachment 1.

Attachment:

1. Proposed Fiscal Year 2021/22 Budget Amendment



**San Francisco
County Transportation
Authority**

**Attachment 1
Proposed Fiscal Year 2021/22 Budget Amendment**

Proposed Budget Amendment by Fund							
	Sales Tax Program	Congestion Management Agency Programs	Transportation Fund for Clean Air Program	Vehicle Registration Fee for Transportation Improvements Program	Treasure Island Mobility Management Agency Program	Traffic Congestion Mitigation Tax Program	Budget Amendment Fiscal Year 2021/22
Revenues:							
Sales Tax Revenues	\$ 92,879,800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 92,879,800
Vehicle Registration Fee	-	-	-	4,834,049	-	-	4,834,049
Traffic Congestion Mitigation Tax	-	-	-	-	-	5,880,000	5,880,000
Interest Income	296,145	-	868	900	-	26,848	324,761
Program Revenues	-	20,561,738	672,708	-	2,770,723	-	24,005,169
Other Revenues	-	-	-	-	-	-	-
Total Revenues	93,175,945	20,561,738	673,576	4,834,949	2,770,723	5,906,848	127,923,779
Expenditures							
Capital Project Costs	136,587,261	28,500,946	1,060,567	8,953,445	1,821,094	1,700,000	178,623,313
Administrative Operating Costs	7,234,698	3,595,082	42,044	241,702	1,015,028	176,400	12,304,954
Debt Service Costs	21,722,350	-	-	-	-	-	21,722,350
Total Expenditures	165,544,309	32,096,028	1,102,611	9,195,147	2,836,122	1,876,400	212,650,617
Other Financing Sources (Uses):	38,400,311	11,534,290	-	-	65,399	-	50,000,000
Net change in Fund Balance	\$ (33,968,053)	\$ -	\$ (429,035)	\$ (4,360,198)	\$ -	\$ 4,030,448	\$ (34,726,838)
Budgetary Fund Balance, as of July 1	\$ 59,972,084	\$ -	\$ 777,219	\$ 14,834,640	\$ -	\$ 5,377,923	\$ 80,961,866
Budgetary Fund Balance, as of June 30	\$ 26,004,031	\$ -	\$ 348,184	\$ 10,474,442	\$ -	\$ 9,408,371	\$ 46,235,028



Memorandum

AGENDA ITEM 10

DATE: March 17, 2022

TO: Transportation Authority Board

FROM: Cynthia Fong – Deputy Director for Finance and Administration

SUBJECT: 3/22/22 Board Meeting: Amend the Adopted Fiscal Year 2021/22 Budget to Increase Revenues by \$1.7 Million, Decrease Expenditures by \$13.3 Million and Decrease Other Financing Sources by \$50.0 Million for a Total Net Decrease in Fund Balance of \$34.7 Million

RECOMMENDATION ☐ Information ☒ Action

Amend the adopted Fiscal Year (FY) 2021/22 budget to increase revenues by \$1.7 million, decrease expenditures by \$13.3 million and decrease other financing sources by \$50.0 million for a total net decrease in fund balance of \$34.7 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 June 2021, through Resolution 21-56, the Board adopted the FY 2021/22 Annual Budget and Work Program.

The effect of the amendment on the adopted FY 2021/22 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.

- ☐ 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 an increase of \$1.7 million in revenues, a decrease of \$13.3 million in expenditures, and a decrease of \$50.0 million in other financing sources for a total net decrease of \$34.7 million in fund balance. These revisions include carryover revenues and expenditures from the prior period. Detailed budget revisions for the Treasure Island Mobility Management Agency (TIMMA) will be presented as a separate item to a future TIMMA Committee and TIMMA Board.

Revenue and expenditure revisions are related to the increase in Traffic Congestion Mitigation Tax (TNC Tax) revenues, federal and state program revenues, and capital project costs reported in the Congestion Management Agency Program, and decrease in interest income, regional and other program revenues, and several capital project costs reported in the Sales Tax Program, Transportation Fund for Clean Air Program (TFCA), Vehicle Registration Fee for Transportation Improvements Program (Prop AA), and Traffic Congestion Mitigation Tax (TNC Tax) Program. Major changes in revenue and expenditure line items, which are detailed in Attachment 4, include the following:

- **New Prop K Appropriation Funding**
 - Downtown Rail Extension Program's Federal Transit Administration Project Development Process and 4th and King Railyards Preliminary Business Case Process
 - Golden Gate Park Equity Study
 - Capital Project Delivery Best Practices
 - District 7 Ocean Avenue Mobility Action Plan
 - District 6 Treasure Island Supplemental Transportation Study
 - Muni Metro Core Capacity Study - Project Support and Technical Oversight (pending)
- **New Federal and State Funding**
 - Priority Conservation Area Program and Senate Bill 1 Local Partnership Program (SB1 LPP) for Yerba Buena Island Multi-Use Path



- Infill Infrastructure Grant Program for Yerba Buena Island Hillcrest Road Widening Design
- SB1 LPP for I-280 Southbound Ocean Avenue Off-Ramp Realignment Project
- **Increase in Revenue Estimates**
 - TNC Tax
 - Interstate 80/YBI Interchange Improvement Project and Yerba Buena Bridge Structures (YBI Projects) – Southgate Road Realignment Improvements
- **Project Delays and/or Prioritizing Reimbursement from Other Fund Sources**
 - Prop K Projects (various projects detailed in Attachment 4, page 5)
 - Prop AA Projects (various projects detailed in Attachment 4, page 7)
 - TFCA Projects (various projects detailed in Attachment 4, page 6)
 - TNC Tax SFMTA's Vision Zero Quick-Build Program
 - YBI Projects – Pier E2 and Torpedo Building Rehabilitation

Additionally, administrative operating costs, debt service costs and other financing sources need to be updated from the original estimates contained in the adopted FY 2021/22 budget:

- increased administrative operating costs for computer network system upgrades; and
- decreased debt service costs due to lower interest expenses related to the Revolving Credit Agreement; and
- decreased anticipated drawdown on the Revolving Credit Agreement partially due to a higher ending fund balance in FY 2021/22 and Sales Tax Program capital expenditures coming in \$14.1 million lower than anticipated in FY 2021/22.

FINANCIAL IMPACT

The proposed amendment to the FY 2021/22 budget would increase revenues by \$1.7 million, decrease expenditures by \$13.3 million, and decrease other financing sources by \$50.0 million, for a total net decrease in fund balance of \$34.7 million, as described above.

CAC POSITION

The Community Advisory Committee (CAC) will consider this item at its March 23, 2022 meeting.



