San Francisco
County Transportation
Authority

1455 Market Street, 22ND Floor, San Francisco, California 94103 415-522-4800 info@sfcta.org www.sfcta.org

Agenda

SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY
Meeting Notice

DATE:	Tuesday, September 15, 2026, 10:00 a.m.
LOCATION:	Legislative Chamber, Room 250, City Hall
	Watch SF Local Cable Channels 26, 70, 71, 78, or 99 (depending on your provider)
	Watch www.sfgovtv.org
COMMISSIONERS:	Melgar (Chair), Sauter (Vice Chair), Chan, Chen, Dorsey, Fielder, Mahmood, Mandelman, Sherrill, Walton, and Wong
CLERK:	Amy Saeyang

Participation

Members of the public may attend the meeting to observe and provide public comment at the physical meeting location listed above or may watch SF local cable channels 26, 70, 71, 78, or 99 (depending on your provider) or may visit the SFGovTV website (www.sfgovtv.org) to stream the live meeting or may watch them on demand.

Members of the public may comment on the meeting during public comment periods in person.

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 5 p.m. on the day before the meeting will be distributed to Board members before the meeting begins.

1. Roll Call

2. Approve the Minutes of the July 28, 2026 Meeting – **ACTION*** **3**

3. Community Advisory Committee Report **– INFORMATION*** **7**

4. Appoint Abigail Pantoja as the District 11 Representative to the Community Advisory Committee **– ACTION*** **23**

5. State and Federal Legislation Update – **ACTION*** **29**

Position: Support: Federal H.R. 10033 (Mullin (CA-15))

6. Allocate $22,500,000 in Prop L Funds, with Conditions, to the Transbay Joint Powers Authority for The Portal Project Engineering Phase Activities Starting October 1, 2026, and

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Appropriate $3,500,000 in Prop L Funds, with Conditions, for The Portal Project Oversight, Engagement, and Work Program for Initiation of Pre-Construction – **ACTION*** **37**

7. Adopt San Francisco's One Bay Area Grant Cycle 4 Project Nominations – **ACTION*** **101**

Other Items

8. 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.

9. Public Comment

10. 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.

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DRAFT MINUTES

San Francisco County Transportation Authority

Tuesday, July 28, 2026

1. Roll Call

Chair Melgar called the meeting to order at 10:05 a.m.

Present at Roll Call: Commissioners Chen, Dorsey, Melgar, Sauter, Sherrill, and Walton (6)

Absent at Roll Call: Commissioners Chan (entered during Item 12), Fielder (entered during Item 2), Mahmood (entered during Item 2), Mandelman, and Wong (entered during Item 2) (5)

2. Chair's Report – INFORMATION

Chair Melgar reported that the Transportation Authority helped celebrate the completion of the Mission/Geneva Transportation Improvements project, which included safety improvements funded in part by more than $8.6 million from the Transportation Authority's sales tax and Proposition AA vehicle registration fee programs. She stated that local, state, and federal officials responded to traffic congestion and autonomous vehicle (AV) operational challenges following the July 4 fireworks by requesting stronger autonomous vehicle and emergency vehicle coordination standards and new federal legislation addressing AV emergency response. She added that the Transportation Authority looked forward to working with government leaders, public safety partners, and the AV industry to improve coordination and support emergency response as AV technology continued to evolve.

During public comment, Aleta Dupree, Team Folds, stated that transportation and crowd management challenges associated with large events were broader than coordination between autonomous and emergency vehicles and suggested that the city should consider larger-scale transportation solutions, such as expanded subway capacity.

3. Executive Director's Report – INFORMATION

Chair Melgar reported that there would be no verbal presentation of the Executive Director's Report which was posted on the Transportation Authority website, since Director Tilly Chang was representing the Transportation Authority at a press conference where Representative Kevin Mullin would announce the AV Emergency Response Coordination Act and added that she looked forward to receiving an update on the act at the next Board meeting.

There was no public comment.

4. Approve the Minutes of the July 14, 2026 Meeting – ACTION

There was no public comment.

Commissioner Walton moved to approve the minutes, seconded by Vice Chair Sauter.

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The minutes were approved without objection by the following vote:

Ayes: Commissioners Chen, Dorsey, Fielder, Mahmood, Melgar, Sauter, Sherrill, Walton, and Wong (9)

Absent: Commissioners Chan and Mandelman (2)

Consent Agenda

5. [Final Approval] State and Federal Legislation Update – ACTION

Positions: Support and Seek Amendments: Senate Bill 1246 (Cortese)

6. [Final Approval] Allocate $3,055,000 and Appropriate $125,000 in Prop L Funds, with Conditions, for Six Requests — ACTION

Projects: Prop L: SFPW: Street Repair and Cleaning Equipment ($300,000), Public Sidewalk and Curb Repair ($768,000), Curb Ramps ($1,212,000), Visitacion Avenue Bike and Pedestrian Safety Improvements ($250,000). SFMTA: Safe Streets Evaluation Program ($400,000). Multi-Sponsor: Neighborhood Transportation Program Coordination (SFCTA $125,000, SFMTA $125,000).

7. [Final Approval] Approve the Fiscal Year 2026/27 Transportation Fund for Clean Air Program of Projects, Totaling $2,496,917, with Conditions – ACTION

8. [Final Approval] Amend the Prop K Standard Grant Agreements for the Visitacion Valley & Portola Community Based Transportation Plan (Plan) Implementation [NTIP Capital] to Update the Scope, Schedule, Cost, and Funding Plan; and Release $435,000 on Reserve to Implement Plan Recommendations – ACTION

9. [Final Approval] Adopt the Laguna Honda Gondola Feasibility Study Final Report – ACTION

10. [Final Approval] Award a Three-Year Professional Services Contract with an Option to Extend for Two Additional One-Year Periods, to Crowe LLP in an Amount Not to Exceed $340,000 for Annual Audit Services – ACTION

11. [Final Approval] Ratify Debt, Investment, and Procurement Policies – ACTION

There was no public comment.

Commissioner Walton moved to approve the Consent Agenda, seconded by Commissioner Fielder.

The Consent Agenda was approved without objection by the following vote:

Ayes: Commissioners Chen, Dorsey, Fielder, Mahmood, Melgar, Sauter, Sherrill, Walton, and Wong (9)

Absent: Commissioners Chan and Mandelman (2)

End of Consent Agenda

12. Caltrain Financial Outlook – INFORMATION

Martin Reyes, Principal Transportation Planner, Government Affairs, presented an update on the transit fiscal cliff.

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Michelle Bouchard, Executive Director at Caltrain, provided introductory remarks for the Caltrain Financial Outlook presentation and Devon Ryan, Government and Community Affairs Manager at Caltrain, presented the item.

Chair Melgar acknowledged Commissioner Walton's years of service on the Caltrain Board representing San Francisco.

Commissioner Walton stated that Caltrain was important to the region and that passage of the November ballot measures was necessary to avoid service reductions, fare increases, and downsizing. He said that significant work went into the electrification of Caltrain services and that increased revenue was needed to sustain those investments and support continued growth. He thanked Caltrain staff for their work before and during the pandemic.

Chair Melgar asked whether, in addition to cost reductions, Caltrain was exploring other revenue sources such as fare increases or development opportunities.

Ms. Bouchard stated that Caltrain was evaluating and pursuing opportunities such as charter trains, naming rights, development opportunities, and leveraging private investment. She explained that these efforts would diversify revenue but would not fully close the projected funding shortfalls. She added that Caltrain was reducing its reliance on fare revenue to lessen the impact of sudden declines in ridership.

During public comment, Aleta Dupree, Team Folds, stated that Caltrain had national and international significance and described her experiences using transit. She added that the Bay Area depended on Caltrain and that Caltrain should not be allowed to decline.

13. Investment Report and Debt Expenditure Report for the Quarter Ended June 30, 2026 – INFORMATION

Cynthia Fong, Deputy Director for Finance & Administration, presented the item per the staff memorandum.

There was no public comment.

Other Items

14. Introduction of New Items – INFORMATION

There were no new items introduced.

15. Public Comment

During public comment, Aleta Dupree, Team Folds, stated that she was a longtime public transportation user and that well-maintained transit systems required continued stewardship and investment to remain reliable. She explained that BART was crowded but functioned well and added that maintaining public transportation was important to keep people interested in using it. She stated that she preferred using autonomous vehicles to driving in San Francisco and said that reliable transportation benefited residents and visitors.

16. Adjournment

The meeting was adjourned at 10:40 a.m.

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MINUTES

Community Advisory Committee

Wednesday, July 22, 2026

1. Committee Meeting Call to Order

Chair Siegal called the meeting to order at 6:00 p.m.

CAC members present at Roll: Clara Baumgarten, Najuawanda Daniels, Sean Kim, Jerry Levine, Venecia Margarita, Austin Milford-Rosales, Rachael Ortega, and Kat Siegal (8)

CAC Members Absent at Roll: Sara Barz (entered during Item 2), Phoebe Ford (entered during Item 6), and Diana Labaro (3)

2. Chair's Report – INFORMATION

Chair Siegal reported on ongoing public outreach for the Western Addition–Geary Boulevard Community Study, the Bayview Caltrain Station Location Study, and the One Bay Area Grant (OBAG) Cycle 4 County Program, including upcoming engagement opportunities and anticipated CAC actions this fall. She added that CAC members interested in a briefing on the Bayview Caltrain Station Location Study before the September 9 CAC meeting should contact the Clerk of the Transportation Authority. She also thanked outgoing CAC member Sara Barz for her service and contributions to the committee.

Vice Chair Daniels thanked Member Barz for her service on the CAC, appreciated her thoughtful leadership and support during committee discussions, and wished her well in her future endeavors.

Member Barz thanked the Chair, Vice Chair, and staff and stated that serving on the CAC for the past four years was a pleasure. She added that she had decided not to seek reappointment, expressed confidence in her successor, and said she was saddened to leave the committee.

Member Margarita thanked Member Barz for her service, commented that Member Barz consistently advocated for the community, and wished her well in her future endeavors.

During public comment, Roland Lebrun thanked Member Barz for her service. He also stated that he was unable to find the meeting link and information about that evening's Bayview Caltrain Station Location Study outreach on the Transportation Authority website. [The Bayview Caltrain Station Location Study Update was presented to the Bayview Hunters Point Citizen Advisory Committee as Item 5c at its July 22, 2026 meeting. The meeting agenda is available at sfplanning.org/event/bayview-hunters-point-citizen-advisory-committee-meeting-11.]

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Consent Agenda

3. Approve the Minutes of the June 24, 2026 Meeting – ACTION

4. Investment Report and Debt Expenditure Report for the Quarter Ended June 30, 2026 – INFORMATION

There was no public comment on the Consent Agenda.

Member Margarita moved to approve the item, seconded by Member Milford-Rosales.

The Consent Agenda was approved by the following vote:

Ayes: CAC Members Barz, Baumgarten, Daniels, Kim, Levine, Margarita, Milford-Rosales, Ortega, and Siegal (9)

Absent: CAC Members Ford and Labaro (2)

End of Consent Agenda

5. Community Advisory Committee Ethics Training for Public Meetings– INFORMATION

Maria Lombardo, Chief Deputy, introduced the item and Amber Maltbie, Legal Counsel, presented the item.

Member Milford-Rosales asked whether tenants with leases longer than one month were treated the same as property owners for purposes of the program. He added that the language appeared to treat a one-year lease as a real property interest and asked whether that interpretation was correct.

Ms. Maltbie clarified that the provision was not intended to treat fixed-term leases as real property interests and added that the wording could be clarified.

Member Kim asked how CAC members should handle potential conflicts of interest when district-specific projects affected areas where they owned businesses. He asked whether members should recuse themselves under those circumstances.

Ms. Maltbie stated that potential conflicts of interest depended on whether a decision could have a financial impact on a member's financial interest, not on the district represented. She explained that members generally should recuse themselves from voting on matters affecting property or businesses within 500 feet of their financial interest but would not be required to recuse themselves if the matter was more than1,000 feet away.

Member Kim asked whether he would be required to recuse himself from voting on transportation projects along Geary Boulevard because he owned a business there. He added that Geary Boulevard projects often covered long corridors and questioned how he could serve on the CAC if he had to recuse himself from all Geary-related projects.

Ms. Maltbie clarified that an exception could apply if a decision affected a member's financial interest in the same manner as every other business along Geary Boulevard. She explained that conflict-of-interest determinations depended on the specific vote and added that the described situation would likely qualify for an exception allowing the member to participate because the law was not intended to prevent everyone affected from voting. She noted that this was a good example of why CAC members should reach

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out to staff in advance to discuss a possible conflict of interest, as staff may need a little time to make a determination based on the particular situation.

There was no public comment.

6. Adopt a Motion of Support to Approve the State and Federal Legislative Update – ACTION

Amber Crabbe, Senior Public Policy Manager, presented the item per the staff memorandum.

Member Levine stated that he supported the Senate Bill (SB) 1246 but believed it did not go far enough because it did not provide local authorities with the ability to enforce traffic violations involving autonomous vehicles (AVs). He added that construction contractors could be valuable supporters of future legislation because AVs created challenges in construction zones by blocking construction vehicle access.

Ms. Crabbe stated that staff was developing the state and federal legislative advocacy program for the upcoming legislative session, which would provide an opportunity to consider additional issues while acknowledging that issues would remain to be addressed even if SB 1246 passed.

Member Ortega stated that she would abstain from voting because her husband worked for a self-driving company and she believed she may have a financial interest related to the matter.

Member Barz asked whether the intent of SB 1246 was to provide emergency responders with greater control over AVs that became immobilized and blocked streets during incidents. She also requested an explanation of SB 1216, the budget trailer bill.

Ms. Crabbe explained that SB 1246 was intended as an initial step to prepare for increased AV deployment, such as providing emergency responders with the ability to put the car in neutral or turn it off so they could be move if necessary. She added that Mayor David Lurie recently issued a letter to the state requesting action to help address his concerns around AV interactions with emergency responders.

Member Barz also requested an explanation of SB 1216 and potential impacts of recent Cap-and-Invest program changes on transit capital and operating programs. She asked whether SB 1216 would effectively eliminate the availability of Cap-and-Invest funding for projects such as the SFMTA Train Control Upgrade Project.

Ms. Crabbe explained that the Cap-and-Invest expenditure plan was revised by the state legislature in 2025 and that transit capital, transit operations, and affordable housing programs were assigned to Tier 3 as a lower funding priority in the revised expenditure plan. She continued by stating that in early 2026 the California Air Resources Board (CARB) changed the way Cap-and-Invest revenues were collected. Further, she said that because the CARB action would reduce the total available Cap-and-Invest revenue, less funding, if any, would likely be available for those Tier 3 programs. Ms. Crabbe said that SB 1216 would delay distribution of the bulk of the Cap-and-Invest funding until the legislature identified an alternative way to fund Tier 3.

Member Barz asked whether SB 1216 was intended to allow the legislature to reconsider distribution of the Cap-and-Invest funding.

Ms. Crabbe confirmed that was correct.

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Member Margarita asked about SB 1246 and referenced a recent incident in District 9 in which she said an AV blocked an ambulance from reaching a resident experiencing a stroke. She asked whether the bill would apply retroactively.

Ms. Crabbe stated that SB 1246 was not intended to apply retroactively.

Member Baumgarten asked whether SB 1246 provided a mechanism for the public to report incidents that AV companies might not have self-reported and whether the bill's incident reporting provisions addressed that issue.

Ms. Crabbe replied saying that the bill did not address public reporting of incidents.

Member Baumgarten said it would be beneficial to provide a mechanism for the public to report AV incidents or require companies to incorporate reporting into their platforms, rather than relying on companies to self-report. She indicated support for amendments to SB 1246 to establish automatic penalties for violations rather than requiring cities and counties to file lawsuits to recover amounts owed.

Ms. Crabbe clarified that earlier SB 1246 language did not require a civil suit to seek penalties, but a subsequent amendment added that requirement to the bill.

Member Milford-Rosales asked whether the bill's $10,000 civil penalty for blocking emergency vehicles for more than 30 minutes had already been negotiated or whether it could still be amended to reduce the 30-minute threshold. He referenced a recent AV outage that blocked traffic and SFMTA T-Third service and noted that incidents that last less than 30 minutes could still have significant consequences.

Ms. Crabbe noted that it was late in the legislative process because bills needed to be approved by the Legislature by the end of August. She said staff would raise the issue with the bill's author. She added that SB 1246 was a first step and that staff would also consider CAC comments when developing future legislative priorities around Avs.

