

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2022/23
Project Name:	District 4 Microtransit Business Plan [NTIP Planning]
Grant Recipient:	San Francisco County Transportation Authority

EXPENDITURE PLAN INFORMATION

PROP K Expenditure Plans	Transportation Demand Mgmt
Current PROP K Request:	\$310,000
Supervisorial District	District 04

REQUEST

Brief Project Description

The District 4 Mobility Study identified a community shuttle as a priority. The Study found low levels of transit use for trips within the District 4 (4%) compared to trips that start within District 4 and end outside the district (10%). This planning phase Business Plan, requested by Commissioner Mar, will define an on-demand microtransit shuttle service within District 4 by identifying potential service models and establishing the operating requirements of a successful service. This phase also includes outlining the operating phase cost and funding strategy.

Detailed Scope, Project Benefits and Community Outreach

Please see attached word document.

Project Location

District 4 (the Sunset)

Project Phase(s)

Planning/Conceptual Engineering (PLAN)

5YPP/STRATEGIC PLAN INFORMATION

Type of Project in the Prop K 5YPP/Prop AA Strategic Plan?	Project Drawn from Placeholder
Is requested amount greater than the amount programmed in the relevant 5YPP or Strategic Plan?	Less than or Equal to Programmed Amount
Prop K 5YPP Amount:	\$310,000

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ENVIRONMENTAL CLEARANCE

Environmental Type:	Categorically Exempt
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PROJECT DELIVERY MILESTONES

Phase	Start		End	
	Quarter	Calendar Year	Quarter	Calendar Year
Planning/Conceptual Engineering (PLAN)	Jul-Aug-Sep	2022	Jul-Aug-Sep	2023
Environmental Studies (PA&ED)				
Right of Way				
Design Engineering (PS&E)				
Advertise Construction				
Start Construction (e.g. Award Contract)				
Operations (OP)				
Open for Use				
Project Completion (means last eligible expenditure)				

SCHEDULE DETAILS

COMMUNITY OUTREACH

Oct - Nov 2022: Round 1 Outreach for Tasks 1-3 (Lessons Learned, Ridership, Operating Models)

Apr - May 2023: Round 2 Outreach for Tasks 5-6 (Mobility Solutions Development)

START/END DATES BY TASK

Task 1, Lessons Learned: Sept 2022

Task 2, Estimate Ridership: Oct 2022

Task 3, Operating Models: Oct 2022

Task 4, Outreach: Oct-Nov 2022; Apr-May 2023

Task 5, Service Parameters: Dec 2022 - Mar 2023

Task 6, Establish Business Plan: Apr 2023 - Jul 2023

Task 7, Agency Coordination: Ongoing

District 4 Microtransit Business Plan [NTIP Planning]

Project Purpose

A community shuttle is identified as a priority in the District 4 Mobility Study, led by the Transportation Authority and completed in 2021. The study found that there are about 17,000 drive alone trips within the district on an average weekday. It also found low levels of transit use for trips within the district (4%) compared to trips that start within District 4 and end outside the district (10%).

The potential benefits of an on-demand microtransit (shuttle) service include:

- Reduced vehicle trips
- Reduced vehicle mode share
- Shorter transit journey times, including shorter first/last mile and/or transit access times
- Reduced transit cost per passenger trip

This planning phase Business Plan will define an on-demand microtransit shuttle service within D4 by identifying potential service models and establishing the operating requirements of a successful service. This phase also includes outlining the operating phase cost and funding strategy.

This Business Plan will set up a subsequent pilot implementation of on-demand microtransit operations. Following a successful pilot, the service is envisioned to expand to meet longer-distance travel needs for District 4 residents and visitors with connections to surrounding neighborhoods with high travel demand (e.g. the Outer Richmond and Inner Sunset).

The budget shown differentiates the project cost and funding concept for the current Business Plan phase vs. future pilot operations (either a 3 or 6 month operating window). Please note that the operations cost estimate would be refined through the current planning phase and will be based on the critical variables of potential ridership, fare policy, service parameters, and operating entity.