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



Proposed Budget Amendment by Fund							
	Sales Tax Program	Congestion Management Agency Programs	Transportation Fund for Clean Air Program	Vehicle Registration Fee for Transportation Improvements Program	Treasure Island Mobility Management Agency Program	Traffic Congestion Mitigation Tax Program	Budget Amendment Fiscal Year 2021/22
Revenues:							
Sales Tax Revenues	\$ 92,879,800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 92,879,800
Vehicle Registration Fee	-	-	-	4,834,049	-	-	4,834,049
Traffic Congestion Mitigation Tax	-	-	-	-	-	5,880,000	5,880,000
Interest Income	296,145	-	868	900	-	26,848	324,761
Program Revenues	-	20,561,738	672,708	-	2,770,723	-	24,005,169
Other Revenues	-	-	-	-	-	-	-
Total Revenues	93,175,945	20,561,738	673,576	4,834,949	2,770,723	5,906,848	127,923,779
Expenditures							
Capital Project Costs	136,587,261	28,500,946	1,060,567	8,953,445	1,821,094	1,700,000	178,623,313
Administrative Operating Costs	7,234,698	3,595,082	42,044	241,702	1,015,028	176,400	12,304,954
Debt Service Costs	21,722,350	-	-	-	-	-	21,722,350
Total Expenditures	165,544,309	32,096,028	1,102,611	9,195,147	2,836,122	1,876,400	212,650,617
Other Financing Sources (Uses):	38,400,311	11,534,290	-	-	65,399	-	50,000,000
Net change in Fund Balance	\$ (33,968,053)	\$ -	\$ (429,035)	\$ (4,360,198)	\$ -	\$ 4,030,448	\$ (34,726,838)
Budgetary Fund Balance, as of July 1	\$ 59,972,084	\$ -	\$ 777,219	\$ 14,834,640	\$ -	\$ 5,377,923	\$ 80,961,866
Budgetary Fund Balance, as of June 30	\$ 26,004,031	\$ -	\$ 348,184	\$ 10,474,442	\$ -	\$ 9,408,371	\$ 46,235,028



**San Francisco
County Transportation
Authority**

**Attachment 2
Proposed Fiscal Year 2021/22 Budget Amendment
Comparison of Revenues and Expenditures**

Category	Fiscal Year 2020/21 Actual	Fiscal Year 2021/22 Adopted Budget	Proposed Fiscal Year 2021/22 Budget Amendment	Variance from Fiscal Year 2021/22 Adopted Budget	% Variance
Sales Tax Revenues	\$ 86,530,445	\$ 92,879,800	\$ 92,879,800	\$ -	0.0%
Vehicle Registration Fee	5,513,643	4,834,049	4,834,049	-	0.0%
Traffic Congestion Mitigation Tax	5,625,880	4,199,300	5,880,000	1,680,700	40.0%
Interest Income	19,960	633,670	324,761	(308,909)	-48.7%
Program Revenues					
Federal	6,868,989	8,629,623	10,290,316	1,660,693	19.2%
State	125,865	3,587,961	5,066,932	1,478,971	41.2%
Regional and other	4,792,608	11,457,233	8,647,921	(2,809,312)	-24.5%
Other Revenues	35,328	46,500	-	(46,500)	-100.0%
Total Revenues	109,512,718	126,268,136	127,923,779	1,655,643	1.3%
Capital Project Costs	105,080,558	191,441,807	178,623,313	(12,818,494)	-6.7%
Administrative Operating Costs					
Personnel expenditures	7,087,755	9,226,939	8,997,784	(229,155)	-2.5%
Non-Personnel expenditures	2,556,765	3,098,252	3,307,170	208,918	6.7%
Debt Service Costs	21,681,509	22,192,850	21,722,350	(470,500)	-2.1%
Total Expenditures	136,406,587	225,959,848	212,650,617	(13,309,231)	-5.9%
Other Financing Sources (Uses)	-	100,000,000	50,000,000	(50,000,000)	-50.0%
Net change in Fund Balance	\$ (26,893,869)	\$ 308,288	\$ (34,726,838)	\$ (35,035,126)	-11364.4%
Budgetary Fund Balance, as of July 1	\$ 107,855,735	\$ 80,961,866	\$ 80,961,866		
Budgetary Fund Balance, as of June 30	\$ 80,961,866	\$ 81,270,154	\$ 46,235,028		



	Proposed Budget Amendment by Fund						Proposed Fiscal Year 2021/22 Budget Amendment
	Sales Tax Program	Congestion Management Agency Programs	Transportation Fund for Clean Air Program	Vehicle Registration Fee for Transportation Improvements Program	Treasure Island Mobility Management Agency Program	Traffic Congestion Mitigation Tax Program	
Revenues:							
Sales Tax Revenues	\$ 92,879,800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 92,879,800
Vehicle Registration Fee	-	-	-	4,834,049	-	-	4,834,049
Traffic Congestion Mitigation Tax	-	-	-	-	-	5,880,000	5,880,000
Interest Income	296,145	-	868	900	-	26,848	324,761
Program Revenues							
Federal							
Advanced Transportation and Congestion Management Technologies Deployment	-	-	-	-	982,750	-	982,750
Innovative Deployments to Enhance Arterials Shared Automated Vehicle	-	-	-	-	16,930	-	16,930
Highway Bridge Program - I-80/Yerba Buena Island (YBI) Interchange Improvement	-	7,211,027	-	-	-	-	7,211,027
Highway Bridge Program - YBI Bridge Structures	-	562,163	-	-	-	-	562,163
Priority Conservation Area Program - YBI Multi-Use Pathway	-	305,446	-	-	-	-	305,446
Surface Transportation Program 3% Revenue and Augmentation	-	1,212,000	-	-	-	-	1,212,000
State							
Affordable Housing and Sustainable Communities - I/80 YBI Interchange Improvement Project	-	3,430,743	-	-	-	-	3,430,743
Planning, Programming & Monitoring SB45 Funds	-	311,655	-	-	-	-	311,655
Infill Infrastructure Grant Program - Hillcrest Road Widening Project	-	204,157	-	-	-	-	204,157
Senate Bill 1 Local Partnership Program - I-280 SB Ocean Ave Off-Ramp Realignment Project	-	122,865	-	-	-	-	122,865
Senate Bill 1 Local Partnership Program - YBI Multi-Use Pathway Project	-	39,574	-	-	-	-	39,574
Seismic Retrofit Proposition 1B - I/80 YBI Interchange Improvement Project	-	805,765	-	-	-	-	805,765
Seismic Retrofit Proposition 1B - YBI Bridge Structures	-	30,354	-	-	-	-	30,354
Sustainable Communities - School Access Plan	-	121,819	-	-	-	-	121,819
Regional and other							
BATA - I-80/YBI Interchange Improvement	-	5,728,853	-	-	-	-	5,728,853
SFPW - Octavia Improvements Study	-	24,369	-	-	-	-	24,369
SFMTA - Lake Merced Pedestrian Safety	-	3,102	-	-	-	-	3,102
SFMTA - School Access Plan	-	19,502	-	-	-	-	19,502
SFMTA - Transit and Intercity Rail Capital Program	-	41,964	-	-	-	-	41,964
SF Planning - Housing Element	-	26,100	-	-	-	-	26,100
SFMTA - Travel Demand Modeling Assistance	-	75,000	-	-	-	-	75,000
TIDA - Treasure Island Mobility Management Agency	-	-	-	-	1,771,043	-	1,771,043
TIDA - YBI Interchange Improvement & Bridge Structures	-	285,280	-	-	-	-	285,280
Vehicle Registration Fee Revenues (TFCA)	-	-	672,708	-	-	-	672,708
Other Revenues							
Sublease of Office Space	-	-	-	-	-	-	-
Total Revenues	\$ 93,175,945	\$ 20,561,738	\$ 673,576	\$ 4,834,949	\$ 2,770,723	\$ 5,906,848	\$ 127,923,779