Member Milford-Rosales said he supported SB 1246 and looked forward to future efforts to strengthen AV regulation. He then asked staff to provide a summary of the status of SB 1167 and its definitions for electric bicycles, specifically how the bill distinguished between electric bicycles and more dangerous motorized vehicles.

Martin Reyes, Principal Transportation Planner, Government Affairs, stated that the Transportation Authority currently had a support position on SB 1167 (Blakespear). He explained that the bill clarified the definition of an electric bicycle and established prohibitions on manufacturers marketing vehicles as electric bicycles when they did not meet the bill's definition. He stated that staff reviewed approximately 10 e-bike bills at the beginning of the legislative session covering a range of issues. He explained that most of the bills were no longer proceeding, while SB 1167 and another e-bike bill by Assemblymember Wilson continued to move forward. He added that he could provide additional information after the meeting.

Chair Siegal stated that she supported the recommended support if amended position on SB 1246, although she was disappointed that the bill had been weakened and hoped it would serve as a starting point for future efforts. She thanked staff for monitoring SB 1216 and working with stakeholders and urged the Board to take stronger action to help secure funding for affected programs. She explained that the funding supports SFMTA capital projects as well as Muni's free and discounted fare programs.

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During public comment, Edward Mason stated there should be legislation to require licenses for bicyclists and scooters. He recommended charging AV manufacturers a fee to test vehicles in San Francisco.

Member Milford-Rosales moved to approve the item, seconded by Member Barz.

The item was approved by the following vote:

Ayes: CAC Members Barz, Baumgarten, Daniels, Ford, Kim, Levine, Margarita, Milford-Rosales, and Siegal (9)

Absent: CAC Member Labaro (1)

Abstention: CAC Member Ortega (1)

7. San Francisco Transportation Plan 2050+ Update – INFORMATION

Rachel Hiatt, Deputy Director for Planning, introduced the item and Suany Chough, Assistant Deputy Director for Planning, presented the item.

Member Ford asked whether the proposed $80 billion investment plan would serve as a distributional guideline for allocating funding after 2050, including directing 67% of the funds to transit operations.

Ms. Chough explained that the investment plan covers the period through 2050 and establishes funding priorities but does not commit funding to specific projects or programs. She added that the proposed funding levels were based on identified needs and were intended to address those needs.

Member Ford referenced her experience with an annual planning process and stated that she viewed the SFTP as identifying goals without clearly describing the actions that would achieve them. She asked how the plan would improve transportation reliability given its stated objectives.

Ms. Chough explained that the SFTP is a long-term funding plan and therefore does not provide project-level implementation details. She added that the plan identifies broad funding priorities, including transit maintenance, and assumes funding levels for agencies such as SFMTA, BART, and Caltrain over the next 25 to 30 years.

Ms. Hiatt explained that the SFTP's funding needs and investment priorities were developed from detailed estimates for individual projects and project categories, including transit maintenance, major transit projects, bicycle infrastructure, and roadway maintenance that were developed for Plan Bay Area, the region's long-range transportation plan.

Member Ford asked whether the SFTP included a list of planned, cost-estimated, and prioritized projects organized by the plan's goals and whether the investment plan identified how much of the documented need could be funded based on available resources.

Ms. Chough explained that the SFTP identifies some individual projects but that most of the funding is organized by program rather than by specific projects, such as individual curb ramps.

Chief Deputy Director Maria Lombardo explained that the SFTP serves as a 30-year investment vision for San Francisco rather than a programming document that assigns

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funding to specific projects. She stated that most transportation funding was already committed to existing purposes, such as transit operations, leaving only a limited amount of discretionary funding where this was a choice about how to use that funding. She continued by reiterating that the SFTP, like Plan Bay Area, generally organizes investments into broad funding categories, with limited project-specific exceptions – typically for major capital projects with air quality impacts, and that it serves as a guide for future funding priorities and project selection. She ended by noting that programming or assigning funds to specific projects typically happen through efforts such as the Prop L 5-Year Prioritization Programs

Member Barz asked why staff prepared a long-range transportation plan.

Ms. Chough explained that the SFTP was developed in part to satisfy regional planning requirements and to inform Plan Bay Area. She stated that staff used regional growth and revenue projections to develop the plan, establish local priorities, and provide input to the regional planning process. She added that inclusion in the regional plan was required for some projects to qualify for certain funding sources.

Ms. Lombardo added that the update before the CAC was a minor update and that it was occurring during a period of uncertainty regarding transit funding as multiple Bay Area operators – including Muni, BART, and Caltrain, continued to struggle with lower revenues and travel behavior changes post-pandemic. She explained that previous versions of the SFTP informed reauthorization of the local sales tax that led to Prop K and Prop L. She stated that future major updates would likely be used to inform consideration of new local or other revenue sources, but this minor update had less focus on that area given efforts already underway to address the transit fiscal cliff such as the regional and local measures on the November ballot.

Member Barz stated that a 30-year planning horizon was difficult to compare with shorter-term planning processes and asked whether staff prepared the long-range transportation plan because it was required as part of the regional transportation planning process led by the Metropolitan Transportation Commission (MTC) pursuant to state and federal requirements.

Ms. Hiatt confirmed Member Barz's understanding and explained that the SFTP brings together the funding needs and priorities of multiple transportation modes and operators, including Caltrans, into a single countywide planning process. She added that individual operators prepare their own capital improvement plans, while the SFTP allows priorities to be evaluated across agencies and transportation modes.

Member Barz asked how public outreach influenced the SFTP and whether the feedback resulted in changes to the plan or staff's planning priorities.

Ms. Chough explained that the draft investment plan was revised to reflect lower projected revenues since it needed to be financially constrained. She stated that public outreach reinforced staff's recommendation to maintain high levels of investment in transit operations, transit maintenance, and street and freeway maintenance, and that feedback supporting reliable transit helped shape the Vision Plan's investment priorities.

Member Barz stated that, based on the outreach results, she would have prioritized additional investment in expanded transit service and said that staff should bring future funding tradeoffs and investment options to the CAC for discussion before finalizing recommendations. She added that the discussion improved her understanding of the purpose of the SFTP and encouraged staff to involve the CAC more directly in future decision-making.

Ms. Hiatt explained that major transit expansion priorities are evaluated during major updates to the SFTP and explained that the current investment scenario was based on priorities established during the 2022 major update and the San Francisco Transit Strategy. She added that the investment scenario included funding for several major transit expansion projects at varying levels and that some projects received only partial funding to support continued advancement. She concluded by noting that the next major update would provide an opportunity to reconsider San Francisco's transit expansion priorities and said that the Board already directed staff to consider that issue.

Member Ortega stated that she agreed with Members Ford and Barz regarding the need for greater emphasis on major transit improvements. She said that she would like the next major update to include a comprehensive review of SFMTA's transit network, including whether routes should remain primarily downtown-oriented. She also asked how the SFTP accounted for long-term inflation, population projections, and post-pandemic recovery trends in developing its 30-year funding assumptions.

Ms. Chough explained that the minor update relied on MTC projections [which the Transportation Authority provided input to] rather than a comprehensive reassessment of costs and revenues and that those projections resulted in about a 12% reduction in anticipated revenues. She stated that the next major update would include a ground-up analysis of costs and revenues. She added that the current plan expressed costs in constant 2020 dollars and that the next major update would use MTC's year-of-expenditure methodology.

Member Ortega stated that clearly identifying the use of constant-dollar and year-of-expenditure cost estimates would help improve understanding of project budgets. She said that staff should address opportunities to lower project costs in future updates, where appropriate, and explain any such efforts. She also said that staff should include an overlay graph comparing the unconstrained and constrained investment scenarios to illustrate the differences more clearly.

Member Baumgarten stated that she appreciated the SFTPs long-term vision. She asked whether improvements to transit reliability, frequency, and on-time performance identified through public outreach were funded through the transit operations budget or a different funding category.

Ms. Chough explained that improvements to transit reliability were supported through both transit operations and major transit projects. She stated that lower-cost improvements, such as transit priority lanes, signal priority, boarding islands, and other Muni Forward improvements, helped improve transit speed and reliability, while major transit projects, such as new routes and grade separations, fell under the major transit projects category.

Member Baumgarten stated that she believed the SFTP reflected the interests of District 3. She asked how community members could continue providing input as the plan evolved and whether future opportunities for public feedback would be available so CAC members could help share information with their communities.

Ms. Chough explained that the next major update would provide the primary opportunity for public input on the SFTP. She said that staff would pursue more robust outreach,

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particularly in communities with large populations of non-English speakers, by meeting residents where they are, such as at community events and farmers markets. She added that staff would welcome the CAC's assistance in promoting outreach efforts and engaging community members in future planning activities.

Ms. Lombardo explained that the SFTP primarily was intended to guide funding levels for broad program categories rather than specific projects, while the CAC also had opportunities to provide input on prioritizing specific projects and locations through separate planning and fund programming processes such as the sales tax 5-Year Prioritization Programs.

Member Kim stated that improving transit reliability required evaluating post-pandemic travel demand and adjusting transit service accordingly. He explained that recent experiences with Caltrain and SFMTA service following major events illustrated the need to better align service frequency and operating schedules with actual demand, including evenings and weekends. He added that transit operations funding should include analysis of travel patterns and demand to support service planning.

Chair Siegal asked for the total cumulative unfunded need in the updated SFTP. Ms. Chough replied that she could follow up with that information. Chair Siegal then stated that she valued the SFTP as a public resource that informed her understanding of funding priorities and supported discussions about future revenue sources. She added that she looked forward to reviewing the final, more detailed report.

During public comment, Edward Mason stated that he questioned assumptions regarding job growth and major transit investments based on his views about demographic trends, travel behavior, and broader societal conditions. He added that changing transportation preferences, including the use of rideshare services, should be considered when evaluating transportation needs. He asked whether new major transit projects were affordable given those concerns.

Roland Lebrun stated that he believed the current approach to transportation planning was ineffective and advocated for a more coordinated regional strategy. He added that he supported developing a single integrated transportation corridor extending from Gilroy to the North Bay under one managing entity. He also stated that Link21 should be included in those regional planning efforts.

Other Items

8. Introduction of New Business – INFORMATION

Member Levine asked for an update on the Van Ness Bus Rapid Transit project comparing current conditions with conditions before the project was completed. He asked staff to prepare a study for CAC members, rather than a presentation, reporting on the project's results as of 2026.

Member Margarita asked whether staff could evaluate the Silver Avenue area in District 9, including Sweeny Street between Silver Avenue and Princeton Street, to identify potential safety improvements. She stated that the area lacked sufficient traffic-calming measures and referenced a pedestrian fatality and multiple hit-and-run collisions. She said that staff should pursue preventive improvements to slow traffic and improve pedestrian safety.

There was no public comment.

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9. Public Comment

During public comment, Roland Lebrun stated that he experienced audio and video issues while attending meetings of the Transbay Joint Powers Authority (TJPA). He said that the Transportation Authority's meeting audio and video setup worked well and he encouraged staff to share the camera arrangement and audiovisual technology with the TJPA..

10. Adjournment

The meeting was adjourned at 8:25 p.m.

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DRAFT MINUTES

Community Advisory Committee

Wednesday, September 9, 2026

1. Committee Meeting Call to Order

Chair Siegal called the meeting to order at 6:06 p.m.

CAC members present at Roll: Najuawanda Daniels, Sean Kim, Venecia Margarita, Austin Milford-Rosales, and Kat Siegal (5)

CAC Members Absent at Roll: Jerry Levine, Clara Baumgarten, Phoebe Ford, and Rachael Ortega (4)

2. Chair's Report – INFORMATION

Chair Siegal recognized September as Transit Month in the Bay Area, celebrating transit agencies, drivers, workers, and riders, and encouraged everyone to explore the region by transit and thank transit operators and workers.

Chair Siegal reported that public engagement was underway for the Transportation Authority-led Bayview Street Safety and Truck Relief Study and the Western Addition-Geary Boulevard Community Study. She noted that the first round of Bayview outreach concluded in August and included engagement with community leaders and organizations, neighborhood tabling, and a multilingual survey, with additional stakeholder workshops planned in October and a second round of outreach anticipated next spring. She said that Western Addition-Geary Boulevard outreach included September community events and town halls, along with a multilingual survey seeking feedback on study goals, neighborhood priorities, safety concerns, and desired uses and amenities along the corridor. Chair Siegal pointed interested parties to the agency website (www.sfcta.org) for more information about the studies.

There was no public comment.

3. Approve the Minutes of the July 22, 2026 Meeting – ACTION

There was no public comment.

Vice Chair Daniels moved to approve the item, seconded by Member Milford-Rosales.

The minutes were approved by the following vote:

Ayes: CAC Members Daniels, Kim, Margarita, Milford-Rosales, and Siegal (5)

Absent: CAC Members Baumgarten, Ford, Levine, and Ortega (4)

4. Adopt a Motion of Support to Allocate $22,500,000 in Prop L Funds, with Conditions, to the Transbay Joint Powers Authority for The Portal Project Engineering Phase Activities Starting October 1, 2026, and Appropriate $3,500,000 in Prop L Funds, with Conditions, for The Portal Project Oversight, Engagement, and Work Program for Initiation of Pre-Construction — ACTION

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Carl Holmes, Deputy Director for Capital Projects, presented the item per the staff memorandum.

Chair Siegal asked how recent California Air Resources Board (CARB) changes impacting the Greenhouse Gas Reduction Fund could affect anticipated state funding for The Portal Project, how much funding was expected from that source, and whether alternative funding sources had been identified.

Mr. Holmes replied that staff was monitoring the funding risk and had noted it in the Board memorandum. He stated that the final outcome was not yet known, but that the overall funding amount had been reduced for sources the project is targeting, increasing the risk. He added that staff was discussing contingency options with TJPA, including adjustments to early works or contract phasing, but that no alternative had been finalized.

Member Margarita asked about the risk of project funding partners withdrawing, particularly the Federal Transit Administration (FTA) given its significant share of project funding.

Mr. Holmes replied that the partnership with the FTA remained strong and that the project continued to advance through the engineering phase toward a full funding grant agreement. He added that the project team met monthly with FTA and its oversight consultants.

Member Margarita asked for clarity on planned service to the Salesforce Transit Center in the future.

Mr. Holmes clarified that Salesforce Transit Center would be the terminus of the rail extension, with Caltrain serving it initially and California High-Speed Rail planned to serve it in the future.

Member Ford asked about the role, organizational structure, staffing, and governance of TJPA, including who it reported to. She also asked how the approximately $600 million work plan was divided between construction and land acquisition versus professional services and how much of the project management and engineering work was performed by staff versus consultants.

Mr. Holmes replied that TJPA was a partnership including but not limited to board representation from San Francisco and the Peninsula. He noted that San Francisco Board of Supervisors President Mandelman served as Vice Chair and that Jeff Gee, representing Caltrain, served as President of the TJPA Board.

Alfonso Rodriguez, Project Director at TJPA, added that TJPA was a joint powers authority whose membership included the City and County of San Francisco [including the SFMTA], Caltrain, California High-Speed Rail, and AC Transit, with a total of four of seven voting Board members appointed by San Francisco. He explained that TJPA drew its authority from its member agencies, had fewer than 25 employees, and relied heavily on consultants to support The Portal Project. He added that the request included right-of-way and design work and that TJPA planned to issue requests for proposals for designers. Mr. Rodriguez also stated that nearly 10% of the project's estimated cost had already been constructed in the form of the train box beneath Salesforce Transit Center and that FTA had allowed approximately $730 million in previously invested costs to count as local match toward the planned CIG funds.

Member Ford stated that when The Portal Project returned to the CAC in future meetings,

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it would be helpful to clarify the respective responsibilities of TJPA, the City, and other agencies and establish a baseline for monitoring consultant costs compared with in-house work.

Member Kim asked how the existing train box would be maintained while it remained unused and how future changes in train specifications could affect the train box.

Mr. Holmes replied that the train box was essentially an unused concrete basement beneath Salesforce Transit Center and did not yet contain rail infrastructure. He stated that its maintenance requirements were minimal and that rail would be installed as part of future project work.

During public comment, Edward Mason asked how much had been spent on consultant reports for the project over the years including for work that was no longer relevant citing vents planned to accommodate diesel-Caltrain service. He expressed concern about anticipated ridership, citing several Bay Area transit projects that he said had achieved substantially less ridership than originally estimated, and asked what ridership was anticipated for the $8 billion Portal Project and whether autonomous vehicles would reduce future transit ridership.