The Transportation Authority's Neighborhood Transportation Improvement Program (NTIP) is intended to strengthen project pipelines and advance the delivery of community supported neighborhood-scale projects, especially in Communities of Concern and other neighborhoods with high unmet needs.

Scope of Work

1. Identify Lessons Learned from Past & Current Microtransit Services

- a. Bayview Shopper Shuttle (past)
- b. Bayview MOVES (past)
- c. SFMTA Van Gogh program, and its recent expansion to serve Golden Gate Park (current)
- d. CARB-funded Bayview Shuttle pilot (current)
- e. Treasure Island AV Shuttle Pilot and planned east bay bus service (current)

- f. Microtransit services in other CA cities: AC Transit (Oakland and Fremont), Emeryville, Los Angeles/LA Metro, Sacramento, San Jose (past/current)

Deliverables: Memorandum summarizing lessons learned from past/current microtransit services

2. Estimate Ridership and General Service Area

- a. Travel analysis (Origin-Destination Study) for trips within D4. Build on the travel analysis completed for the D4 Mobility Study to establish the general service area for microtransit operations. Likely areas include neighborhood residential, commercial corridors (e.g., Irving, Taraval, Sunset), and other major destinations. The study may also consider corridors or neighborhoods that provide connections to/from transit between District 4 and other neighborhoods.
- b. Estimate Ridership based on the travel analysis completed for the D4 Mobility Study to estimate ridership by day of week and time of day.

Deliverables: Excel worksheet summarizing trip tables

3. Scan Service/Operating Models

- a. Industry Sounding. In coordination with existing shuttle / microtransit pilots underway in the Bayview and on Treasure Island, conduct an industry Request for Information (RFI) process to understand the universe of potential service / operating models. Evaluate service options for cost and feasibility (with a preference for those that do not require contracted operators).
 - i. SFMTA Muni
 - ii. Third party (e.g., Paratransit, Van Gogh, or Bayview Shuttle) contracting model
 - iii. Non-profit led operations (Bayview MOVES)
- b. Identify Key Operating Model Variables. The RFI process will provide insight into options for service type (fully on demand, flex route); operator partnerships (union labor options, third party operator options, labor harmony standards); vehicle types and features (e.g., clean air, bicycle carrying capacity); and more.

Deliverables: RFI; RFI responses; Industry interview summaries; matrix summarizing operating variables.

4. Outreach

- a. Conduct community, visitor, and business outreach at two phases of the business plan development:
 - i. First round to inform the ridership estimates and identify key service plan variables
 - ii. Second round to refine the service options and funding concepts into a recommended service plan and funding strategy.
- b. Outreach will be multi-language and community-based, especially with key community stakeholders who may be instrumental in ensuring a sufficient pilot funding strategy.

Deliverables: Outreach Plan memorandum; Communications materials; Summary of outreach feedback.

5. Evaluate and Determine Service Parameters

- a. Service Area / Routes / Alignments: Options will include standard and technology-based options for fixed route, flex route, and fully on-demand service.
- b. Stop Policies and Locations: Evaluate passenger pickup/drop off policy options. Establish stop criteria (e.g., curb uses/lengths, proximity to Muni stops) and identify possible stop locations.
- c. Span and Frequency of Service: service times, frequencies
- d. Fare Policy and Payment Technology: Determine fare policy and payment options.
- e. Vehicle Specifications: Vehicle type will be considered in this task, including options to provide clean air vehicles and accessible service.

Deliverables: Memorandum summarizing service plan recommendations

6. Establish Business Plan (including funding and evaluation)

- a. Implementation plan: Identify any regulatory requirements. Develop an implementation and launch schedule and timeline of milestones. Develop operations procedures including a publicity and customer service plan.
- b. Capital and collateral requirements: Based on the implementation, publicity, and customer service plans, identify capital needs (e.g., at stop locations, for fare payment) or collateral direct costs (advertising collateral, signage and wayfinding).
- c. Cost Estimates: The estimate provided below is a sketch estimate for a 3 or 6 month operational period based on prior experience. This planning phase will prepare a refined capital and operating cost estimate based on the RFI process and agency collaboration.
- d. Funding/business plan: Identify potential resources to support implementation and operations. Both direct costs (collateral, fare payment media, advertisements) and operating costs require creative funding strategies. Potential sources for a permanent, ongoing microtransit service include:
 - i. Fare policy
 - ii. SFMTA operating budget (e.g., repurposing existing 66 line operating funds)
 - iii. Community partnerships, such as a Green Benefit District or Parking Benefit District
 - iv. Advertising
- e. Evaluation Plan: Develop a data collection and monitoring plan to evaluate the initial operations/pilot.