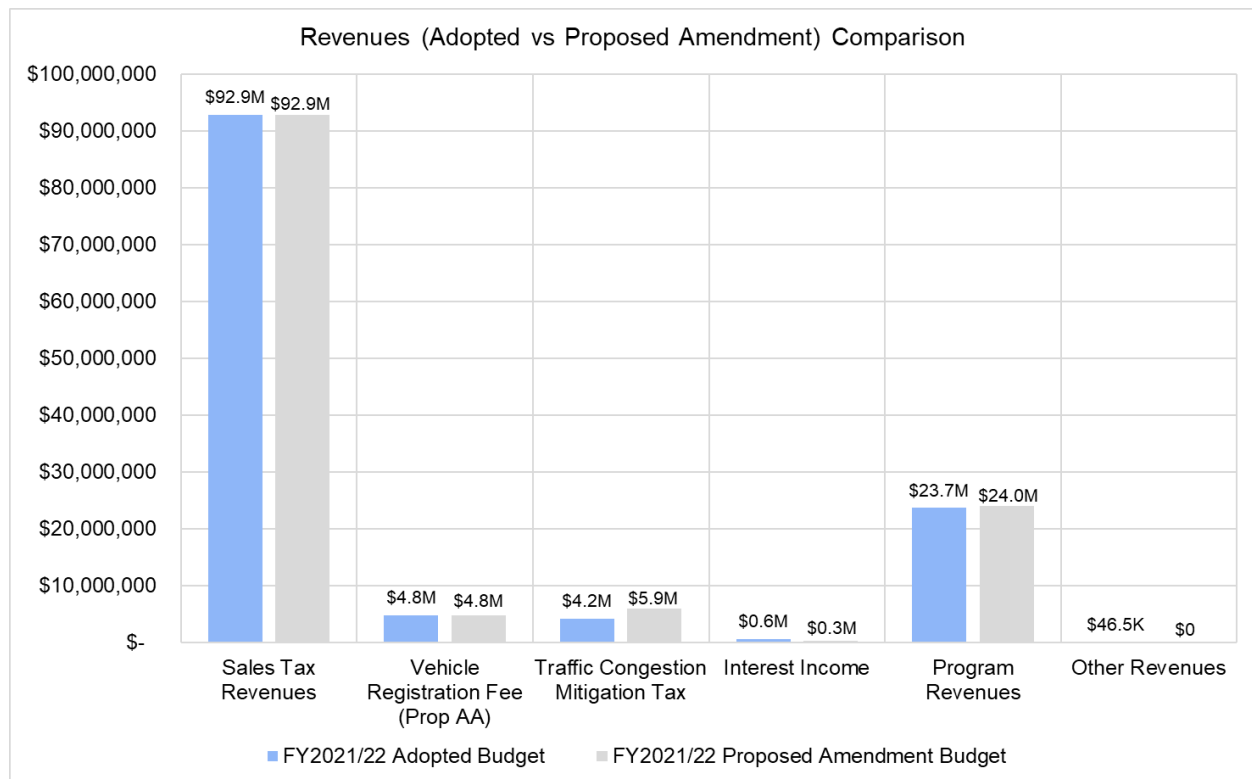
Attachment 3
Proposed Fiscal Year 2021/22 Budget Amendment
Line Item Detail

	Proposed Budget Amendment by Fund						Proposed Fiscal Year 2021/22 Budget Amendment
	Sales Tax Program	Congestion Management Agency Programs	Transportation Fund for Clean Air Program	Vehicle Registration Fee for Transportation Improvements Program	Treasure Island Mobility Management Agency Program	Traffic Congestion Mitigation Tax Program	
Expenditures:							
Capital Project Costs							
Individual Project Grants, Programs & Initiatives	\$ 134,500,000	\$ -	\$ 1,060,567	\$ 8,953,445	\$ -	\$ 1,700,000	\$ 146,214,012
Technical Professional Services	2,087,261	28,500,946	-	-	1,821,094	-	32,409,301
Administrative Operating Costs							
Personnel Expenditures							
Salaries	2,730,685	2,404,141	28,664	164,782	529,644	116,853	5,974,769
Fringe Benefits	1,274,684	1,122,253	13,380	76,920	247,238	54,547	2,789,022
Pay for Performance	233,993	-	-	-	-	-	233,993
Non-personnel Expenditures							
Administrative Operations	2,720,336	68,688	-	-	231,946	5,000	3,025,970
Equipment, Furniture & Fixtures	215,000	-	-	-	-	-	215,000
Commissioner-Related Expenses	60,000	-	-	-	6,200	-	66,200
Debt Service Costs							
Fiscal Charges	207,000	-	-	-	-	-	207,000
Interest Expenses	7,805,350	-	-	-	-	-	7,805,350
Bond Principal Payment	13,710,000	-	-	-	-	-	13,710,000
Total Expenditures	\$ 165,544,309	\$ 32,096,028	\$ 1,102,611	\$ 9,195,147	\$ 2,836,122	\$ 1,876,400	\$ 212,650,617
Other Financing Sources (Uses):							
Transfers in - Prop K Match to Grant Funding	-	11,534,290	-	-	65,399	-	11,599,689
Transfers out - Prop K Match to Grant Funding	(11,599,689)	-	-	-	-	-	(11,599,689)
Draw on Revolving Credit Agreement	50,000,000	-	-	-	-	-	50,000,000
Total Other Financing Sources (Uses)	38,400,311	11,534,290	-	-	65,399	-	50,000,000
Net change in Fund Balance	\$ (33,968,053)	\$ -	\$ (429,035)	\$ (4,360,198)	\$ -	\$ 4,030,448	\$ (34,726,838)
Budgetary Fund Balance, as of July 1	\$ 59,972,084	\$ -	\$ 777,219	\$ 14,834,640	\$ -	\$ 5,377,923	\$ 80,961,866
Budgetary Fund Balance, as of June 30	\$ 26,004,031	\$ -	\$ 348,184	\$ 10,474,442	\$ -	\$ 9,408,371	\$ 46,235,028
Fund Reserved for Program and Operating Contingency	\$ 9,287,980	\$ -	\$ 67,271	\$ 483,405	\$ -	\$ 588,000	\$ 10,426,656