Roland Lebrun stated that options should remain open in the coming months in case other funding sources were needed to keep Muni and BART operating. He disputed describing Salesforce Transit Center as a terminus, citing the California State Rail Plan and stating that it was intended as a through station with multiple rail operators. He also referenced a proposal he said he had submitted to MTC regarding regional rail assets and private-sector operation and cited the Société Nationale des Chemins de Fer Français (SNCF), the French national railway company, in connection with earlier California high-speed rail planning and Morocco's high-speed rail system.

Member Ford moved to approve the item, seconded by Member Milford-Rosales.

The item was approved by the following vote:

Ayes: CAC Members Daniels, Ford, Kim, Margarita, Milford-Rosales, and Siegal (6)

Absent: CAC Members Baumgarten, Levine, and Ortega (3)

5. Adopt a Motion of Support to Adopt San Francisco's One Bay Area Grant Cycle 4 Project Nominations – ACTION

Nicolette Chan, Senior Transportation Planner, and Erin Slichter, Transportation Planner, presented the item per the staff memorandum.

Member Kim asked what the 120% nomination target meant.

Ms. Chan explained that MTC asked each Congestion Management Agency (CMA) to submit project nominations totaling up to 120% of its nomination target. She stated that San Francisco's 120% target was $56.6 million and that, after the set-asides for CMA planning and the Safe Routes to School Non-Infrastructure Program, $48.7 million remained for the call for projects. She added that when MTC selected projects, it would aim to fund each county close to its 100% target, which was $39.2 million for San Francisco.

Maria Lombardo, Chief Deputy Director, added that MTC is the agency that selects the projects to be funded and to do this, they need a larger pool of projects to choose from, which was why counties were asked to nominate projects totaling 120% of their target.

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Member Kim asked whether the $5.8 million for the Safe Routes to School Non-Infrastructure Program over the next four years included staff expenses or was entirely for third-party expenses.

Anna LaForte, Deputy Director for Policy and Programming, replied that the $5.8 million covered a combination of staff time to administer and oversee the program, as well as funding for the contractor that runs the program and its subconsultants. She added that she could not recall whether the current funding also supported staff at the school district, although it had in past iterations.

Member Kim requested that the SFMTA provide information for the past four years on the total funding for the Safe Routes to School Non-Infrastructure Program, including a breakdown of funding for third-party expenses and in-house staff expenses.

Ms. LaForte stated that the CAC typically considered an item annually for the local match required for federal OBAG funds and that the approximately $220,000 annual allocation Member Kim recalled was the required local match. She added that staff would provide background information on what had been approved in April.

Member Ford asked for the individual project scores and asked about the relative scoring of the Treasure Island Electric Ferry Pilot compared with the proposed BART improvements at the 16th Street station, citing the difference in ridership between the two projects and indicating that she would have thought the BART project would have scored higher than the ferry project.

Ms. Chan stated that the total scores for each project were provided in Attachment 3 of the memorandum.

Member Ford noted that the Treasure Island Electric Ferry Pilot scored three points higher than the 16th Street Mission Elevator Modernization project and one point lower than the 22nd Street Station ADA Improvement project. She stated that the scores appeared somewhat subjective and asked what was distinctive about the proposed first-of-its-kind electric ferry and what caused it to score higher.

Ms. Slichter stated that the Treasure Island Electric Ferry Pilot scored well on many factors such as project readiness and deliverability and transit reliability and accessibility because the electric ferry would provide three times the capacity of the current ferry, which she said sometimes could not accommodate all waiting passengers. She stated that the project also received strong scores for community support, serving an Equity Priority Community, and environmental sustainability.

Member Ford asked whether the additional ferry capacity would come from more ferry trips or from greater passenger capacity on each vessel.

Ms. Slichter replied that the additional capacity would come from the larger vessel, which could carry approximately 150 passengers compared with about 50 on the current ferry. She added that the electric ferry also would include additional bicycle parking to support bicycle travel between the East Bay and San Francisco as part of the Bay Skyway.

Member Ford stated that the project readiness criterion could favor projects that had already advanced over projects that might provide greater benefits or value. She requested that, when the scoring criteria were considered in the future, staff consider reducing the weight given to project readiness, noting that access to funding itself could help make projects more ready.

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Ms. LaForte explained that the federal funds used for OBAG were subject to strict timely-use-of-funds requirements [set by federal entities and layered on by MTC to avoid loss of funds to the region] and that those requirements were a primary factor in evaluating project readiness and deliverability. She added that two prior OBAG cycles had provided funding for BART elevator projects, including elevator work at Embarcadero Station.

Ms. Slichter added that the prior OBAG-funded BART elevator work also included BART stations along Market Street.

Ms. LaForte continued to explain that since both of the prior OBAG-funded BART elevator projects had experienced delivery issues and neither BART elevator project was completed, that this factored into the evaluation of project readiness for the 16th Street Mission Elevator Modernization project in the current cycle.

Member Milford-Rosales asked whether the Treasure Island ferry service would include any frequency improvements or whether the proposed change was limited to increased vessel capacity.

Suany Chough, Assistant Deputy Director for Planning, replied that staff was developing the business plan for the ferry service and did not anticipate significant changes to the schedule. She stated that the service was expected to operate about 14 trips, approximately the same as the current service.

Member Milford-Rosales noted that state requirements to transition transit vehicles to electric propulsion could increase costs for local transit agencies, including infrastructure and vehicle costs. He asked how the ferry's increased passenger capacity was considered as an environmental benefit relative to the benefit of electrification itself, stating that a primary benefit of public transportation was shifting people from cars to shared vehicles.

Ms. Chough replied that the larger ferry would accommodate more passengers as population and jobs grew on Treasure Island and would be more efficient to operate with the same size crew. She stated that most funding for the new vessels and electrification infrastructure had come from other state and federal grants as part of broader San Francisco Bay ferry electrification efforts. She added that the ferry business plan was evaluating operating costs and developing a 10-year funding plan and that OBAG funding would provide significant support for the service. She also stated that providing emission-free ferry service was important for Treasure Island as an Equity Priority Community.

Member Milford-Rosales asked whether he correctly understood that most funding for electrification had come from broader state and federal ferry electrification grants and that the current request was primarily to support initial service.

Ms. Chough confirmed that the OBAG funding was for the first three years of the pilot service (operations). She stated that after the pilot period, the service would rely on Treasure Island-specific funding sources, including a developer subsidy and a congestion management tool identified in the plan.

Member Milford-Rosales stated that he supported increasing ferry capacity and frequency between Treasure Island and the rest of San Francisco given the difficulty of traveling to and from the island without a car. He stated that available funding should prioritize improving transit service over related improvements.

Chair Siegal stated that she was surprised the 16th Street Mission Elevator Modernization

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project had not ranked more highly given its importance for reliability and accessibility at a heavily used station in an Equity Priority Community and appreciated staff's earlier responses. She noted that the project application indicated limited competitiveness for other funding sources and asked whether alternative funding could be identified to help fund the project. She also asked whether the Transportation Authority could help BART complete its current elevator projects more quickly so that future elevator projects, such as those at 24th Street and Balboa Park stations, could be more competitive for funding.

Ms. LaForte replied that the Transportation Authority had previously funded BART elevator projects through Prop AA, as well, which dedicates a portion of revenues to transit reliability and accessibility improvements, and that Prop L also included funding for BART state-of-good-repair projects. She stated that the next five-year Prop L programming process would begin around the same time the following year and added that, depending on project readiness, the 16th Street elevator project might be positioned to seek construction funding through OBAG 5.

Michael Gerbracht, Project Manager at BART, stated that the 16th Street elevator project was in the early stages of design and was scheduled to be ready for construction in 2029. He said BART hoped to identify additional funding before then and noted that other elevator projects, including Embarcadero, other Market Street stations, and Glen Park, were further along. He added that 16th Street was expected to be approximately the 10th or 12th elevator delivered through the program and that 24th Street and Balboa Park were among the priorities for future planning and design.

Member Ford asked whether BART's elevator project delivery had improved over successive projects, how BART was measuring that performance from project to project, and what key barriers continued to affect project delivery.

Mr. Gerbracht stated that BART had made changes to elevator design requirements and technical specifications after addressing accessibility and construction challenges. He said vendor, consultant, and industry input had resulted in stronger contract packages and that lessons learned from projects further along in design were being incorporated into the 16th Street elevator project. He added that BART expected these changes to improve the project's schedule and delivery and said the program was continuing to apply lessons learned from earlier projects.

During public comment, Roland Lebrun expressed concern about the recommendation to advance Oakdale Avenue rather than Evans Avenue as the preferred location for the Bayview Caltrain Station and asked why the station location recommendation had not previously come before the CAC. He referenced prior planning for an Oakdale station, the vacation of Quint Street, relocation of the Southeast Community Center, and nearby San Francisco Public Utilities Commission (SFPUC) digester facilities as reasons for his concern. He asserted that work on the Pennsylvania Avenue Extension had influenced the station location and advocated instead for stations at Evans Avenue and Paul Avenue. He also opined that the Downtown Rail Extension (or The Portal) cost twice as much as the proposed new Transbay tunnel and requested that the Oakdale recommendation be brought back to the CAC for discussion.

Ms. Lombardo added that the Bayview Caltrain Station Location Study would come before the CAC for approval before going to the Board. She added that staff was completing public outreach prior to bringing the item to the CAC.

Member Margarita moved to approve the item, seconded by Member Milford-Rosales.

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The item was approved by the following vote:

Ayes: CAC Members Daniels, Ford, Kim, Margarita, Milford-Rosales, and Siegal (6)

Absent: CAC Members Baumgarten, Levine, and Ortega (3)

Other Items

6. Introduction of New Business – INFORMATION

Member Kim requested that SFMTA be invited to a future CAC meeting to provide an update on parking fees in Golden Gate Park, including how the changes would be implemented and when they would take effect.

Member Margarita stated that the CAC should reconsider how it evaluates and approves large transportation investments in light of other needs facing San Francisco, including housing and homelessness. She also expressed concern about the transportation budget deficit and its potential effects on workers and employment and encouraged greater consideration of how individuals and the community could support the transportation system.

Chair Siegal requested an update on San Francisco programs and projects that could be at risk due to reliance on Low Carbon Transit Operations Program (LCTOP) and Transit and Intercity Rail Capital Program (TIRCP) funding following changes to the Greenhouse Gas Reduction Fund (GGRF). She noted her understanding that the recently concluded legislative session had not identified new funding to backfill the reduced funding available.

Ms. Lombardo stated that the CAC would receive a legislative update at the next meeting and noted that staff was also awaiting the Governor's decisions on pending bills.

There was no public comment.

7. Public Comment

During public comment, Edward Mason expressed concern about disruptions caused by corporate commuter buses in residential neighborhoods. He described recent incidents at 21st and Church streets and 24th and Noe streets in which disabled or stranded commuter buses required large tow trucks and disrupted traffic and Muni service for extended periods. He added that multiple commuter buses arriving around the same time near 24th and Church streets also contributed to neighborhood congestion.

Roland Lebrun responded to concerns raised about the scale of transportation spending and stated that he had recently written to MTC proposing a different approach. He raised concerns about the Downtown Rail Extension, citing concerns about its cost, lack of a connection to the East Bay, platform design, transfers to Muni light rail, and potential construction impacts in SoMa. He stated that, after advocating on these issues for many years, he proposed turning the broader rail alignment over to the private sector, with work performed in-house rather than through consultants, and referenced a $20 billion project with $5 billion in private investment.

8. Adjournment

The meeting was adjourned at 7:32 p.m.

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Memorandum

AGENDA ITEM 4

DATE: September 08, 2026

TO: Transportation Authority Board

FROM: Maria Lombardo – Chief Deputy Director

SUBJECT: 09/15/26 Board Meeting: Appoint Abigail Pantoja as the District 11 Representative to the Community Advisory Committee

RECOMMENDATION ☐ Information ☒ Action

Per Section 5.2(a) of the Administrative Code, each Commissioner shall nominate one member to the Community Advisory Committee (CAC). Neither staff nor CAC members make recommendations regarding CAC appointments.

SUMMARY

There is an open seat on the 11-member CAC for District 11 as the result of the prior representative resigning from the CAC. Commissioner Chen has indicated her intent to nominate Abigail Pantoja as the District 11 representative. The Administrative Code requires the CAC applicant to appear before the Board to speak to their interests and qualifications for serving on the CAC. Members serve for a two-year term. There are no term limits. The current roster of CAC members is included in Attachment 1. The application for the CAC candidate is included in Attachment 2.

☐ Fund Allocation

☐ Fund Programming

☐ Policy/Legislation

☐ Plan/Study

☐ Capital Project Oversight/Delivery

☐ Budget/Finance

☐ Contract/Agreement

☒ Other: CAC Appointment

BACKGROUND

As described in the Transportation Authority's Administrative Code, the CAC shall provide input to the Transportation Authority in:

1. Defining the mission of the Transportation Authority;
2. Reflecting community values in the development of the mission and program of the Transportation Authority, and channeling that mission and program back to the community;
3. Defining criteria and priorities for implementing the Expenditure Plan programs consistent with the intention of the half-cent sales tax funding purposes; and

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4. Monitoring the Transportation Authority's programs and evaluating the sponsoring agencies' productivity and effectiveness.

DISCUSSION

The Board appoints 11 members to the CAC and each Commissioner nominates one member to the committee. 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 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 accepted on a continuous basis and can be submitted through the Transportation Authority's website at sfcta.org/cac.

All applicants are advised that they need to appear in person before the Board in order to be appointed. 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. Applicants who were previously CAC members, but whose membership was terminated due to missing four of the last 12 regularly scheduled meetings must appear before the Board to be reappointed.

FINANCIAL IMPACT

The requested action would not have an impact on the adopted Fiscal Year 2026/27 budget.

CAC POSITION

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

SUPPLEMENTAL MATERIALS

- Attachment 1 – CAC Roster
- Attachment 2 – CAC Application
- Attachment 3 – Resolution

ATTACHMENT 1

Community Advisory Committee Members

Name	Gender	Ethnicity*	District	Neighborhood	Affiliation / Interest	First Apppointed	Term Expiration
VACANT			7				
VACANT			11				
Rachael Ortega	Female	Caucasian, European, or White	8	NP	Business;Environment;Social and racial justice;Neighborhood;Public Policy	October 2022	October 2026
Jerry Levine	Male	Caucasian, European, or White	2	Cow Hollow	Business; Neighborhood; Public policy	November 2018	February 2027
Sean Kim	Male	East Asian	1	Central Richmond	Business;Disabled;Environment;Social and racial justice;Labor;Neighborhood;Public Policy;Senior	May 2023	May 2027
Phoebe Ford	Female	Caucasian, European, or White	4	Central Sunset	Business;Environment;Neighborhood	September 2023	September 2027
Najuawanda Daniels	Female	Black descended or African American	10	NP	Social and racial justice;Labor;Neighborhood;Public Policy	September 2022	October 2027
Austin Milford-Rosales	Male	Caucasian, European, or White	6	Mission Bay/SOMA	Environment;Public Policy	October 2023	October 2027
Venecia Margarita	Female	Hispanic, Latino, or Latinx	9	Portola	Business;Disabled;Environment;Social and racial justice;Labor;Neighborhood;Public Policy;Senior;Youth, undocumented communities	February 2024	March 2028
Kat Siegal	Female	Caucasian, European, or White	5	Cole Valley / Haight Ashbury	Disabled; Environment; Social and racial justice ;Labor; Neighborhood; Public Policy; Senior; Other	February 2022	March 2028
Clara Baumgarten	Female	Caucasian, European, or White	3	Russian Hill	Business;Environment;Social and racial justice;Labor;Neighborhood;Public Policy	April 2026	April 2028

***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 | ME – Middle Eastern**
*** NP – Not Provided (Voluntary Information)**

ATTACHMENT 2

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San Francisco County Transportation Authority

Application for Membership on the Community Advisory Committee

FIRST NAME	LAST NAME	GENDER (OPTIONAL)	
Abigail	**Pantoja**	**Female**	

ETHNICITY (OPTIONAL)	IDENTIFY AS HISPANIC, LATINO, OR LATINX? (OPTIONAL)
	Yes

HOME SUPERVISORIAL DISTRICT	NEIGHBORHOOD OF RESIDENCE	HOME PHONE	HOME EMAIL
District 11		**[redacted]**	**[redacted]**

STREET ADDRESS OF HOME	CITY	STATE	ZIP
[redacted]	**[redacted]**	**[redacted]**	**[redacted]**

Statement of qualifications:

I have been a San Francisco resident for almost 12 years and have been a longtime public transportation rider. Over the years, I've seen and experienced the changes in the city firsthand as I moved between different neighborhoods and jobs. Public transportation has always been something I relied on in my daily life, and throughout my work experience I have also supported communities who depend on reliable and accessible transit every day.