Deliverables: Memorandum summarizing business plan; excel worksheet with unit cost estimate(s).

7. Agency Coordination

- a. SFMTA: Ongoing involvement from SFMTA throughout including service design, outreach, implementation, and funding strategy.
- b. OEWD: Partnerships and collaboration with OEWD's workforce development programs, e.g., CityDrive.

Deliverables: Agency review and comment on Plan deliverables

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FUNDING PLAN - FOR CURRENT REQUEST

Fund Source	Planned	Programmed	Allocated	Project Total
EP-143: Transportation Demand Mgmt	\$0	\$310,000	\$0	\$310,000
Phases In Current Request Total:	\$0	\$310,000	\$0	\$310,000

FUNDING PLAN - ENTIRE PROJECT (ALL PHASES)

Fund Source	Planned	Programmed	Allocated	Project Total
PROP K	\$0	\$310,000	\$0	\$310,000
TBD (e.g. new revenue measure, private sources, General Funds (addback))	\$1,860,000	\$0	\$0	\$1,860,000
Funding Plan for Entire Project Total:	\$1,860,000	\$310,000	\$0	\$2,170,000

COST SUMMARY

Phase	Total Cost	PROP K - Current Request	Source of Cost Estimate
Planning/Conceptual Engineering	\$310,000	\$310,000	prior similar work; staff estimate
Environmental Studies	\$0		
Right of Way	\$0		
Design Engineering	\$0		
Construction	\$0		
Operations	\$1,860,000		TIMMA estimates; SFMTA actuals for similar work
Total:	\$2,170,000	\$310,000	

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

San Francisco County Transportation Authority

Prop K/Prop AA Allocation Request Form

MAJOR LINE ITEM BUDGET

DISTRICT 4 MICROTRANSIT BUSINESS PLAN (NTIP)

BUDGET SUMMARY

Agency	Task 1 - Lessons Learned	Task 2 - Estimate Ridership	Task 3 - Operating Models	Task 4 - Outreach	Task 5 - Define Service Plan	Task 6 - Business Plan	Task 7 - Agency Coordination	Total
SFCTA	\$ 5,000	\$ 25,000	\$ 15,000	\$ 50,000	\$ 15,000	\$ 20,000	\$ 5,000	\$ 135,000
Consultant	\$ 10,000	\$ 5,000	\$ 20,000	\$ 75,000	\$ 20,000	\$ 15,000	\$ 5,000	\$ 150,000
SFMTA							\$ 25,000	\$ 25,000
Total	\$ 15,000	\$ 30,000	\$ 35,000	\$ 125,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 310,000

* Direct Costs include mailing, reproduction costs room rental fees.

San Francisco County Transportation Authority

Prop K/Prop AA Allocation Request Form

DETAILED LABOR COST ESTIMATE - BY AGENCY						
SFCTA	Hours	Base Hourly Rate	Overhead Multiplier	Fully Burdened Hourly Cost	FTE	Total
Deputy Director	80	\$ 102.47	2.69	\$ 275.96	0.03	\$ 22,077
Transportation Planner	400	\$ 53.10	2.69	\$ 143.01	0.15	\$ 57,204
Director of Communications	25	\$ 79.53	2.69	\$ 214.18	0.01	\$ 5,355
Senior Communications Officer	200	\$ 66.27	2.69	\$ 178.49	0.08	\$ 35,698
Senior Graphic Designer	50	\$ 49.05	2.69	\$ 132.10	0.02	\$ 6,605
Senior Transportation Modeler	40	\$ 71.93	2.69	\$ 193.70	0.02	\$ 7,748
Total	705				0.27	\$ 134,686