Attachment 4
Fiscal Year 2021/22 Budget Amendment Explanations

TOTAL REVENUES		
Adopted Budget	Proposed Budget Amendment	Variance
\$126,268,136	\$127,923,779	\$1,655,643

The following chart shows the comparative composition of revenues for the proposed amended and adopted Fiscal Year (FY) 2021/22 budget.



Traffic Congestion Mitigation Tax (TNC Tax) Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$4,199,300	\$5,880,000	\$1,680,700

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

Attachment 4

Fiscal Year 2021/22 Budget Amendment Explanations

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 increase by \$1.7 million, or 40%, in FY 2021/22 as compared to the adopted budget. This is due to relaxation of COVID pandemic protocols and increased mobility and activity. TNC Tax revenues are aligned with the City's Controller's Office estimates for economic recovery.

Interest Income		
Adopted Budget	Proposed Budget Amendment	Variance
\$633,670	\$324,761	\$(308,909)

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 volume and timing of 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 \$308,909, or 48.7%, for FY 2021/22. Our adopted budget anticipated a drawdown of \$100 million from the Revolving Credit Agreement during the middle of this fiscal year in which interest would have been collected from the increased cash balance in the Pool. However, based on updated capital expenditure projections from project sponsors, we anticipate a drawdown of \$50 million towards the end of the fiscal year. Also, interest rates have declined from 0.6% assumed in the adopted budget to 0.5% over the past eight months in the Pool.

Federal Program Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$8,629,623	\$10,290,316	\$1,660,693

Federal Program Revenues are expected to increase by \$1.7 million, or 19.2%, as compared to the adopted budget. This is primarily due to an increase of \$1.5 million in federal Highway Bridge Program funding for the Southgate Road Realignment Improvements Project (Southgate), or Phase 2 of the Interstate-80/Yerba Buena Island Interchange Improvement Project, and Yerba Buena Bridge Structures (YBI Projects) with construction activities underway for the Southgate project. The construction is expected to be completed by June 2022 with some closeout costs in the following year. Revenue estimates are also updated to reflect additional funding of \$180,000 for the federal Surface Transportation Program through the Safe & Seamless Quick-Strike Program.

Attachment 4
Fiscal Year 2021/22 Budget Amendment Explanations

State Program Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$3,587,961	\$5,066,932	\$1,478,971

State Program Revenues are expected to increase by \$1.5 million, or 41.2%, as compared to the adopted budget. This is mainly due to an increase of \$757,894 in Seismic Retrofit Proposition 1B funding for the YBI Projects, which provides matching funds to the federal Highway Bridge Program funding as mentioned above. Revenue estimates are also updated to reflect completion of funding from the Affordable Housing and Sustainable Communities for the Southgate project, increasing revenues by \$450,498. Furthermore, new funding of \$366,596 for the first year of activities related to the Hillcrest Road Widening Project through the Infill Infrastructure Grant Program, I-280 Southbound Ocean Avenue Off-Ramp Realignment Project and Yerba Buena Island (YBI) Multi-Use Pathway Project funded by Senate Bill 1 Local Partnership Program are also included in this budget amendment. This increase is also offset by a decrease of \$107,515 in Planning, Programming and Monitoring SB45 Funds which will be deferred to FY 2022/23 for continued project delivery support and oversight activities.

Regional and Other Program Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$11,457,233	\$8,647,921	\$(2,809,312)

Regional and Other Program Revenues are expected to decrease by \$2.8 million, or 24.5%, as compared to the adopted budget. This is mainly due to a \$1.5 million reduction of regional revenue from the Bay Area Toll Authority for work related to the Southgate project that is federal and state reimbursable. In addition, \$1.2 million of funding from the Bay Area Toll Authority for the Torpedo Building Rehabilitation work of the Southgate project in FY 2021/22 has been deferred to the next fiscal year due to a shift in schedule. The revised schedule shows design services now to be completed in the third quarter of FY 2022/23 with construction to be completed in Fall/Winter 2023. Also, \$204,231 of regional revenues from the Bay Area Toll Authority has been deferred to the next fiscal year for the new YBI Landing and Public Pier (Pier E2). 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 it may not be opened to the public until April 2022, and at that time, it is planned to only be open on weekends until late May or early June 2022 when it will be fully opened. This decrease is also offset by \$58,064 in new and increased funding for travel demand model services provided to the City agencies in support of various projects.