I currently work as a Program Assistant at the University of San Francisco, and before that I worked in nonprofits and startup environments where I managed budgets, coordinated logistics, and supported events and operations. Working in these different spaces helped me build strong communication, organization, and problem-solving skills while working with many different communities and needs.

Both my personal and professional experiences have shown me how connected transportation is to people's everyday lives, whether that is access to work, school, housing, or community resources. As someone who uses public transportation regularly and cares about the future of San Francisco, I would appreciate the opportunity to bring my perspective and experiences to the Community Advisory Committee and support transportation planning that better serves residents across the city.

Statement of objectives:

My main objectives would be to advocate for transportation decisions that consider the experiences of working-class communities, students, immigrants, and residents who rely heavily on public transit to get to work, school, and essential services. I also hope to contribute thoughtful community perspectives around accessibility, safety, sustainability, and the connection between transportation, housing, and quality of life in the city.

Continued on next page

Please select all categories of affiliation or interest that apply to you:
Social and racial justice; Neighborhood; Parents/families

Can you commit to attending regular meetings (about once a month for the Transportation Authority CAC, or once every two to three months for project CACs):

Yes

By entering your name and date below, and submitting this form, you certify that all the information on this application is true and correct.

Abigail Pantoja	**5/6/2026**
NAME OF APPLICANT	DATE

ATTACHMENT 3

San Francisco
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BD091526 RESOLUTION NO. 27-XX

RESOLUTION APPOINTING ABIGAIL PANTOJA AS THE DISTRICT 11 REPRESENTATIVE 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 11 members; and

WHEREAS, There is currently a vacancy on the CAC for a District 11 representative; and

WHEREAS, At its September 15, 2026 meeting, Commissioner Chen nominated Abigail Pantoja as the District 11 CAC representative; and

WHEREAS, Abigail Pantoja spoke to her interest and qualifications for serving on the CAC at the September 15, 2026 Board meeting; and

WHEREAS, The Board reviewed and considered the applicant's qualifications and experience; now therefore, be it

RESOLVED, That the Board hereby appoints Abigail Pantoja as the District 11 representative 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.

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AGENDA ITEM 5

STATE AND FEDERAL LEGISLATION – SEPTEMBER 2026

(Updated September 8, 2026)

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

Staff are recommending approval of a new support position on Federal House of Representatives (H.R.) 10033 (Mullin (CA-15)) as shown in **Table 1**. **Table 2** provides an update on State Senate Bill 1246 (Cortese), on which the Transportation Authority has a support position.

Table 3 shows the status of state and federal bills for which the Transportation Authority has taken a position or identified as a bill to watch in Year 2 of the legislative session. Updates to bills since the Board's last legislative update are italicized.

The State Legislature recessed from the 2025-2026 legislative session on August 31, 2026. Governor Newsom has until September 30 to sign or veto bills or let them become law. The 2027-2028 state legislative session will begin in December 2026.

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Table 1. Recommended New Federal Positions

Recommended Positions	Bill # Author	Title and Summary
Support	H.R. 10033 Mullin (CA-15)	**Autonomous Vehicle (AV) Emergency Response Coordination Act.** In late July, Rep. Kevin Mullin (D-CA) introduced the AV Emergency Response Coordination Act which would require the National Highway Transportation Safety Administration (NHTSA) to set minimum safety standards for AV interactions with first responders, addressing a current gap in a national autonomous vehicle policy. First responder interactions first emerged out of early development cities, revealing the importance of federal regulations and legislation being developed in coordination with cities already experiencing and regulating robotaxi deployments. Specifically, the AV Emergency Response Coordination Act would: • Require AV companies to provide clear, standardized emergency response protocols for first responders; • Establish a 24/7 hotline for public officials to communicate directly with AV companies during autonomous vehicle incidents; • Direct NHTSA to develop minimum national emergency response standards across AV operators; and • Create a process for public officials to issue "geofence notices" so that AVs avoid certain areas during an emergency or while there is an ongoing safety hazard. We worked with Representative Mullin on the legislative language and joined him, Mayor Daniel Lurie, Chair Melgar, and others for the Congressman's announcement of the bill in July. While the bill is not expected to advance this year, we will continue working at the federal level to educate legislators about the need to address the issue and suggest incorporating the concept into a broader federal AV policy framework.

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Table 2. Updates on Select Bills with Positions or on the Watch List

Recommended Positions	Bill # Author	Title and Summary
Support	SB 1246 Cortese D	**Autonomous vehicles.** The purpose of the bill is to ensure autonomous vehicle (AV) companies act quickly, trained personnel are accountable, and first responders have the resources they need to keep the public safe. It imposes new requirements on commercial AVs (including robotaxis) and AV manufacturers pertaining to remote assistants, remote drivers, local incident technicians, and emergency response. It also requires manufacturers to collect emergency response data. In July, the Transportation Authority approved a Support and Seek Amendments position on the bill and staff approached the author with a request to amend the bill to **require that the emergency response data collected by AV manufacturers be reported to the Departments of Motor Vehicles on a quarterly basis (versus making it available upon request), and to ensure that data is publicly available.** In late August the bill was amended to include the quarterly reporting requirement as well as a requirement that the DMV make the data available publicly in summary form. We appreciate that the author was willing to incorporate our requested amendments in the final version of the bill.

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Table 3. Bill Status for 2025-26 State and Federal Legislative Sessions

State Bills

Adopted Positions / Monitoring Status	Bill # Author	Bill Title and Description	Update to Bill Status[1] (as of 9/9/2026)
Support	AB 1421 Wilson D Co-authors: Aguiar-Curry D	**Vehicles: Road Usage Charge Technical Advisory Committee.** Requires the California Transportation Commission and California State Transportation Agency to prepare research and recommendations related to a mileage-based road user charge system by January 1, 2027.	*Dead*
	AB 1837 Gonzalez D Co-authors: Arreguín D Hoover R McKinnor D Nguyen D	**Video imaging of parking violations.** Extends the authorization for public transit operators to use camera enforcement technology on buses to enforce parking violations in transit-only lanes and at transit stops to January 1, 2034.	*Enrolled*
	AB 2308 Haney D	**Redevelopment: successor agency debt: City and County of San Francisco.** Authorizes extension of Net Tax Increment (NTI) pledge for formerly state-owned parcels around the Salesforce Transit Center.	*Enrolled*

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	SB 1167 Blakespear D Co-authors: Boerner D Connolly D Davies R Dahle R Dixon R Gonzalez D Grayson D Menjivar D Richardson D Sharp-Collins D Strickland R Wicks D Wiener D	**Vehicles: electric bicycles.** This bill would clarify and revise definitions for electric bicycles and other devices and make it unlawful to sell devices labeled as e-bikes if they do not meet that definition.	*Enrolled*
Support and Seek Amendments	SB 1246 Cortese D	**Autonomous vehicles.** This bill would implement an array of requirements for commercial autonomous vehicle (AV) operators related to remote driving and emergency response.	*Enrolled*
Support if Amended	AB 2276 Soria D Co-authors: Blanca Rubio D Gipson D Schiavo D Wiener D	**Vehicles: active intelligent speed assistance devices.** Establishes a 5-year pilot program in seven counties requiring drivers convicted of severe speeding-related offenses to install active Intelligent Speed Assistance (ISA) devices in their vehicles.	Dead
On Watch List	SB 1216 Laird D	**Budget Act of 2026** Contains provisions of the FY 2026/27 state budget trailer bill.	*Dead*

	SB 1411 Stern D Co-authors: Allen D Durazo D Gonzalez D	**Greenhouse Gas Reduction Fund: funding conditions: high-speed rail.** Allows the use of cap-and-invest funds for early works and projects developed through public and public-private partnership agreements outside the initial Merced to Bakersfield segment for activities that maximize the efficiency of delivering the California High-Speed Rail project.	Dead

[1]Under 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, and "Two Year Bill" means the bill didn't meet its statutory deadlines but is eligible to proceed in the second year of the two-year session.

Federal Bills

Adopted Positions / Monitoring Status	Bill # Author	Bill Title and Description	Update to Bill Status (as of 9/9/2026)
Support	H.R. 4376 Mullin (CA-15)	**AV Data Safety Act.** Requires the National Highway Traffic Safety Administration (NHTSA) to mandate the reporting of AV vehicle miles traveled, unplanned stoppages, and injuries involving human drivers, pedestrians, and bicyclists by AVs.	House Committee on Energy and Commerce
	S. 3742 Markey (MA)	**AV Data Safety Act.** Requires NHTSA to mandate the reporting of AV vehicle miles traveled, unplanned stoppages, and injuries involving human drivers, pedestrians, and bicyclists by AVs.	Senate Committee on Commerce, Science, and Transportation

SUPPLEMENTAL MATERIALS

- Attachment 1 – Resolution

San Francisco
County Transportation
Authority

BD091526 RESOLUTION NO. 27-XX

RESOLUTION ADOPTING A SUPPORT POSITION ON FEDERAL HOUSE OF REPRESENTATIVES 10033 (MULLIN (CA-15))

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 and federal legislative advocates, staff reviewed pending legislation for the current Legislative Sessions and analyzed it for consistency with the Transportation Authority's adopted advocacy principles and for impacts on transportation funding and program implementation in San Francisco and recommended adopting a support position on Federal House of Representatives (H.R.) 10033 (Mullin (CA-15)), as shown in Attachment 1; and

WHEREAS, At its September 15, 2026 meeting, the Board reviewed and discussed H.R. 10033 and approved the staff recommendation to adopt a support position on H.R. 10033; now, therefore, be it

RESOLVED, That the Transportation Authority hereby adopts a support position on H.R. 10033; and be it further

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

Attachment:

1. State and Federal Legislation – September 2026

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San Francisco
County Transportation
Authority

1455 Market Street, 22ND Floor, San Francisco, California 94103 415-522-4800 info@sfcta.org www.sfcta.org

Memorandum

AGENDA ITEM 6

DATE: September 10, 2026

TO: Transportation Authority Board

FROM: Carl Holmes – Deputy Director for Capital Projects
Anna LaForte – Deputy Director for Policy and Programming

SUBJECT: 9/15/2026 Board Meeting: Allocate $22,500,000 in Prop L Funds, with Conditions, to the Transbay Joint Powers Authority for The Portal Project Engineering Phase Activities Starting October 1, 2026, and Appropriate $3,500,000 in Prop L Funds, with Conditions, for The Portal Project Oversight, Engagement, and Work Program for Initiation of Pre-Construction

RECOMMENDATION ☐ Information ☒ Action

- Allocate $22,500,000 in Prop L Funds, with Conditions, to the Transbay Joint Powers Authority (TJPA) for The Portal Project Engineering Phase Activities Starting October 1, 2026
- Appropriate $3,500,000 in Prop L Funds, with Conditions, for The Portal Project Oversight, Engagement, and Work Program for Initiation of Pre-Construction

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

SUMMARY

The Portal project will extend Caltrain from its current terminus at Fourth and King streets to the Salesforce Transit Center and will also serve future California High-Speed Rail operations. TJPA is the lead agency for The Portal and is implementing the project in partnership with the Transportation Authority and other agencies, under the terms of a six-party memorandum of understanding (MOU). In May 2024, the Federal Transit Administration (FTA) approved TJPA's request to advance the project to the Engineering Phase of the FTA Capital Investment Grant (CIG) program. Among other activities, TJPA is currently advancing funding strategies, right-of-way acquisition, and project procurements, including for The Portal progressive-design-build (PDB/40-CT) contract, which will construct the project's tunnel and other heavy civil works. The Portal is a top regional and local rail capital priority, and TJPA is actively seeking state and local funds, to match a $3.38 billion federal commitment and complete the

San Francisco
County Transportation
Authority

project funding plan. TJPA has requested \$22.5 million in Prop L funds for continued Engineering Phase Activities starting October 1, 2026. The Transportation Authority conducts enhanced oversight of The Portal and engages with TJPA on risk management. We also actively participate as a key partner in the governance structure described in the MOU, while supporting San Francisco Board leadership. The Transportation Authority leads or co-leads certain project development tasks within The Portal's multi-agency work program, including funding strategy and ridership forecasting. We are seeking appropriation of \$3.5 million in Prop L funds to enable our continued oversight, engagement, and work program roles on the project.	

BACKGROUND

The Portal project (also known as the Downtown Rail Extension) consists of the construction of a rail subway extension from Caltrain's current terminus at Fourth and King streets to the Salesforce Transit Center in downtown San Francisco. The Portal will fully realize investments in the Transit Center, including the completed underground trainbox. The project will bring Caltrain into the heart of downtown San Francisco and will serve as a critical element of the first phase of the California High-Speed Rail project, linking the Bay Area to the Central Valley and Southern California. The Portal is also planned for compatibility with future rail expansion across the Bay. The project's current schedule, subject to completion of the funding plan, anticipates the start of Caltrain service on the project in 2036.

Project Governance. TJPA is the lead agency for The Portal, with responsibility for the development, environmental clearance, design, procurement, construction, and commissioning of the project. In December 2024, the Transportation Authority Board authorized execution of The Portal Project Implementation MOU among the major stakeholder agencies for The Portal: TJPA, Caltrain, California High-Speed Rail Authority (CHSRA), Metropolitan Transportation Commission (MTC), City and County of San Francisco (CCSF), and the Transportation Authority.

The MOU describes the administrative organizational structure, established by the TJPA Executive Director, for interagency staff-level coordination and engagement in support of project delivery. The Transportation Authority actively participates in this governance structure, including the Executive Working Group (EWG) consisting of executive staff and the Integrated Program Management Team (IPMT) consisting of senior technical staff.

Project Cost. In August 2023, the TJPA Board authorized submittal of the request to FTA to enter the project into the Engineering Phase of the CIG process. This submittal reflected an estimated capital cost for the project of \$8.25 billion, inclusive of the cost of the below-grade trainbox constructed as part of the Salesforce Transit Center.

In July 2025, the TJPA Board received an informational presentation that described an indicative update to the project's capital cost estimate. This indicative estimate of $7.57 billion reflected developments since the project's entry to the FTA Engineering Phase, including planned modifications to project configuration, updated escalation assumptions, and other adjustments.

FTA Process. At the time the project was advanced to the Engineering Phase of the FTA project development process in May 2024, the FTA established the CIG funding share of $3.38 billion. In order to secure these funds, TJPA must complete the requirements of the FTA Engineering Phase, including advancing design, securing third-party agreements, updating management plans, and numerous other activities. In particular, the project's capital funding gap must be closed, to demonstrate commitment of all non-CIG funds. Ultimately, FTA will commit CIG funds for the project through a Full Funding Grant Agreement (FFGA) to be executed between TJPA and FTA.

Project Funding. The FTA's funding share of $3.38 billion is the single largest source of funding for The Portal, and the project is a longstanding local and regional priority for funding from the CIG program. The Portal is San Francisco's top rail capital priority. In March 2025, MTC advanced the project to "Level 1" status in the region's Major Project Advancement Policy (MAP) framework.

The project has significant local and regional funding commitments, including from MTC and from a set of dedicated sources tied to land use development near the Salesforce Transit Center. Assuming the updated indicative cost estimate discussed above, the project's remaining funding need is approximately $2.2 billion. This figure is subject to adjustment, including to the extent that the TJPA Board modifies the project's target date for securing the project's FFGA with the FTA.

Of the remaining funding gap, approximately $1.3 billion is planned to come from state sources. In September 2025, state legislation was enacted to extend California's Cap-and-Invest greenhouse gas reduction program, which provides funding for high-speed rail and for the state's Transit Intercity Rail Capital Program (TIRCP), which are both major sources in The Portal's funding plan. On May 18, 2026, TJPA submitted a $750 million TIRCP application to the California State Transportation Agency (CalSTA). On May 27, 2026, MTC unanimously endorsed the project for the full $750 million TIRCP request submitted by TJPA.

On May 29, 2026, the California Air Resources Board (CARB) approved changes to the state's cap-and-invest program, which are expected to adversely impact funding availability for key programs funded by Cap-and-Invest revenues, including TIRCP and high-speed rail. The Transportation Authority joined numerous other agencies and organizations to advocate for the restoration of funding to programs affected by the recent CARB decision, but current Greenhouse Gas Reduction Fund legislative budget proposals for Tier 3 programs, including TIRCP, remain significantly lower than target levels.