SFMTA	Hours	Base Hourly Rate	Overhead Multiplier	Fully Burdened Hourly Cost	FTE	Total
Project Manager I	116	\$ 67.26	1.40	\$ 94.27	0.04	\$ 10,935
Transportation Planner III	116	\$ 87.34	1.37	\$ 119.92	0.04	\$ 13,911
Total	232				0.09	\$ 24,846

CONSULTANT	Hours	Base Hourly Rate	Overhead Multiplier	Profit 10%	Fully Burdened Hourly Cost	FTE	Total
Associate Principal	80	\$ 61.06	125.89	\$ 18.70	\$ 206	0.03	\$ 16,452
Senior Associate	365	\$ 40.38	83.26	\$ 12.36	\$ 136	0.14	\$ 49,640
Associate 2	100	\$ 28.75	59.28	\$ 8.80	\$ 97	0.04	\$ 9,683
Associate 3	250	\$ 28.75	59.28	\$ 8.80	\$ 97	0.10	\$ 24,208
Direct Costs (translations, advertisements, materials)							\$ 50,000
Total	795					0.31	\$ 149,983

ESTIMATED COST OF PILOT MICROTRANSIT OPERATIONS, 3 OR 6 MONTHS	
Task	Cost
Permitting, procurement, contracting	\$ 100,000
Technical professional services (monitoring & evaluation)	\$ 250,000
Operations - 3 months	\$ 300,000
Outreach & publicity	\$ 100,000
Direct costs	\$ 500,000
<i>Subtotal</i>	\$ 1,250,000
20% Contingency	\$ 250,000
TOTAL - 3 months operation	\$ 1,500,000
Operations - Additional 3 months	\$ 300,000
20% Contingency	\$ 60,000
TOTAL = 6 months operation	\$ 1,860,000

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SFCTA RECOMMENDATION

Resolution Number:	2022-057	Resolution Date:	6/21/2022
Total PROP K Requested:	\$310,000	Total PROP K Recommended	\$310,000

SGA Project Number:	143-901174	Name:	District 4 Microtransit Business Plan [NTIP Planning]
Sponsor:	San Francisco County Transportation Authority	Expiration Date:	12/31/2023
Phase:	Planning/Conceptual 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-143	\$0	\$250,000	\$60,000	\$0	\$0	\$310,000

Deliverables

1. Quarterly progress reports (QPRs) shall contain a percent complete by task, percent complete of the overall project, a summary of outreach activities performed the quarter prior, and a list of outreach activities planned for the quarter ahead.
2. Upon completion of Task 1, provide a memo summarizing lessons learned from past/current microtransit services.
3. Upon completion of Task 2, provide a worksheet summarizing trip tables.
4. Upon completion of Task 3, provide RFI responses, industry interview summaries, and a matrix summarizing operating variables.
5. Upon completion of Task 4, provide an outreach plan memo and summary of outreach feedback.
6. Upon completion of Task 5, provide a memo summarizing service plan recommendations.
7. Upon completion of Task 6, provide a memo summarizing business plan and a worksheet with unit cost estimates.
8. Upon completion of Task 7, provide a summary of agency comments on the draft plan.
9. Upon completion (anticipated July 2023), staff will present the draft final report, including key findings, recommendations, next steps, implementation, and funding strategy, to the Board for approval.

Notes

1. Quarterly progress reports will be shared with the District Supervisor for this NTIP project.

Metric	PROP K	TNC TAX	PROP AA
Actual Leveraging - Current Request	0.0%	No TNC TAX	No PROP AA
Actual Leveraging - This Project	85.71%	No TNC TAX	No PROP AA

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EXPENDITURE PLAN SUMMARY

Current PROP K Request:	\$310,000
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1) The requested sales tax and/or vehicle registration fee revenues will be used to supplement and under no circumstance replace existing local revenues used for transportation purposes.

Initials of sponsor staff member verifying the above statement:

RH

CONTACT INFORMATION

	Project Manager	Grants Manager
Name:	Rachel Hiatt	Mike Pickford
Title:	Acting Deputy Director	Senior Transportation Planner
Phone:	(415) 522-4809	(415) 522-4822
Email:	rachel.hiatt@sfcta.org	mike.pickford@sfcta.org