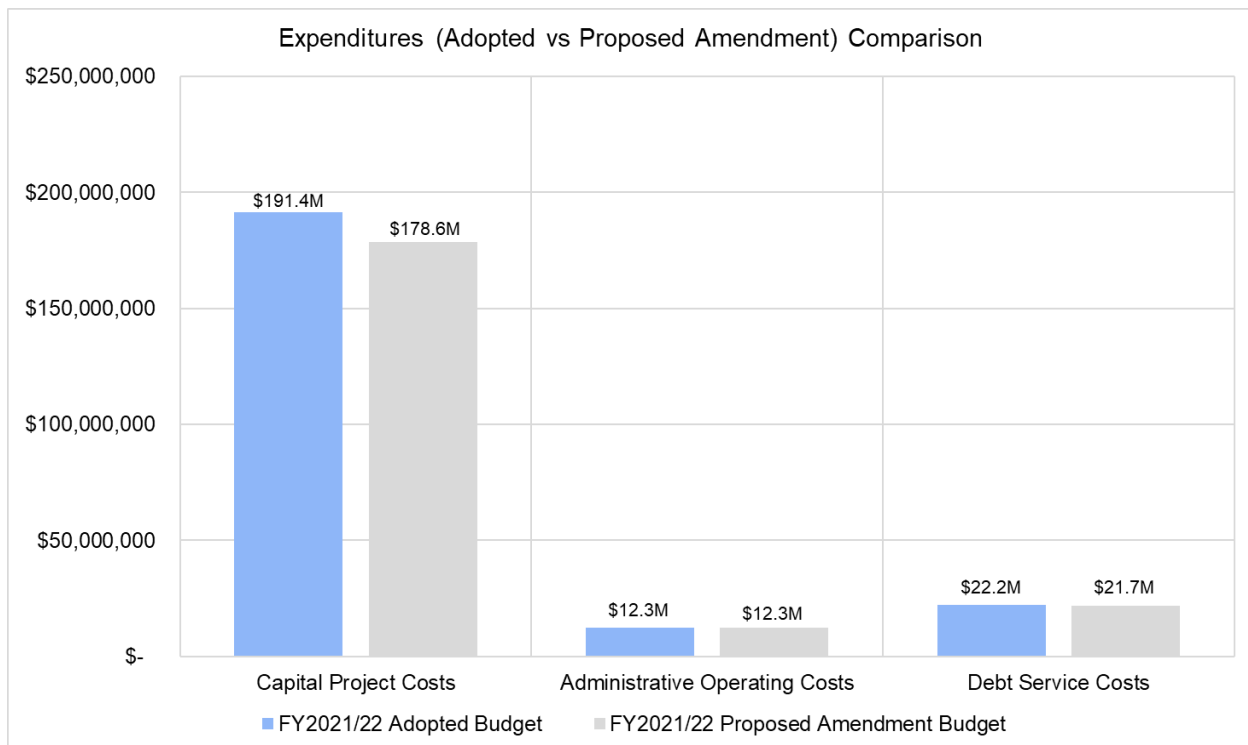
Attachment 4
Fiscal Year 2021/22 Budget Amendment Explanations

Other Revenues		
Adopted Budget	Proposed Budget Amendment	Variance
\$46,500	\$0	\$(46,500)

Other Revenues are expected to decrease by \$46,500, or 100%, as compared to the adopted budget. In FY 2021/22, we are no longer subleasing our office space.

TOTAL EXPENDITURES		
Adopted Budget	Proposed Budget Amendment	Variance
\$225,959,848	\$212,650,617	\$(13,309,231)

The following chart shows the comparative composition of expenditures for the proposed amended and adopted FY 2021/22 budget.



Attachment 4
Fiscal Year 2021/22 Budget Amendment Explanations

Capital Project Costs		
Adopted Budget	Proposed Budget Amendment	Variance
\$191,441,807	\$178,623,313	\$(12,818,494)

Capital Project Costs in FY 2021/22 are budgeted to decrease from the adopted FY 2021/22 budget by \$12.8 million, or 6.7%, which is primarily due to anticipated higher capital costs from the CMA program, as well as lower capital costs from the Sales Tax, TFCA, Prop AA, TNC Tax programs. Costs by Program Fund are detailed below.

Capital Project Costs - Sales Tax Program		
Adopted Budget	Proposed Budget Amendment	Variance
\$150,674,687	\$136,587,261	\$(14,087,426)

Capital Project Costs for the Sales Tax Program in FY 2021/22 are budgeted to decrease by \$14.1 million, or 9.3%, as compared to the adopted budget. This is primarily based on the cash flow amendments approved in Fall 2021 as part of the process to update the Prop K Strategic Plan. The main drivers of reductions in Capital Project Costs, totaling \$15.5 million, include reductions associated with the Breda Light Rail Vehicle Heating, Ventilation, and Air Conditioning Refurbishments; 16th Street Transit Enhancements Phase 2; 6th Street Pedestrian Safety; Caltrain Electrification; Upper Market Street Safety Improvements; and Radio Communications System & CAD Replacement. Additionally, this amended budget includes a partial de-obligation of funds for the Geary Bus Rapid Transit - Phase 2 design.

Also, in July 2021, through Resolution 22-04, the Board approved a Prop K appropriation of \$180,000 for the Capital Project Delivery Best Practices effort, all of which is included in this proposed FY 2021/22 budget amendment. This effort is intended to review current city experience/lessons learned and industry best practices for large scale/complex capital project delivery, oversight, and management to improve overall project delivery performance of transportation capital projects. In December 2021, through Resolution 22-20, the Board approved a Prop K appropriation of \$3.5 million for Downtown Rail Extension program oversight and technical support for the Federal Transit Administration project development process and for the 4th and King Railyards Preliminary Business Case process. Also in December 2021, through Resolution 22-17, the Board approved a Prop K appropriation of \$275,000 for the District 7 Ocean Avenue Mobility Action Plan project to prioritize and identify funding for previously identified transportation improvements, as well as new ideas to address the corridor's key mobility issues. Lastly, there is an appropriation request pending before the Board for the Muni Metro Core Capacity Study - Project Support and Technical Oversight. These new efforts will increase Sales Tax Program Capital Projects Costs by \$764,188 in this fiscal year. The decrease in Sales Tax Program Capital Project Costs is also offset by \$469,904 related to Downtown Extension Rail Program Oversight and Project Development Support that was deferred from FY 2020/21 to FY 2021/22.

Attachment 4
Fiscal Year 2021/22 Budget Amendment Explanations

Capital Project Costs - Congestion Management Agency (CMA) Programs		
Adopted Budget	Proposed Budget Amendment	Variance
\$22,422,367	\$28,500,946	\$6,078,579

Capital Project Costs for CMA Programs in FY 2021/22 are budgeted to increase by \$6.1 million, or 27.1%, as compared to the adopted budget. This increase is mainly due to approximately \$6.4 million of construction activities related to the Southgate project that was deferred from FY 2020/21. The construction is on schedule and expected to be completed by June 2022 with some closeout costs in the following year. In addition, \$155,248 of transportation planning and outreach consultant services related to the San Francisco Transportation Plan was also deferred from FY 2020/21 to FY 2021/22. We also have increased and initiated new efforts during the year, including Golden Gate Park Equity Study, I-280 Northbound Geneva Avenue Off-Ramp Modification Feasibility Study, and District 6 Treasure Island Supplemental Transportation Study projects, which are funded by Prop K appropriations and increase CMA Capital Project Costs by \$273,550. In addition, we anticipate an increase of \$100,000 of CMA Capital Project Costs for the YBI Multi-Use Path project which would be funded by the Priority Conservation Area Program and Senate Bill 1 Local Partnership Program and \$150,000 for the YBI Hillcrest Road Widening Design project which would be funded by the Infill Infrastructure Grant Program.