Closing the funding gap will also require additional local funding. The state legislature recently passed AB 2308 (Haney), which would enable a 25-year extension to the Transbay Net Tax Increment district, in order to provide additional financing capacity to support The Portal's funding plan. This bill is now with the Governor for consideration. Other potential additional local funding sources include expanded development-based funding, tolling/pricing revenues, and other future capital funds.

Project Work Program. In concert with the development of the project's 6-party MOU in 2025, The Portal partner agencies prepared and agreed to a multi-year work program of activities in support of securing the FFGA and advancing the project, inclusive of FTA Engineering Phase requirements. As contemplated by the MOU, the work program is updated, to the extent needed, on an annual basis, with the most recent update prepared in Summer 2026. This work program includes advancing the project's construction contracts, including the heavy civil/tunnel 40-CT contract, as well as contracts for systems, station fit-out, and enabling works such as utility relocation. TJPA is also advancing the project's right-of-way (ROW) program in order to acquire property and property rights necessary for the construction and operation of the project.

Within the project's work program, the Transportation Authority is leading or co-leading certain tasks, working in partnership with TJPA and the other partner agencies. This work includes co-leading (with TJPA) the project's capital funding strategy and co-leading (with MTC) the continued development of the multi-agency governance framework contemplated in the MOU. We will be responsible for leading ridership forecasting efforts, at such time as FTA requires these forecasts to be updated in support of seeking the FFGA. We are also supporting the operations and maintenance (O&M) funding strategy task, including co-leading (with Caltrain) the analysis of potential fare charges for trips on the project.

40-CT Procurement and Pre-Construction. In October 2023, TJPA issued a Request for Qualifications (RFQ) for the 40-CT contract. In April 2024, TJPA identified the short-list of qualified teams identified through the RFQ process. In December 2025, the 40-CT procurement process was advanced to the Request for Proposals stage (RFP), with the RFP issued to the qualified short-list. The RFP has been followed by a number of addenda, and the RFP's updated schedule reflects a proposal deadline of September 25, 2026.

The TJPA Board is expected to consider awarding the 40-CT contract in early 2027. Following this milestone, the 40-CT pre-construction phase will be initiated, including advancing the project's design, cost, and pricing in collaboration with the design-build team.

DISCUSSION

Transportation Authority staff recommend the allocation of $22.5 million in Prop L funds to TJPA for continued advancement of The Portal project within the FTA Engineering Phase, specifically for an estimated 12-month period beginning October 1, 2026. We also recommend the appropriation of $3.5 million in Prop L funds to enable the Transportation Authority's continued enhanced oversight, staff-level governance engagement, and task roles within the project's multi-agency work program.

Attachment 1 summarizes the subject funding requests, including information on proposed leveraging of sales tax funds. Attachment 2 includes a brief description of the scopes of work for the two requests. Attachment 3 summarizes the staff recommendations for the Prop L requests, highlighting special conditions and other items of interest. Attachment 5 provides the Allocation Request Forms, with more detailed information on scope, schedule, budget, funding, deliverables, and special conditions, including the Transportation Authority's Enhanced Oversight Protocol for the project.

TJPA 3-Year Work Plan and Funding. The attached Allocation Request Form includes a three-year work plan describing TJPA's planned activities to progress The Portal from FY 2026/27 through FY 2028/29, consistent with the broader multi-agency work program described above. TJPA's 3-year work plan includes project development and pre-construction activities, procurement preparation, advancement of the right-of-way (ROW) program, funding and advocacy tasks, and completion of FTA Engineering Phase requirements, among other activities.

Excluding ROW expenditures, the estimated cost of TJPA's 3-year work plan is $358 million. ROW costs during this period are estimated at $255 million. Funding sources to support this work plan include: Prop L; CCSF Transbay Transit District sources, including Transbay Community Facilities District (CFD) funds; MTC Regional Measure 3 (RM3) funds; and remaining funds from a $60 million state TIRCP project development (TIRCP-PD) grant awarded to TJPA in 2023.

TJPA Prop L Request. TJPA has requested allocation of $22,500,000 in Prop L funds to support continued Engineering Phase activities for The Portal. This amount is less than the level of Prop L funding programmed in FY 2026/27 in the Caltrain Downtown Rail Extension and Pennsylvania Avenue Alignment 5-Year Prioritization Program, adopted by the Board in February 2024. Requested Prop L funds will be used for those activities described in the Allocation Request Form (Attachment 5), including tasks performed by Caltrain as part of The Portal's Integrated Project Delivery Team (IPDT) and tasks performed under TJPA's Program Management/Construction Management (PM/CM) contract.

Transportation Authority Oversight. The Portal is the largest single investment in the Prop L program, with $300 million programmed to the project in the Prop L Strategic Plan. Transportation Authority staff provide an enhanced level of oversight for The Portal project. This work is coordinated with the federal oversight provided by the FTA and its Project Management Oversight Consultant (PMOC). This oversight is in addition to our participation in the multi-agency governance bodies described in the six-agency Implementation MOU. Our enhanced oversight is conducted on behalf of both the Transportation Authority and CCSF, which has also invested significantly in the Transbay Program since its inception, and whose leadership on the TJPA we support through regular staff briefings.

Parameters for our oversight are described in the Enhanced Oversight Protocol included in Attachment 5. In consultation with TJPA, we substantially revised the Oversight Protocol in early 2026, in conjunction with the immediate previous Prop L allocation for the project approved in February 2026. The protocol and recommended conditions of allocation reflect project risks related to funding uncertainty, increasing program management complexity, and organizational capacity. TJPA and Transportation Authority staff continue to hold risk management reviews and workshops, and TJPA plans to conduct upcoming organizational/peer reviews by third parties.

Appropriation Request. Our oversight and work program activities for The Portal have been funded by sales tax funds since April 2020, most recently with an appropriation of $3.3 million in Prop K funds approved in March 2023.

We are requesting appropriation of $3.5 million in Prop L funds to enable our continued enhanced oversight, staff-level engagement in MOU governance bodies, and work program activities over an approximately 24-month period. Under the current project schedule, this period is anticipated to coincide with the initiation of the 40-CT pre-construction phase, including completion of the 30% design validation stage and substantial advancement of the 60% design stage. We also anticipate the initiation of regular meetings of the project's staff-level Change Control Board, establishment of The Portal Committee of the TJPA Board, actions at the San Francisco Board of Supervisors, advancement of the TJPA/Caltrain Master Cooperative Agreement (MCA), and coordination with MTC and San Francisco's state and federal legislative delegations throughout this period.

Prop L 5-Year Prioritization Program (5YPP) Amendment. The Caltrain Downtown Rail Extension and Pennsylvania Avenue Alignment 5YPP includes $65 million in Prop L funds programmed to TJPA in FY 2026/27 for The Portal. Our request for an appropriation of $3.5 million in Prop L funds for The Portal Project Oversight, Engagement, and Work Program for Initiation of Pre-Construction includes a 5YPP amendment to reprogram $3.5 million in Prop L funds from TJPA to the Transportation Authority for our ongoing project oversight and work program, as described in the attached allocation request form (Attachment 5). We will revisit overall programming to the project as part of future updates to the Prop L Strategic Plan and 5YPPs, which will incorporate updated assumptions including revenue forecasts and financing. The next Prop L Strategic Plan and 5YPP updates are planned to be developed and brought forward for Board consideration in Spring 2028.

FINANCIAL IMPACT

The recommended action would allocate $22.5 million and appropriate $3.5 million in Prop L funds, with conditions. The allocation and appropriation would be subject to the Fiscal Year Cash Flow Distribution Schedules contained in the attached Allocation Request Forms.

Attachment 4 shows the approved FY 2026/27 allocations and appropriations to date, with associated annual cash flow commitments as well as the recommended allocation, appropriation, and cash flow amounts that are the subject of this memorandum.

Sufficient funds are included in the FY 2026/27 budget to accommodate the recommended actions. Furthermore, sufficient funds will be included in future year budgets to cover the recommended cash flow distribution for those respective fiscal years.

CAC POSITION

The CAC considered this item at its September 9, 2026, meeting and unanimously adopted a motion of support for the staff recommendation.

SUPPLEMENTAL MATERIALS

- Attachment 1 – Summary of Requests Received
- Attachment 2 – Project Descriptions
- Attachment 3 – Staff Recommendations
- Attachment 4 – Prop L Allocation Summary: FY 2026/27
- Attachment 5 – Allocation Request Forms (2)
- Attachment 6 - Resolution

Attachment 1: Summary of Requests Received

Source	EP Line No./ Program [1]	Project Sponsor [2]	Project Name	Current Prop L Request	Total Cost for Requested Phase(s)	Leveraging: Expected Leveraging by EP Line [3]	Leveraging: Actual Leveraging by Project Phase(s)[4]	Phase(s) Requested	District(s)
Prop L	5	TJPA	The Portal Project Engineering Phase Activities Starting October 1, 2026	$ 22,500,000	$ 583,963,000	94%	85%; overall leveraging exceeds 96% for the project	Design	Citywide, District 6
Prop L	5	SFCTA	The Portal - Oversight, Engagement, and Work Program for Initiation of Pre-Construction	$ 3,500,000	$ 3,500,000	94%	0%	Design	Citywide, District 6
			TOTAL	**$ 26,000,000**	**$ 587,463,000**				

Footnotes

[1] "EP Line No./Program" is the Prop L Expenditure Plan line number referenced in the Prop L Strategic Plan (e.g. Caltrain Downtown Extension and Pennsylvania Avenue Alignment).

[2] Acronyms: TJPA (Transbay Joint Powers Authority) and SFCTA (San Francisco County Transportation Authority).

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

[4] "Actual Leveraging by Project Phase" is calculated by dividing the total non-Prop L, 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 L 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./ Program	Project Sponsor	Project Name	Prop L Funds Requested	Project Description
5	TJPA	The Portal Project Engineering Phase Activities Starting October 1, 2026	$22,500,000	The Portal (Downtown Extension or DTX) project will extend Caltrain 1.3 miles from its current terminus at Fourth and King streets to the Salesforce Transit Center at First and Mission streets, with accommodations for future high-speed rail. Requested funds will fund: a portion of Program Management Construction Management (PMCM) contract activities, including program management, project management, construction support servies, project delivery, contract document development, project controls, cost estimating, configuration management, and community outreach; and the full scope of services provided by Caltrain in support of The Portal during this period, per the interagency agreement between TJPA and Caltrain, including program management and delivery, procurement document development, engineering and design, planning support, agency and regulatory coordination, third-party agreement development and coordination, and communications and public relations. The Portal/DTX project is planned to open for revenue service in 2036, subject to funding availability.
5	SFCTA	The Portal - Oversight, Engagement, and Work Program for Initiation of Pre-Construction	$3,500,000	Requested funds will be used for project management, engagement, and coordination, including active participation in the project's 6-agency governance bodies; enhanced oversight of the project consistent with the Enhanced Oversight Protocol; and SFCTA tasks in The Portal project work program, including lead and co-lead efforts (e.g. co-lead with TJPA the project's capital funding strategy, co-lead with Caltrain the analysis of potential fare charges for trips on the project), through Fall 2028.

[1] See Attachment 1 for footnotes.

Attachment 3: Staff Recommendations[1]

EP Line No./ Program	Project Sponsor	Project Name	Prop L Funds Recommended	Recommendations
5	TJPA	The Portal Project Engineering Phase Activities Starting October 1, 2026	$ 22,500,000	**Special conditions:** Allocation is conditioned on ongoing compliance with the SFCTA Enhanced Oversight Protocol for The Portal (attached to allocation request form). Allocation is conditioned on program readiness to onboard the 40-CT contractor, to be formalized by the TJPA through the Stage Gate process prior to 40-CT contract award (planned February 2027) potentially informed by other reviews (e.g. APTA), including schedule and cost, funding, resources, governance, and program integration activities for interface management impacted by contracts. TJPA shall complete remaining governance implementation milestones, prior to 40-CT contract award including: establishment of The Portal Committee; completion of the Change Control Board (CCB) Charter and related Change Management Plan; and completion of Integrated Management Team (IMT) parameters. IPMT and EWG shall be given reasonable and sufficient time for review and consideration of the CCB Charter and Change Management Plan, with executive approval consistent with governance agreements. On an annual basis, TJPA will consult with SFCTA staff regarding the project's work program, budget/funding, and schedule; TJPA will meet-and-confer on these topics with SFCTA prior to bringing forward the recommended Summary Work Program to the IPMT/IMT and EWG, as described in The Portal Project Implementation MOU, and at a minimum prior to adoption of the agency's annual budget. TJPA shall regularly maintain the Work Program look-ahead for IPMT/IMT and EWG. Prior to any “major change”, SFCTA shall be informed and/or consulted by TJPA in advance of decision-making following the IPMT/IMT and EWG process. TJPA, Caltrain, and SFCTA shall continue to jointly develop the project's O&M funding strategy, including work to assess options for the attribution of project revenues and project costs, as part of Master of Cooperative Agreement between TJPA and Caltrain, supported when needed by executive engagement among the 3 agencies. Presentations on The Portal project will be calendared periodically on the SFCTA Board and/or SFCTA CAC meeting agendas, at the discretion of the SFCTA Board Chair. TJPA staff shall be in attendance to present or answer questions from Board/CAC members, if requested.
5	SFCTA	The Portal - Oversight, Engagement, and Work Program for Initiation of Pre-Construction	$ 3,500,000	**Special conditions:** The recommended allocation is contingent upon amendment of the Caltrain Downtown Extension and Pennsylvania Avenue Alignment 5YPP to program funds for this request. See attached 5YPP amendment for details.
		TOTAL	**$ 26,000,000**	

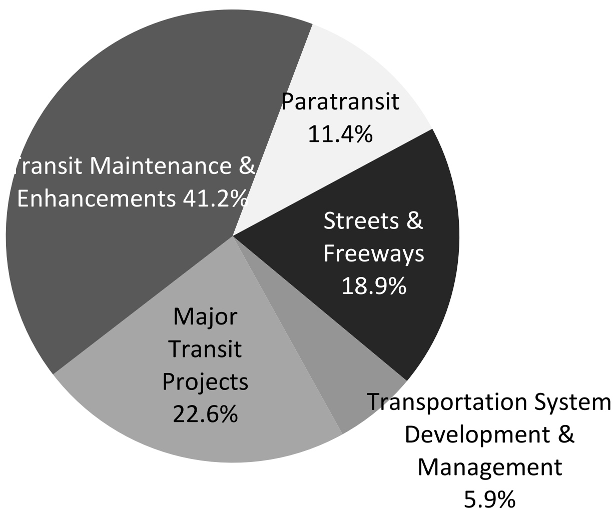
[1] See Attachment 1 for footnotes.

Attachment 4.
Prop L Summary - FY2026/27

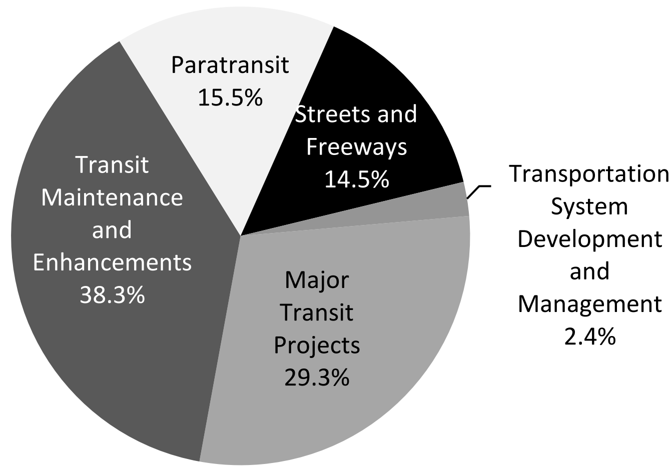
PROP L SALES TAX						
FY 2026/27	**Total**	**FY 2026/27**	**FY 2027/28**	**FY 2028/29**	**FY 2029/30**	**FY2030/31**
Prior Allocations	$ 26,061,700	$ 13,707,000	$ 10,954,700	$ 1,400,000	$ -	$ -
Current Request(s)	$ 26,000,000	$ 17,725,000	$ 8,025,000	$ 250,000	$ -	$ -
New Total Allocations	$ 52,061,700	$ 31,432,000	$ 18,979,700	$ 1,650,000	$ -	$ -

The above table shows maximum annual cash flow for all FY 2026/27 allocations and appropriations approved to date, along with the current recommended allocations and appropriation.

Prop L Expenditure Plan



Prop L Investments To Date (Including Pending Allocations)



Attachment 5

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project Engineering Phase Activities Starting October 1, 2026
Primary Sponsor:	Transbay Joint Powers Authority

EXPENDITURE PLAN INFORMATION

PROP L Expenditure Plans	Caltrain Downtown Rail Extension and Pennsylvania Alignment
Current PROP L Request:	$22,500,000
Supervisorial Districts	Citywide, District 06

REQUEST

Brief Project Description

Extension of Caltrain 1.3 miles from Fourth and King Street to the Salesforce Transit Center at First and Mission Streets, with accommodations for future high-speed rail.

Detailed Scope, Project Benefits and Community Outreach

TJPA seeks an allocation of $22.5 million in Prop L funding for the period of October 1, 2026, through September 30, 2027, to support: 1) a portion of the Program Management/Construction Management (PMCM) contract activities, including program management, project management, construction support services, project delivery, contract document development, project controls, cost estimating, configuration management, and community outreach; and 2) the full scope of services provided by Caltrain in support of The Portal during this period, per the interagency agreement between TJPA and Caltrain, including program management and delivery, procurement document development, engineering and design, planning support, agency and regulatory coordination, third-party agreement development and coordination, and communications and public relations.

The cost information provided in this application is based on the current TJPA Board-adopted project cost estimate and does not reflect estimated changes presented to the TJPA Board as an indicative cost estimate in July 2025.

Project Location

Fourth and Townsend Streets to the Salesforce Transit Center at First and Mission Streets

Is this project in an Equity Priority Community?	No
Does this project benefit disadvantaged populations?	Yes

Project Phase(s)

Design Engineering (PS&E)

5YPP/STRATEGIC PLAN INFORMATION

Type of Project in the Prop L 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 L Amount	$22,500,000.00

San Francisco County Transportation Authority
Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project Engineering Phase Activities Starting October 1, 2026
Primary Sponsor:	Transbay Joint Powers Authority

ENVIRONMENTAL CLEARANCE

Environmental Type:	EIR/EIS

PROJECT DELIVERY MILESTONES

Phase	Start		End	
	Quarter	Calendar Year	Quarter	Calendar Year
Planning/Conceptual Engineering (PLAN)				
Environmental Studies (PA&ED)			Oct-Nov-Dec	2019
Right of Way	Apr-May-Jun	2022	Apr-May-Jun	2029
Design Engineering (PS&E)	Oct-Nov-Dec	2021	Jan-Feb-Mar	2029
Advertise Construction	Oct-Nov-Dec	2023		
Start Construction (e.g. Award Contract)	Apr-May-Jun	2029		
Operations (OP)				
Open for Use			Jul-Aug-Sep	2036
Project Completion (means last eligible expenditure)			Oct-Nov-Dec	2037

SCHEDULE DETAILS

The above schedule information reflects updated Master Schedule prepared by TJPA staff in June 2026. The Master Schedule reflects Progressive Design-Build (PDB) procurement approach for the general civil and tunnel contract package, Construction Manager/General Contractor (CMGC) procurement approach for Station Fit-out and Track & Rail Systems contract packages, and Design-Bid-Build (DBB) procurement approach for the advanced works packages for the project. Design Engineering dates in above table reflect design activities through start of Civil & Tunnel construction. Dates for advertisement and contract award are for the PDB contract and authorization for start of Civil & Tunnel construction. The Portal schedule dates are subject to funding availability to proceed to successive project phases. TJPA continues to work with all relevant San Francisco agencies, rail operators, and other stakeholders regarding project coordination throughout The Portal alignment.

San Francisco County Transportation Authority
Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project Engineering Phase Activities Starting October 1, 2026
Primary Sponsor:	Transbay Joint Powers Authority

FUNDING PLAN - FOR CURRENT REQUEST

Fund Source	Planned	Programmed	Allocated	Project Total
PROP L EP-205: Caltrain Downtown Rail Extension and Pennsylvania Alignment	$0	$43,545,000	$21,500,000	$65,045,000
Federal Non-CIG and Other Planned Funds	$25,499,000	$0	$0	$25,499,000
Prop K	$0	$0	$21,500,000	$21,500,000
Rail Operator Contributions	$0	$3,000,000	$3,000,000	$6,000,000
Regional Measure 3	$0	$69,637,000	$0	$69,637,000
State Cap-and-Invest (TIRCP, HSR)	$100,000,000	$0	$0	$100,000,000
TIRCP Project Development	$0	$0	$60,000,000	$60,000,000
Transit Center District Funds	$66,821,000	$0	$169,461,000	$236,282,000
Phases In Current Request Total:	$192,320,000	$116,182,000	$275,461,000	$583,963,000

FUNDING PLAN - ENTIRE PROJECT (ALL PHASES)

Fund Source	Planned	Programmed	Allocated	Project Total
PROP L	$0	$278,500,000	$21,500,000	$300,000,000
Federal CIG Grant	$3,384,000,000	$0	$0	$3,384,000,000
Federal Non-CIG and Other Planned Funds	$1,380,700,000	$0	$0	$1,380,700,000
FRA ARRA + Local Match (Trainbox)	$0	$0	$728,500,000	$728,500,000
Plan Area Funds (e.g., Central SOMA)	$155,000,000	$0	$0	$155,000,000
Prop K	$0	$0	$21,500,000	$21,500,000
Rail Operator Contributions	$0	$3,000,000	$3,000,000	$6,000,000
Regional Measure 3	$0	$224,300,000	$100,700,000	$325,000,000
RTIP Fund Exchange	$0	$17,800,000	$0	$17,800,000
State Cap-and-Invest (TIRCP, HSR)	$1,300,000,000	$0	$0	$1,300,000,000

TIRCP Project Development	$0	$0	$60,000,000	$60,000,000
Transit Center District Funds	$288,039,000	$0	$169,461,000	$457,500,000
Transit District Net Tax Increment	$110,000,000	$0	$0	$110,000,000
Funding Plan for Entire Project Total:	$6,617,739,000	$523,600,000	$1,104,661,000	$8,246,000,000

COST SUMMARY

Phase	Total Cost	PROP L - Current Request	Source of Cost Estimate
Planning/Conceptual Engineering	$0		
Environmental Studies	$0		
Right of Way	$351,641,000		TJPA Cost Estimate
Design Engineering	$583,963,000	$22,500,000	TJPA Cost Estimate
Construction	$7,310,396,000		TJPA Cost Estimate
Operations	$0		
Total:	$8,246,000,000	$22,500,000	

% Complete of Design:	30.0%
As of Date:	07/24/2026
Expected Useful Life:	70 Years

San Francisco County Transportation Authority
Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project Engineering Phase Activities Starting October 1, 2026
Primary Sponsor:	Transbay Joint Powers Authority

SFCTA RECOMMENDATION

Resolution Number:		**Resolution Date:**	
Total PROP L Requested:	$22,500,000	**Total PROP L Recommended**	$22,500,000

SGA Project Number:		**Name:**	The Portal Project Engineering Phase Activities
Sponsor:	Transbay Joint Powers Authority	**Expiration Date:**	09/30/2029
Phase:	Design Engineering	**Fundshare:**	11.14%

Cash Flow Distribution Schedule by Fiscal Year

Fund Source	FY2026/27	FY2027/28	Total
PROP L EP-205	$16,225,000	$6,275,000	$22,500,000

Deliverables

1. TJPA shall submit a Monthly Report through SFCTA's grants portal. The Monthly Report shall be prepared consistent with the requirements of the SFCTA Enhanced Oversight Protocol and the Standard Grant Agreement.

2. On a quarterly basis, TJPA shall provide a forecast of future project expenditures, broken down by detailed project Work Breakdown Structure (WBS) / Standard Cost Category (SCC) codes. This forecast shall be accompanied by a sources-and-uses of funding breakdown at the category/cost center level.

3. Upon completion of each associated task/sub-task, TJPA shall provide the deliverables in the attached PMCM Scope Deliverables Compliance Checklist.

4. Upon completion of the associated task(s), TJPA shall provide the following deliverables: Concept of Operations (prepared by Caltrain); and Track and Systems engineering and design consultant RFP package.

Special Conditions

1. Allocation is conditioned on ongoing compliance with the attached SFCTA Enhanced Oversight Protocol for The Portal.

2. Allocation is conditioned on program readiness to onboard the 40-CT contractor, to be formalized by the TJPA through the Stage Gate process prior to 40-CT contract award (planned February 2027) potentially informed by other reviews (e.g. APTA), including schedule and cost, funding, resources, governance, and program integration activities for interface management impacted by contracts

3. TJPA shall complete remaining governance implementation milestones, prior to 40-CT contract award, including: establishment of The Portal Committee; completion of the Change Control Board (CCB) Charter and related Change Management Plan; and completion of Integrated Management Team (IMT) parameters. IPMT and EWG shall be given reasonable and sufficient time for review and consideration of the CCB Charter and Change Management Plan, with executive approval consistent with governance agreements.

4. On an annual basis, TJPA will consult with SFCTA staff regarding the project's work program, budget/funding, and schedule; TJPA will meet-and-confer on these topics with SFCTA prior to bringing forward the recommended Summary Work Program to the IPMT/IMT and EWG, as described in The Portal Project Implementation MOU, and at a minimum prior to adoption of the agency's annual budget. TJPA shall regularly maintain the Work Program look-ahead for IPMT/IMT and EWG. Prior to any "major change", SFCTA shall be informed and/or consulted by TJPA in advance of decision-making following the IPMT/IMT and EWG process.
5. TJPA, Caltrain, and SFCTA shall continue to jointly develop the project's O&M funding strategy, including work to assess options for the attribution of project revenues and project costs, as part of Master of Cooperative Agreement between TJPA and Caltrain, supported when needed by executive engagement among the three (3) agencies.
6. Presentations on The Portal project will be calendared periodically on the SFCTA Board and/or SFCTA CAC meeting agendas, at the discretion of the SFCTA Board Chair. TJPA staff shall be in attendance to present or answer questions from Board/CAC members, if requested.

Metric	PROP AA	TNC TAX	PROP L
Actual Leveraging - Current Request	No PROP AA	No TNC TAX	85.18%
Actual Leveraging - This Project	No PROP AA	No TNC TAX	96.10%

San Francisco County Transportation Authority
Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project Engineering Phase Activities Starting October 1, 2026
Primary Sponsor:	Transbay Joint Powers Authority

EXPENDITURE PLAN SUMMARY

Current PROP L Request:	$22,500,000

1) The requested sales tax and/or vehicle registration fee revenues will be used to supplement and under no circumstance replace existing local revenues used for transportation purposes.

Initials of sponsor staff member verifying the above statement:

CONTACT INFORMATION

	Project Manager	Grants Manager
Name:	Alfonso Rodriguez	Mary Pryor
Title:	DTX Project Director	Financial Consultant
Phone:	(415) 597-4620	(415) 896-6945
Email:	arodriguez@tjpa.org	mary@nwcpartners.com

The Portal, 3-Year Funding Plan
As of 7/24/2026

Cost Category	Sub Category	Portal Scope of Work Tasks	Fund Source	FY 26-27	FY 27-28	FY 28-29	Total
Project Management	TJPA	1.1	CFD	4,008,000	4,288,000	4,589,000	12,885,000
	PMCM & GEC	1.2	CFD	0	6,729,000	1,547,500	8,276,500
			Prior Year Prop L	2,523,000	0	0	2,523,000
			Prop L	8,897,000	6,355,500	13,452,500	28,705,000
Design Engineering	Engineering and Design Services	2	TIRCP Cycle 8	1,144,000	13,810,000	51,195,000	66,149,000
			CFD	0	1,800,000	36,476,000	38,276,000
			Prior Year Prop L	2,858,000	0	0	2,858,000
			Prop L	4,604,000	9,432,000	1,350,000	15,386,000
			RM3	27,355,000	35,580,000	6,702,000	69,637,000
			TIRCP	1,588,000	41,037,000	0	42,625,000
Interagency Coordination	Caltrain	3.1	CFD	0	3,095,000	4,910,000	8,005,000
			Prior Year Prop L	856,000	0	0	856,000
			Prop L	2,724,000	940,000	1,165,000	4,829,000
			TIRCP Cycle 8	0	7,685,000	7,835,000	15,520,000
	City and County of San Francisco	3.2	CFD	950,000	1,381,000	1,135,500	3,466,500
Professional Services		4	CFD	2,288,000	2,357,000	2,428,000	7,073,000
Right-of-Way Acquisition, Relocation, & Professional Services		5	RM3	84,590,000	86,475,000	84,052,000	255,117,000
Construction		6	TIRCP Cycle 8	0	11,998,000	6,333,000	18,331,000
			Prop L	0	1,680,000	1,900,000	3,580,000
			CFD	40,000	1,693,000	7,377,000	9,110,000
Grand Total				**144,425,000**	**236,335,500**	**232,447,500**	**613,208,000**

Prop L Funded Activities for October 1, 2026 through September 30, 2027		
Task	Scope	Prop L Total
Program Management Construction Management		
Task 1	Program Management	$7,338,000
Task 2	Project Management	$2,136,000
Task 3	Construction Management and Construction Support Services	$1,911,000
Task 4	Project Delivery and Contract Development/Compliance	$664,000
Task 5	Configuration Management	$1,133,000
Task 6	Project Controls	$2,499,000
Task 7	Estimating	$1,887,000
Task 8	Community Outreach & Construction Relations	$809,000
	Other Direct Costs	$460,000
PMCM Team Subtotal		$18,837,000
Caltrain		
Task 1	Procurement Document Development/Contractor Engagement	$763,000
Task 2	Engineering and Design/Planning Support	$880,000
Task 3	Agency and Regulatory Coordination	$73,000
Task 4	MCA or/and 4KY Interim Agreements Development/Negotiation	$505,000
Task 5	4KY Delivery	$0
Task 6	The Portal Program Management and Delivery	$959,000
Task 7	Communications, Public Relations	$53,000
	Other Direct Costs	$430,000
Caltrain Team subtotal		$3,663,000
	Total	$22,500,000

The Portal Scope of Work through FY 2027-29 for Prop L Allocation Request (Subject to Funding Availability)

The Scope of Work described in this document is subject to funding availability. On August 26, 2025, the Federal Railroad Administration (FRA) withdrew the CRISI award of $24,6550,000 for Track and Rail Systems Design, which leaves this scope only partially funded, supported solely by the local funds originally pledged as the federal match. In FY 2025-26, the IPDT assessed the available funding and revised the near-term scope of work to focus on de-risking the project with durable work activities. As a result, the focus has been on advancing the procurement for the 40-CT Civil and Tunnel contract through procurement and into preconstruction award in early CY 2027, advancing utility relocation design and the associated design-bid-build contract and general conditions, and building project delivery capacity through strategic on-ramping of experienced project delivery staff.

1 PROJECT MANAGEMENT

1.1 Transbay Joint Powers Authority

In April 2001, the City and County of San Francisco (the City), the Alameda-Contra Costa Transit District, and the Peninsula Corridor Joint Powers Board (Caltrain) executed a Joint Powers Agreement under state law, creating the Transbay Joint Powers Authority (TJPA) for the purpose of planning, building, and operating the Transbay Program's facilities, including a new transit terminal (the Salesforce Transit Center) and the extension of Caltrain into the Center (The Portal). The TJPA was granted "primary jurisdiction with respect to all matters pertaining to the financing, design, development, construction, and operation of the new terminal" (see California Public Resources Code Section 5027.1(a)). The TJPA is responsible for ensuring that the final design, construction, testing, and startup phases of the Program conform to design criteria and are executed in accordance with established schedules, budgets, and agreements with the U.S. Department of Transportation's operating administrations and other funding partners.

1.1.1 Funding and Advocacy

Developing the funding plan for The Portal and securing the necessary commitments from funding partners is paramount for the project's success. This work includes:

- Integrating planning and funding for The Portal with the broader regional, megaregional, and statewide plans and funding programs.
- Working with funding agencies to secure funding commitments, including drafting materials for planning and programming documents, preparing and submitting grant applications, and negotiating with funding agencies for specific funding allocations.
- Identifying new funding sources and developing projections of funding availability.
- Engaging with financial advisors to integrate future funding streams into the project's schedule.
- Coordinating with agency partners to prioritize the project in local and regional funding advocacy efforts.
- Developing and implementing a funding campaign to secure public and private funds.