This increase is also offset by a decrease of \$1.0 million in Capital Project Costs for the Torpedo Building Rehabilitation work of the Southgate project in FY 2021/22 has been deferred to the next fiscal year due to a shift in schedule as mentioned above.

Capital Project Costs - TFCA Program		
Adopted Budget	Proposed Budget Amendment	Variance
\$1,385,939	\$1,060,567	\$(325,372)

Capital Project Costs for the TFCA Program in FY 2021/22 are expected to decrease by \$325,372, or 23.5%, as compared to the adopted budget. The TFCA capital project costs include new FY 2021/22 projects that were approved by the Board in June 2021, carryover prior year projects with multi-year schedules and other projects that were not completed as anticipated in FY 2020/21. For FY 2021/22, we expect to see a decrease due to lower than expected expenditure for new projects that were approved in 2021, a higher share of spending in FY 2020/21 by SFMTA's Short-Term Bike Parking project, and slower than anticipated expenditures for an electric vehicle charger project that is delayed due to EVgo, the project sponsor, not being able to reach an agreement to implement chargers at the San Francisco Museum of Modern Art. A substitute charger location is being identified by EVgo.

Attachment 4
Fiscal Year 2021/22 Budget Amendment Explanations

Capital Project Costs - Prop AA Program		
Adopted Budget	Proposed Budget Amendment	Variance
\$11,162,165	\$8,953,445	\$(2,208,720)

Capital Project Costs for the Prop AA Program in FY 2021/22 are expected to decrease by \$2,208,720, or 19.8%, as compared to the adopted budget. The Prop AA capital project costs include FY 2021/22 projects programmed in the Prop AA Strategic Plan as amended in June 2020, carryover prior-year projects with multi-year schedules, and projects that were not completed as anticipated by the end of FY 2020/21. The largest capital project expenditures include San Francisco Public Works' (SFPW) Western Addition Pedestrian Lighting, Geary Boulevard Pavement Renovation, Richmond Residential Streets Pavement Renovation, and 23rd Street, Dolores Street, York Street, Hampshire Street Pavement Renovation projects, and SFMTA's Muni Metro Station Enhancements Phase 1 and L-Taraval Transit Enhancements (Segment B) project, which together account for more than 70% of the FY 2021/22 budget amount.

We expect to see a decrease in capital cost expenditures primarily due to the four SFPW projects and two SFMTA projects, noted above, that were delayed and are not expected to incur or request reimbursements in FY 2021/22 as we had initially anticipated. This effect is partially offset by a significant increase in anticipated expenditures for the Muni Metro Station Enhancements Phase 1 project, which is anticipated to be open for use by June 2022.

Capital Project Costs - TNC Tax Program		
Adopted Budget	Proposed Budget Amendment	Variance
\$4,005,686	\$1,700,000	\$(2,305,686)

Capital Project Costs for the TNC Tax Program in FY 2021/22 are expected to decrease by \$2.3 million, or 57.6%, as compared to the adopted budget. The funds have been allocated to SFMTA's Vision Zero Quick-Build Program and while the projects are progressing on-time, SFMTA has been billing to other local fund sources, including Prop B General Funds and Prop K, for early planning work and outreach.

Administrative Operating Costs - Non-Personnel Expenditures		
Adopted Budget	Proposed Budget Amendment	Variance
\$3,098,252	\$3,307,170	\$208,918

Attachment 4
Fiscal Year 2021/22 Budget Amendment Explanations

Non-Personnel Expenditures in FY 2021/22 are expected to increase by \$208,918, or 6.7%, as compared to the adopted budget. This increase is primarily due to increased project-related legal costs as well as increased costs related to computer network system upgrades.

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

The estimated level of sales tax capital expenditures for FY 2021/22 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 partially due to a higher ending fund balance in FY 2020/21 and Sales Tax Program capital expenditures coming in \$14.1 million lower than anticipated in FY 2021/22. 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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San Francisco
County Transportation
Authority



SFMTA

Subway Renewal Overview

San Francisco County Transportation Authority
March 22, 2022 Board Meeting

Eastbound to ↑
Embarcadero, 🚶



OCEAN VIEW
EMBARCADERO

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2061A

EMBARCADERO

35

SIEMENS

Vision for Modernizing Muni Metro

We envision a Muni Metro System that ...



is the best option for citywide trips

- Supports city's climate and environmental goals
- Improves access and meets transportation related quality of life needs
- Supports city's Vision Zero goals

is free from delays

- Street traffic
- Subway congestion

is frequent and reliable

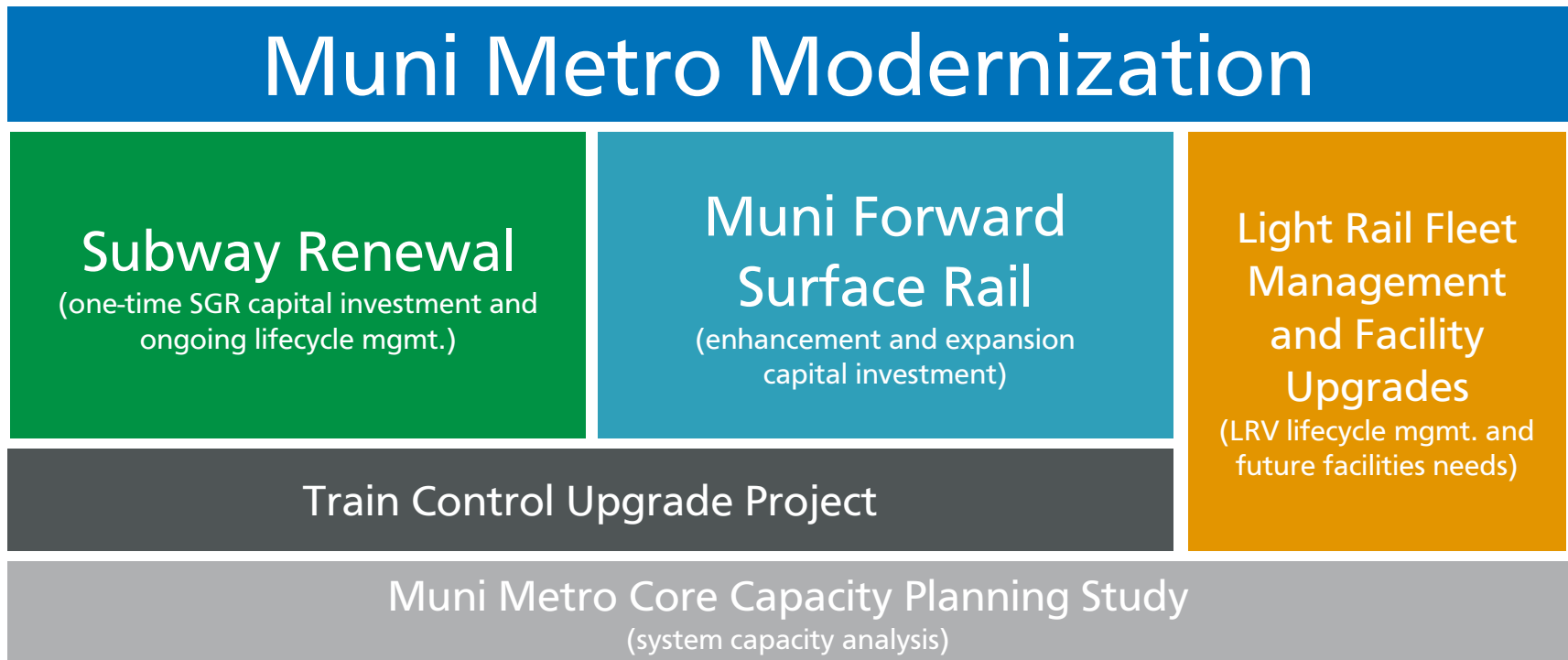
- High frequency of service
- Minimal wait times
- Predictable and smooth transfers