Working with local and state partner agencies, TJPA will advance a multi-pronged effort to complete the non-Federal Transit Administration (FTA) Capital Investment Grant (CIG) funds needed to unlock those federal dollars. Among the funding opportunities that may be sought are discretionary funds from the Cap and Invest program, Greenhouse Gas Reduction funds as a multi-year award from the same program, extension of the term of the Transbay Redevelopment Plan, commitment of the regional transit funding in the Central SOMA Implementation Strategy to The Portal, among others to be developed. In addition, TJPA and the agency partners will explore support for regional transportation funding mechanisms as well as a statewide program to support transit operations and maintenance funding.

In addition to in-house staff, the TJPA manages a team of consultants with advocacy and finance expertise to conduct this work.

1.1.2 Governance

The TJPA is responsible for managing the governance of The Portal, including implementation of The Portal Governance Blueprint, The Portal Project Implementation Memorandum of Understanding (Implementation MOU), and The Portal Project Administrative Management Agreement (Management Agreement).

The TJPA will continue implementation of the MOU Engineering Phase Work Plan Task 5, Governance Blueprint Implementation. The TJPA, in collaboration with the agency partners, has implemented the following governance-related actions:

- Working with agency partners, the TJPA has made significant progress in establishing a Change Control Board (CCB) charter for The Portal. Work will continue through the summer of 2026.
- The Integrated Program Delivery Team (IPDT) has been initiated including a combined staff comprised of TJPA, Caltrain, and the Program Management/ Construction Management consulting team.
- Documented Stage Gate compliance for the 40-CT Civil and Tunnel progressive design-build (PDB) contract RFP, released to the short-list on December 19, 2025.
- The TJPA has updated the work plan in draft form in support of the agency partners annual budget process, expected to be complete in April 2026.

Going forward, the TJPA will further:

- Hold and manage regular meetings of the CCB to be convened near to but before the commencement of construction.
- Transition from the Integrated Program Management Team (IPMT) to the Integrated Management Team (IMT).
- Establish The Portal Board Committee.

1.1.3 Contract Management

TJPA staff oversees a consultant team that includes program managers, designers, construction managers, security contractors, and others according to the needs of the project. Staff oversees the day-to-day management of design and construction, including all aspects of the work of technical and design consultants, project controls, and project coordination; stakeholder coordination; risk management; budgeting; procurement management; staffing; and construction contracts and claims resolution.

1.1.4 Administration

The TJPA's salaries, benefits, and administrative expenses for The Portal are allocated between the operations and The Portal operating budgets based on the job description for each staff position.

Currently, four positions are fully dedicated to The Portal. Staff positions that serve agency-wide functions, such as executive and finance staff, are split evenly between The Portal and operations budgets.

1.2 Program Management/Construction Management

A consultant Program Management/Construction Management (PMCM) team functions as an extension of the TJPA's staff to assist in the delivery of The Portal. The PMCM team's scope of work includes:

- Project management
- Engineering management
- Construction management and construction support
- Project delivery and contract development/compliance
- Configuration management
- Project controls
- Estimating
- Community outreach and construction relations
- Funding advocacy, grant writing, and financial and progress reporting

The specific work plan through FY28-29 is described in the following subsections.

1.2.1 Cost Mitigation

PMCM staff will conduct one or more facilitated value engineering workshops to identify potential cost reductions project-wide. The next workshops will take place in CY 2027 with the onboarding of the new general engineering consultant (GEC) and 40-CT PDB contractor, subject to appropriate ramp-up by both teams. Workshops will include members from the IPMT (composed of technical experts from the TJPA's agency partners), IPDT in brainstorming and evaluating cost reduction concepts, in collaboration with the PDB contractor for the 40-CT contract during the preconstruction phase. Workshops will consider capital cost, life cycle cost, passenger experience, and operational constraints or opportunities.

In addition to the formal value engineering workshops, PMCM staff will continuously evaluate cost reduction secondary mitigation opportunities through stakeholder engagement, preconstruction concepts offered by the 40-CT contractor, and changing technology or third-party interests.

Deliverables:

- Value engineering report with recommendations for cost-saving alternatives. Continuing analysis of current project costs and identification of cost drivers.
- Detailed cost reduction secondary mitigation memoranda, including implementation roadmap and risk mitigation strategies for discussion with stakeholders and consideration of adoption in accordance with configuration management procedures.

1.2.2 Project Management Tools Development

- Cost and Budget. Costs will be continuously monitored as design progresses. Additionally, following required environmental approvals, cost saving secondary mitigations will be integrated into the project budget. As such changes are developed, analyzed, and approved, changes to the New Starts Engineering phase cost estimate will be documented and tracked. After the FTA's risk workshop, to be conducted during FTA's Readiness Assessment once TJPA requests a Full Funding Grant Agreement (FFGA), the Engineering phase cost estimate will be converted to a baseline cost estimate and budget and presented to the TJPA Board of Directors for approval.

As preconstruction and construction contracts are awarded, actual vs. planned costs will be documented and, when necessary, trended against the contingency drawdown plan and baseline budget.

- Schedule. Updates are prepared monthly, comparing progress against the adopted Master Schedule for all activities. The critical and near-critical path will be identified and tracked. Variances for critical and near-critical activities in excess of 10 working days will be explained, and mitigating actions identified and tracked. After the FTA's risk workshop associated with the TJPA's FFGA application, the Master Schedule will be converted to a baseline schedule and presented to the TJPA Board of Directors for approval.
- Configuration. Proposed changes will be analyzed for feasibility and safety, operational, cost, schedule, and environmental impacts. Technical memoranda will be prepared for review and discussion by the IPDT, and recommendations for disposition taken to the Configuration Management Working Group (CMWG), Change Control Board (CCB), Executive Working Group (EWG), and TJPA Board of Directors, as appropriate. If approved, any required environmental documentation will be prepared in accordance with the relevant state and federal requirements.
- Risk. Quarterly workshops, working through the IPMT and the successor Integrated Management Team (IMT), will be continued. Risk workshops may consider The Portal overall or be focused on a particular body of potential risks, as identified by the IPDT and agency partners. Risks will be evaluated for severity and probability using the FTA OP40 protocol. Mitigative actions will be identified, assigned, and tracked for effectiveness. An annual contingency review will be conducted using a Monte Carlo analysis to evaluate the contingency values assigned to categories of risk, or more frequently in the event of a significant risk event.
- Project Report. A monthly status report will be prepared to meet the FTA requirements and the provisions of the Implementation MOU and Management Agreement. The monthly report will be provided to governance bodies, as required and appropriate.
- Policy Baseline Documents. The TJPA will compile and bring forward the set of policy baseline documents, using, as appropriate, other project deliverables and baseline documents. The Policy Baseline Documents will be reviewed and approved consistent with the provisions of The Portal Governance Blueprint and Implementation MOU. The TJPA will maintain and update the Policy Baseline Documents as needed. The TJPA Board of Directors holds approval authority for the Policy Baseline Documents.

Deliverables:

- Updated capital cost estimate in Standard Cost Categories format, when applicable
- Updated schedule along with monthly updates and schedule narrative
- As-needed technical analysis and associated rough-order-of-magnitude cost estimates for candidate configuration changes
- Quarterly risk memoranda with mitigation plan status. Annual contingency review using Monte Carlo-based simulations
- Quarterly contingency management reports
- Monthly reports (ongoing)
- Approved Policy Baseline Documents

1.2.3 FTA Engineering Phase Activities/Requirements

The TJPA will continue updating the following plans and procedures using FTA oversight procedures, FTA Project Management Oversight reporting, and sound project management practices. The TJPA will engage Caltrain and other partners on tasks as applicable.

- The following plans and procedures are complete:
- Fleet Management Plan
- Risk and Contingency Management Plan
- Engagement and Community Outreach Management Plan
- Document Control and Records Management Plan
- Quality Management Plan
- Real Estate Acquisition Management Plan
- Safety and Security Management Plan
- Before and After Study Plan
- Digital Delivery Management Plan
- Revised Relocation Plan

- The following plans, procedures and reports will be advanced:
- Safety Plan
- Schedule Control Procedure
- Third Party Agreements Plan and agreements
- Travel Forecast Results Report
- Work breakdown structure
- Environmental documentation for configuration changes
- Quantitative risk assessment and Project Management Oversight Contractor (PMOC) readiness review
- Federal Transit Administration-compliant 20-Year Financial Plan
- FTA rating package
- FFGA preparation/negotiation
- Update the 20-Year Financial Plan, in support of the FFGA request and to reflect outcomes of the FTA Risk Review, revisions to the funding plan, and other information.
- Update ridership forecasts, as required, for the updated 20-Year Financial Plan and FTA rating package, as part of the request for the FFGA.
- Conduct the FTA’s quantitative risk review process as an input to the updated capital cost estimate, PMOC’s readiness review, etc.
- Prepare and submit the FFGA request and all required documentation; facilitate the FTA and PMOC’s process and engagement during the FTA review period.
- Complete all critical third-party agreements required to request the FFGA, as identified in the Third-Party Agreements Plan; these include master cooperative agreements between the TJPA and Caltrain and between the TJPA and the California High-Speed Rail Authority.

Deliverables:

- Updated plans, procedures, and reports accepted by the FTA as sufficient to support an FFGA application:
- FTA rating package
- 20-Year Financial Plan
- FTA risk review and qualitative risk assessment
- FFGA request submittal
- Executed critical third-party agreements
- Conduct training for all project staff to ensure adherence to the plans and procedures relevant to their responsibilities
- Conduct regular audits to ensure compliance

2 DESIGN ENGINEERING

2.1 Enabling Works Design

2.1.1 Utility Relocation

The utility relocation contract (10-UR) is a design-bid-build contract that will relocate or protect-in-place over 20 public and private utilities within public right-of-way along Townsend Street. Advance utility relocations will help facilitate construction of the cut-and-cover portions of the tunnel, the excavations for which will affect most of the public right-of-way, leaving limited space for utilities. The relocations, abandonments, and demolitions are intended to eliminate or reduce utility conflicts with shoring wall construction, road decking installation, excavation, construction of tunnel and station structures while maintaining services to surrounding properties.

As of spring 2026, the 10-UR contract package has been developed to revised 60% level of completion and the Final Basis of Design documentation has been submitted. Work through FY28-29 includes:

- Preparation of the 90%, 100%, and IFB design packages.
- Preparation of the bid package and contract.
- Advertisement and award of the contract using a risk-based, stakeholder-inclusive development process, consistent with the TJPA's goals for The Portal.

Enabling works design associated with utility relocation is anticipated to be complete during this three-year timeframe. Utility Relocation construction may commence in this three-year timeframe, subject to funding availability. The TJPA is actively assessing opportunities to start this construction work prior to the FFGA.

2.1.2 Building Demolition

The building demolition design-bid-build contract (30-BD) will demolish seven buildings as part of the site clearing for construction of the cut-and-cover portions of the tunnel. Five structures located near Second and Howard streets will be demolished to make way for the throat structure where the tunnel widens from two to six tracks as it enters the Salesforce Transit Center. Two structures will be demolished to provide space for a construction shaft, construction laydown area for the mined tunnel, and, ultimately, a ventilation structure at Townsend and Third streets. As of fall 2025, the 30-BD package has been developed to 60% design level of completion. Work through FY28-29 includes:

- Preparation of 90%, 100%, and IFB design packages.
- Preparation of the bid package and contract.
- Advertisement of the contract using a risk-based, stakeholder-inclusive development process, consistent with the TJPA's goals for The Portal.
- Enabling works design associated with building demolition is anticipated to be complete during this three-year timeframe. Building Demolition construction may commence in this three-year timeframe, subject to funding availability. The TJPA is actively assessing opportunities to start this construction work prior to the FFGA.

2.1.3 4th and King Yard Site Clearing

The 4th and King Yard Preparation Package A: Site Clearing design-bid-build contract (20-YA) will relocate or remove all structures and utilities along the south side of Townsend Street between Fourth and Seventh streets and along Seventh Street between Townsend Street and Mission Bay Drive.

Additionally, one pocket track on the north side of the existing Caltrain station at Fourth and King streets and the storage tracks at the corner of Townsend and Seventh streets will be removed.

As of fall 2025, the 20-YA package has been developed to the 60% design level of completion. Work through FY28-29 includes:

- Prepare 20-YA 90%, 100%, and Issue for Bid design packages.
- Prepare the bid package and contract.
- Advertise and award the contract using a risk-based, stakeholder-inclusive development process, consistent with the TJPA's goals for The Portal.

20-YA construction may commence in this three-year timeframe, subject to funding availability. The TJPA is actively assessing opportunities to start this construction work prior to the FFGA.

2.2 Civil and Tunnel Progressive Design-Build

The civil and tunnel progressive design-build contract (40-CT) comprises the completion of the design and construction of the cut-and-cover structures and mined tunnel (excluding rail systems), the ventilation structures, the Fourth and Townsend Street Station fit-out (excluding rail systems), and utility support and temporary and permanent relocations (excluding advance utility relocations (10-UR)). Preconstruction work includes design engineering, preconstruction management, schedule preparation, estimating, acting as lead for coordination across all contract packages, preconstruction surveys, site investigations, hazardous materials assessment, and coordination with and obtaining approvals and permits from stakeholders and authorities having jurisdiction.

2.2.1 Progressive Design-Build Procurement

Work through FY28-29 includes completing the following for the 40-CT contract:

- 40-CT contractor completion of Phase 1 Design Validation
- Establishment of the cost and estimating modeling protocol
- Negotiation of the second phase of design, 30% to 60%
- Progress the design towards the 60% submittal

2.2.2 Preconstruction

Preconstruction service will be incremental, pursuant to work packages issued by the TJPA documenting the associated time, price, and scope of work. Preconstruction services will be sufficient to establish a guaranteed maximum price (GMP) for the project.

- Conduct design progress meetings and over-the-shoulder reviews
- Address design variance requests with operators, as appropriate
- Continue design reviews and cost model discussions
- Progress the 30% to 60% design
- Continuously evaluate construction cost using the open book methodology required by the contract
- Conduct GMP negotiations for completion of final design, construction, and testing and commissioning

2.3 Early Works

Negotiate early works construction packages as required to maintain project schedule, and as permitted by available cash flow.

2.4 Track and Rail Systems

Track and rail systems design will be prepared by the TJPA's General Engineering Consultant (GEC). The track and rail systems construction will be achieved through a construction manager/general contractor (CMGC) procurement, contract (50-TS). That work includes the installation of direct fixation and embedded tracks through the tunnel, stations, and u-wall as well as track and systems modifications to the at-grade 4th and King Yard and trackwork to 16th Street. Trackwork includes the rails, fastening systems, and special trackwork (turnouts, diamond crossings, crossovers, derails, train bumping posts). Associated with trackwork are track alignments, which are the defining horizontal and vertical control lines for the tracks and the structures that support them. Rail systems comprise signaling/train control, overhead contact, communications, central train operations control, and traction power systems and distribution. The systems for tunnel, stations, and ventilation and emergency egress structures include ventilation building systems; fire-life safety and water-air mechanical systems; and security systems.

As of spring 2026, the track and rail systems design has been developed to the 30% level of completion. Subject to funding availability, work through FY28-29 includes:

- Initiate 50-TS 60% to 100% design package preparation.
- Draft the general requirements and contract for the 50-TS CMGC contract.
- Complete the RFP package, including the general requirements and final draft contract.
- Achieving compliance with the governance stage gate approvals to release the RFP.
- Release the RFP and evaluate proposals.
- Negotiate and initiate the preconstruction phase.
- Negotiate open contract terms and conditions.
- Establish the cost model for joint open-book estimating.
- Initiate the CMGC's constructability review of design work to date.
- Reconcile the first and second intermediate set cost and schedule estimates.

The FRA's October 29, 2024, announcement that the TJPA was selected for a Consolidated Rail Infrastructure and Safety Improvements (CRISI) Program award of up to $24,655,000 was anticipated to accelerate the track and rail systems (50-TS) design work. However, on August 26, 2025, FRA withdrew the CRISI award. The TJPA is seeking other funding sources to fill this gap and may seek future funding under the CRISI program under a more favorable environment.

2.5 Station Fit-out at Salesforce Transit Center

Station Fit-out design for the Salesforce Transit Center will be prepared the TJPA's GEC. Station fit-out at the Transit Center will be achieved through a CMGC contract (60-SF). The work comprises the fit-out of the already constructed two-level structural box (train box) at the Salesforce Transit Center, construction of a new entrance lobby and stairs at the east end of the Salesforce Transit Center, and construction of a new above-grade ventilation and support systems structure, including excavating a plenum below the structure and connecting it to the lower concourse. The lower concourse, one level below ground, will house ticketing, passenger waiting, and support spaces for the rail operators (Caltrain and the California High-Speed Rail Authority), and leasable retail space. Six tracks and three center platforms on the platform level two levels below ground will serve commuter and high-speed trains. Back-of-house spaces on this level will support rail service. The scope for the contract includes coordinating with other contracts, obtaining approvals from authorities having jurisdiction; and supplying, installing, testing, and commissioning all elements required for the station fit-out, including manuals, training, spare parts, and record drawings.