is safe and accessible for all

- Personal and transportation safety
- Accessible for people with mobility disabilities

Muni Metro Modernization

The Subway Renewal is one pillar of SFMTA's overall vision for delivering a modernized Muni Metro system.



Together, these improvements will enable us to meet the transit needs of San Francisco and ensure we deliver first-class rail service for our customers.



Subway Renewal

10-year capital investment strategy for the Subway

Muni Metro Subway is...

the City's greatest transit-dedicated asset – it is the “backbone” of our light rail system.

The Muni Metro Subway provides critical transit service connecting

- SF neighborhoods with each other and with downtown,
- SF residents to the greater region through connections to BART, Caltrain and future regional expansions, and
- the region to San Francisco neighborhood businesses, attractions, family and friends.



Frequent and reliable Muni Metro is integral to San Francisco's transit future.

Challenges Faced

For decades Muni Metro has been pushed to its limits.

The Subway was built in the 1970s, and as a result:

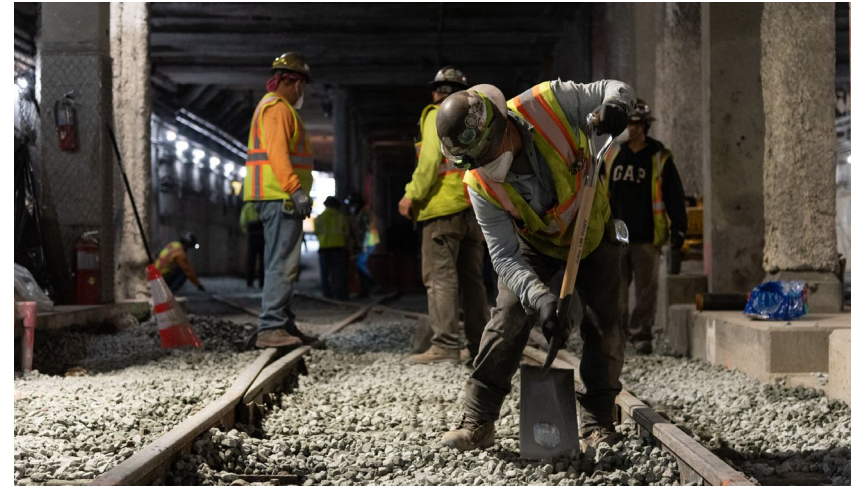
- crowding and delays due to failures of critical, aging infrastructure like track or overhead lines, and unresponsive train control plague the system.
- while significant investment has been made in the subway, many systems are original. Our backlog of capital work persists and out paces available funding.



Subway issues impact **every Muni Metro rider**, no matter where they travel.

Our outstanding Maintenance of Way staff is essential to quality Muni Metro service

- Keeping Muni Metro running requires both
 - regular day-to-day maintenance of transit critical infrastructure and
 - strategic capital replacement and upgrade campaigns
- Maintenance costs and complexity increases overtime if capital assets are not replaced
- SFMTA committed to quarterly extended maintenance program in the subway to address projects that require longer maintenance window –
Planned next for April 14-24





Subway Renewal: Vision

Muni's vision for the Metro system is a **frequent, dependable** light rail service for our customers. Riders will experience **short, uninterrupted trips** because the system will be **free from congestion and delays** caused by system failures. Critical infrastructure that keeps the system moving will be **state-of-the-art** and routine maintenance will ensure the system is kept in a **state of good repair**. Modern stations, customer information and amenities will attract riders, provide equitable access and increase **comfort and safety** at all stages of our customers' journey. As San Francisco grows, the system will be equipped to meet future demands and deliver **first-class service**.

Subway Renewal will be guided by implementation principles rooted in delivery and customer experience.

1. **Lifecycle Management:** Commit to a lifecycle management approach that results in timely assessment, repair and replacement of service critical assets and keeps the subway in a continual state of good repair.
2. **Customer Experience:** Integrate delivery of improvements to customer-facing amenities with improvements to service critical assets to build public support and foster trust.
3. **Resilient and Redundant:** Build a more resilient subway that addresses known vulnerabilities, builds in redundancy and responds to security and environmental threats.
4. **Project Delivery:** Pair ongoing incremental delivery with strategically planned shutdowns that maximize progress per construction window.
5. **Adaptive System:** Create a more flexible and adaptive system to support existing riders and prepare for potential growth

Over the next ten years, investment in key systems will be critical to realize a subway that meets the needs of SF and the region.



Total Need	\$ 1,715M
Program and Project Planning	\$ 23M
Train Control Upgrades	\$ 609M
Track Replacement & Wayside Equipment	\$ 235M
Traction Power Upgrades	\$ 499M
Tunnel Safety, Security & Resiliency	\$ 46M
Stations & Passenger Comfort	\$ 303M

Capital Investment Areas

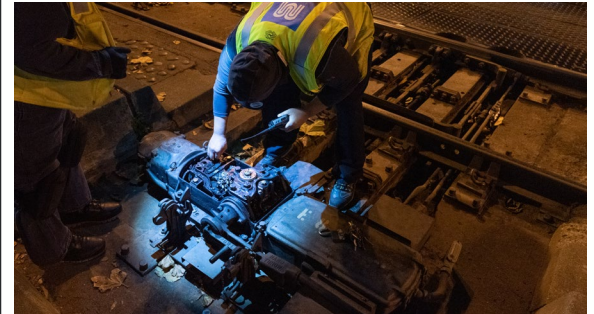
Train Control Upgrades (\$609M)

- Upgrade 20+ year old system to state-of-the-art communication-based train control via the Train Control Upgrade Project
- Implement near-term SGR improvements on existing system



Track Replacement and Repair (\$235M)

- Assess condition of critical components of the track system and replace aging infrastructure (e.g. straight/curve track, track support structures, switch machines and switches)
- Establish trackway debris removal program



Traction Power Upgrades (\$499M)

- Replace critical power delivery feeders and upgrade substations to prepare for added capacity
- Study feasibility and plan for future implementation of new OCS technology



Capital Investment Areas (Contd.)

Tunnel Safety, Security and Resiliency (\$46M)

- Completed Tunnel inspection and remediation work
- Replace lighting, portal intrusion and safety systems like fire suppression
- Coordinate with Port-led resiliency work and implement mitigation measures



Station Enhancements, Passenger Comfort (\$303M)

- Assess condition of all station systems (electrical, HVAC, agent booths, interiors etc.)
- Deliver incremental refresh of customer-facing spaces
- Upgrade platform customer information signage and wayfinding



Delivering Subway Renewal Improvements will help to...

Improve

- safety and reliability
- asset condition/SGR
- wayfinding, access and comfort

Increase

- operational efficiency/flexibility
- capacity
- resiliency/redundancy

Reduce

- equipment/system failures
- service disruptions
- crowding
- maintenance needs



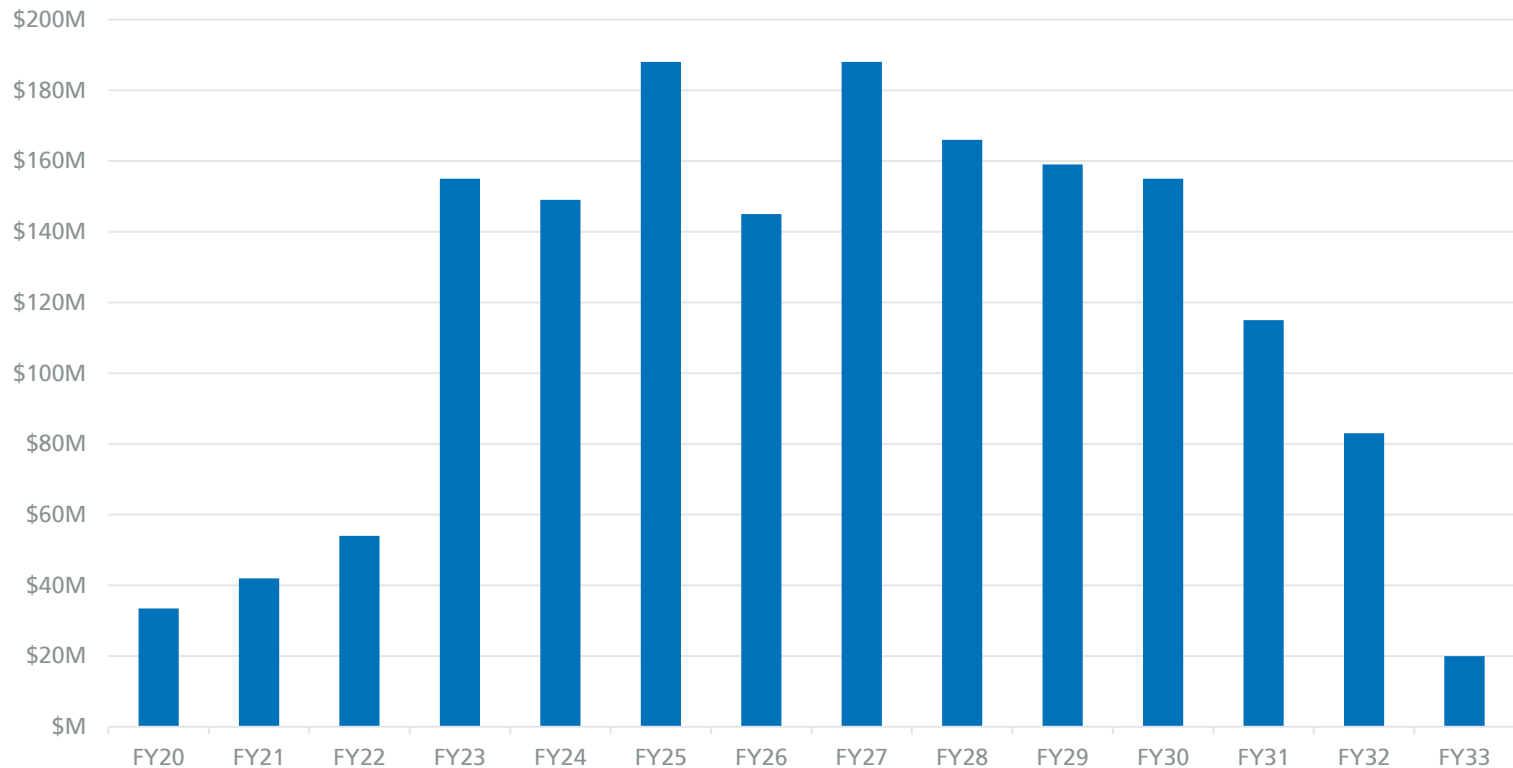
Implementation Challenges

- Funding will be our greatest barrier (only partially funded in CIP)
- Project delivery – proactively addressing scope, schedule and budget challenges
- Accurately identifying interdependencies and incorporating into the sequencing of work
- Balancing need to minimize customer inconvenience while also establishing efficient work windows



A significant ramp up in funding is required to deliver this program effectively

Subway Renewal Program: Estimated Annual Cost



Next Steps

- Detail a comprehensive implementation strategy
 - Program Management Approach
 - Community Engagement Strategy
 - Contracting and Construction Delivery
 - Funding Strategy
- Implement incremental improvements that can be delivered with internal staff and existing contracts
- Complete a series of studies to guide key investment categories
 - Facilities Condition Assessment
 - Rigid Traction Power Feasibility
 - Signal Interlocking Standardization
- Issue RFP for Train Control Project



A large group of construction workers, approximately 30-40 people, are posed for a group photo inside a large, dimly lit tunnel. They are wearing hard hats, safety vests (yellow and orange), and face masks. The tunnel has concrete pillars and a gravel floor with tracks. The lighting is focused on the group, with the background receding into the distance.

Thank you.

Julie Kirschbaum, Director of Transit
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