As of spring 2026, the station fit-out design has been developed to 30% level of design completion. Subject to funding availability, work through FY28-29 includes:

- Initiate 60-SF revised 30% design package preparation
- Initiate 60-SF 60% design package preparation
- Issue the request for qualifications, evaluate statements of qualifications, and establish a shortlist
- Draft the general requirements and contract
- Complete the request for proposals (RFP) package, including the general requirements and final draft contract
- Achieving compliance with the governance stage gate approvals to release the RFQ and RFP
- Negotiate and initiate the preconstruction phase
- Negotiate open contract terms and conditions
- Establish the cost model for joint open-book estimating
- Initiate CMGC constructability review of design work to date
- Reconcile the first intermediate construction schedule and cost estimate

3 INTERAGENCY COORDINATION

The Portal requires extensive coordination with a range of federal, state, regional, and local agencies. Intergovernmental and interagency coordination is required throughout preliminary engineering, final engineering, construction, and pre-revenue operations for guidance and approvals in the execution of the technical work of the project. The TJPA has entered into cooperation and reimbursement agreements with Caltrain and the City and County of San Francisco for their work on The Portal.

3.1 Caltrain

As the initial operator of The Portal, Caltrain support is required to ensure that The Portal is designed and built according to Caltrain's safety, service, and maintenance requirements. The TJPA has agreed to fund work in support of this need on an annual work plan basis. The following tasks are anticipated through FY28-29:

- Program management, including project controls, administration, and agreements
- Financial planning including O&M, capital, 20-Year Financial Plan development, and travel demand modeling support
- O&M design and analysis
- Completion of Master Cooperative Agreement for O&M and asset disposition
- Environmental permitting (if required)
- Engineering, including civil infrastructure, track and systems, systems integration, and utilities
- Rail vehicles and level boarding requirements
- Construction/constructability reviews
- Procurement support
- Support for 4th and King Yard Preparation Contract 20-YA
- Project management for at-grade and below-grade Track and Systems Contract 50-TS
- Real estate support
- Legal support

3.2 City and County of San Francisco

The Interagency Cooperation Agreement (ICA) is a cooperation and reimbursement agreement between the participating City and County of San Francisco agencies and departments (City agencies) and the TJPA for The Portal. The following City agencies are participating in the ICA:

- Port of San Francisco
- Department of Building Inspection
- Department of Technology
- San Francisco Fire Department
- San Francisco Municipal Transportation Agency
- San Francisco Office of Economic and Workforce Development
- San Francisco Planning Department
- San Francisco Public Utilities Commission
- San Francisco Public Works
- San Francisco Real Estate Division

As outlined in the ICA, subsequent department actions and/or approvals will be required as the TJPA carries out The Portal.

Each fiscal year, each City agency will propose to the TJPA an annual scope and budget, detailing the anticipated scope of City tasks that the City agency will undertake that fiscal year, a budget for those City tasks, and any other terms that are unique to that City agency, unique to the tasks to be undertaken, or will supersede specific ICA terms. Each City agency's annual scope and budget is an appendix to the ICA. San Francisco Public Works functions as the overall coordinator of City participation under the terms of the ICA.

Through FY28-29, work includes:

- Reviewing constructability, design deliverables, and plans; providing design and construction support services; assisting/consulting regarding traffic coordination and required permits. Each participating agency provides staff to provide support through a Technical Advisory Committee led by Public Works.
- Assisting to draft the Public Trust Transfer Agreement and related documents (Port of San Francisco).
- Providing construction inspector services (San Francisco Public Works).
- Reviewing and approving permits.

4 PROFESSIONAL SERVICES

Professional and specialized services are required for the advancement of The Portal, including legal services, financial advisors, economic and real estate analysis, legislative advocacy, auditing, and public relations. Tasks are assigned based on The Portal's current and anticipated needs. Only those costs directly attributable to The Portal are carried in the project budget.

Examples of this work include the following:

- Contract development and negotiations
- Right-of-way acquisition planning, negotiations, and agreements
- Revenue forecasts
- Real estate analysis
- Infrastructure finance and strategic planning
- Financial plans and presentations
- Grant development and administration
- Legislative and funding advocacy
- Public outreach and communications

5 RIGHT-OF-WAY ACQUISITION, RELOCATION AND PROFESSIONAL SERVICES

Right-of-way acquisition for the project requires property acquisition, permanent subsurface easements, temporary construction easements, and interests that would allow the TJPA to permanently install rock dowels in the subsurface of additional properties.

Relocation assistance will be provided to occupants of properties acquired to construct The Portal, in compliance with the federal Uniform Relocation Assistance and Real Property Acquisitions Policies Act of 1970. Right-of-way acquisition and relocation assistance are planned to proceed in four tranches that span approximately two and one-half years. Total acquisitions that result in displacements and complicated relocations are included in the initial tranches to mitigate cost and schedule risks.

The following tasks apply to each tranche of acquisition:

- Conduct an appraisal and a review appraisal (for properties with an appraised value of more than $10,000)

- When required, prepare furniture, fixtures, and equipment appraisals and goodwill appraisals
- Submit recommended just compensation amount to the FTA for concurrence
- Meet and negotiate with property owners
- File eminent domain actions, as required
- Complete relocations, as required
- Turn over property access to contractors

Deliverables:

- Title reports
- Maps and legal descriptions
- Environmental site assessments
- Appraisals
- Purchase and sale agreements or orders of immediate possession
- Timely relocation benefit payments

6 ADVANCE UTILITIES RELOCATION, CONSTRUCTION MANAGEMENT AND INSURANCE

Utility relocation is required at various locations along the project corridor with principal activities located at the Fourth and Townsend Street Station and throat structure at Second and Howard streets. Initial construction will commence along Townsend Street between Seventh Street and Fourth Street. Work will consist of relocation of PG&E overhead power lines, construction of a joint utilities trench, and relocation of dry and wet utilities along this section of the project. Additionally, temporary street lighting and modifications to SFMTA overhead trolley lines will be required. Some utilities may be supported by the street decking associated with the construction of the Fourth and Townsend Street Station.

At Second and Howard streets, utilities will be relocated away from the throat structure or temporarily supported by the street decking associated with the construction of the throat.

Construction management and oversight of the two contractors (10-UR Utility Relocation and 40-CT Civil and Tunnel) will be provided to monitor and report on compliance with all contractual requirements, including cost, schedule, quality, and safety provisions. When required, corrective actions will be instituted.

The TJPA is evaluating the characteristics, cost, benefits, and risk profile of a modified owner-controlled insurance program versus a contractor-controlled insurance program. Before any construction begins, a determination of the preferred program will be made and incorporated into contract documents.

Deliverables:

- All construction contractor related submittals as defined in the TJPA contracts
- Construction management plans, procedures, staffing and management
- Final determination of insurance program structure and requirements

This document provides a detailed description of the Scopes of Work for the Transbay Joint Powers Authority professional services agreements for Program Management / Construction Management (PMCM) support and Engineering and Design (E&D) services for the Portal Project. It should be noted that many of the tasks, particularly those related to procurement support, management, and oversight of other consultants and/or contractor teams are funding dependent.

The Portal PMCM Scope of Services for Prop L Allocation Partial Fiscal Year 2026-27 and 2027-28 (October 2026 through September 2027)

This document identifies the scope of work for Program Management/Construction Management (PMCM) services for the FY 2026-27 Prop L allocation request from October 2026 through September 2027. The Prop L allocation would fund a portion of the services included in the FY 2026-27 scope of services, consistent with the level of effort negotiated between TJPA and the PMCM consultant. This Proposition L allocation request would fund a portion of The Portal's program-wide tasks, as well as the tasks specific to enabling works and civil and tunnel design.

TASK 1: Program Management

1.a Program Management

A. Update Project Management Plan (PMP): Complete an updated Project Management Plan (PMP) and subplans consistent with the requirements of the current status of the project and identifying those activities that must be implemented in support of finalized procurement, commencement of construction activities, grants management, and final design and construction administration. The PMP and subplans will be consistent with the requirements of the Integrated Program Delivery Team (IPDT) and depict organizational relationships, describe communications protocols and be consistent with the Work Breakdown Structure (WBS). The PMP and subplans will be consistent with the requirements for a Federal Transit Administration (FTA) Capital Investment Grant (CIG), the Portal Project Implementation Memorandum of Understanding (Implementation MOU), and the Portal Administrative Management Agreement. To the extent there are conflicts between these documents, the FTA requirements will prevail.

Deliverable: Develop an updated PMP and subplans addressing all requirements including recommendations from the FTA Project Management Oversight Consultant (PMOC).

B. Coordinate with FTA and Authorities Having Jurisdiction, Utilities, and other agencies: PMCM will continue to assist the TJPA with updated submittals to FTA for The Portal's progress documentation as required by the CIG program, support with Project Management Oversight Contractor (PMOC) requirements; and monthly, semi-monthly, and quarterly meetings. PMCM will coordinate with authorities having jurisdiction, including agencies from the City and County of San Francisco (City), state of California, and railroad operators.

Deliverable: PMCM will provide meeting agendas, meeting materials, subject matter experts, and other support functions to monitor requirements, proactively manage communications, action item matrices, and collection and management of responses to questions.

C. Update plans and procedures, and PMOC required documentation: PMCM will assist the TJPA in addressing all required plans and procedures to effectively manage the project. Best practices, TJPA requirements, and FTA requirements will be addressed to provide guidance to the IPDT in delivering a successful project. All PMOC recommendations developed during the capability and capacity evaluation will be addressed.

Deliverable: Updated plans and procedures for project management, project controls, contract administration, engineering management, and construction management.

D. Organize Peer Review and Partnering: As requested, PMCM will assist TJPA in outreach to peer organizations, subject matter experts, and professional organizations to conduct peer review on appropriate topics. PMCM will organize and conduct partnering sessions between the IPDT, E&D consultants, and progressive design-build (PDB) contractor.

Deliverable: PMCM will arrange for, prepare agendas, facilitate, record and prepare actions resulting from peer reviews and partnering sessions.

E. Provide Design Management: PMCM will provide design oversight of the E&D consultants. This work will generally include negotiation of scopes of work, cost proposals, and deliverables. In addition, PMCM will provide oversight and review of design deliverables for completeness and consistency with the approved design scopes of work. PMCM will assist the E&Ds with coordination and collaboration with authorities having jurisdiction and the rail operating partners. PMCM will further provide oversight of the 40-CT Oversight E&D's compliance reviews of 40-CT contract design deliverables.

Deliverable: To the extent that funding permits, three fully negotiated E&D scopes of work and cost proposals suitable for TJPA's review and approval for the 10-UR Designer, 50-TS and 20YA designer (in collaboration with Caltrain), and the 40-CT Oversight / 30-BD Designer /. Over the shoulder, draft, and final design deliverable reviews and dispositions. Design management of each of the three teams and contract compliance review and comment on designers' deliverables.

F. Procurement Documents and Process: PMCM will work to develop the procurement, contracting documents, and evaluation and selection to support the planned design-bid- build, PDB, and E&D procurements for The Portal. This task is highly collaborative and dependent on cooperation and input from the TJPA's Construction Counsel and General Counsel, the E&D (excluding the E&D contracts), TJPA Procurement and Finance staff, partner agencies, and other stakeholders. The scope of this subtask is comprised of:

- Preparing and issuing RFQ documents
- Conducting workshops with external partners
- Preparing and issuing industry review documents
- Developing and issuing RFP documents
- Evaluation of contractor proposals
- Negotiation of the contracts
- Supporting the board award process, including documentation of compliance with Stage Gate requirements

Deliverable: To the extent that funding permits, the following deliverables are planned for FY 2026-27:

- 40-CT: PMCM will provide support to the TJPA during the evaluation and negotiation process.
- 40-CT Design Oversight E&D / 30-BD Designer / 60-SF Designer: PMCM will provide support to the TJPA during the RFP development, evaluation, and negotiation process.
- 10-UR Designer: PMCM will provide support to the TJPA during the RFP development, evaluation, and negotiation process.
- 50-TS Designer / 20-YA Designer: PMCM will provide support to the TJPA and Caltrain during the RFP development, evaluation, and negotiation process.

G. Readiness Assessment: As requested, PMCM will assist with the implementation of the accepted recommendations of the CIG Construction Readiness Assessment. Based on the outcomes from the TJPA's internal partnering program, conducted by others, PMCM will meet with the TJPA regularly during the process to update on the progress and obtain guidance. Support will be provided in drafting job descriptions and FFGA Readiness Summary Report implementation.

Deliverable: PMCM will conduct interviews and draft job descriptions, prepare RASCIs, provide updates to strategic plan objectives implementation, and provide other as-directed support.

H. Development of the Integrated Program Delivery Team (IPDT): PMCM will assist TJPA in the development of the IPDT to optimize collaboration and communication and clarify roles and responsibilities among all parties responsible for the implementation of The Portal.

Deliverable: PMCM will assist the TJPA in the development of necessary tools, graphics, charts, and reports outlining the establishment of the IPDT.

I. General Program Support: PMCM will provide administrative support for agency and intra-agency correspondence, documentation, reporting, meeting logistics, and grant writing.

Deliverable: Staff reports, documentation and correspondence, technical exhibits, and grant submissions.

TASK 2: Project Management

2.a Project Management

A. Contract Administration: PMCM will ensure compliance with the TJPA's prime contract and execute subcontract agreements with team members including required flow downs from the prime contract. PMCM will prepare monthly invoices in accordance with TJPA requirements, including detailed labor, overhead, profit, and other direct costs. Monthly reports will be repaired in accordance with the TJPA requirements.

Deliverable: Monthly invoices, monthly progress reports, quarterly reports.

B. Cost Oversight: PMCM will continually update project costs as secondary mitigations and other scope changes are adopted. The E&D contracts and City and Caltrain invoices will be monitored for cost trends, and any concerns will be promptly reported to the TJPA. Cash flow sensitivity analyses will be prepared based on schedule shifts, funding availability, color of money, and other variables.

Deliverable: Periodic updates of the Standard Cost Categories (SCC) workbook. Cost trending for the PMCM contract, the E&D contracts, and City and Caltrain agreements. Cash flow scenarios and sensitivity analyses.

C. Schedule Management: The Master Schedule will be updated monthly and, when appropriate, converted to a baseline schedule. Analysis of the critical path will be conducted, including recommendations to protect project float. Designer and Contractor schedules will be evaluated for correctness and integrated into the Master Schedule. Support the TJPA with updating and maintaining schedule controls processes and procedures.

Deliverable: Monthly schedule updates and analysis, fragnet analysis, and recommendations for activity resequencing or rescheduling.

D. Risk Management: Quarterly risk workshops will be conducted in accordance with federal transit administration procedures and best practices. One full Monte Carlo analysis to monitor contingency drawdown will be prepared. A continuous risk management process will be upheld through monthly risk reviews with the project team to maintain the risk register, including tracking of ongoing risk mitigations.

Deliverable: Quarterly risk reports and monthly updates to the risk register as required.

E. Scope Management: PMCM will carefully monitor work activities for adherence to the agreed-upon scope of services. Where additional or different scope is required, PMCM will promptly bring it to the attention of TJPA's Project Director with suggested modifications consistent with the overall cost budget for the PMCM NTP for FY 2026-27.

   Deliverable: Monthly tracking for adherence to agreed-upon scope of services. Proposed modifications to scope when appropriate.

F. Value Engineering and Secondary Mitigations: PMCM will conduct one value engineering (VE) exercise with a certified value engineer, should the E&D's or 40-CT PDB contractor's design progress sufficiently to warrant a VE workshop in the fiscal year. If secondary mitigations are identified by the IPDT, they will be evaluated and, as appropriate, presented to the Configuration Management Working Group or Change Control Board, as appropriate. If accepted, and as required, CEQA and NEPA documentation will be prepared for presentation to the TJPA Board and FTA, respectively.

   Deliverable: One VE workshop and VE report will be prepared and submitted. Secondary mitigation analysis and reporting, including environmental documentation, will be prepared and submitted per the resource allocation negotiated with the TJPA.

G. Industry Outreach Support: requested, PMCM will coordinate industry outreach, meetings and assist with raising industry awareness of the Portal and increasing contracting community support.

   Deliverable: Meeting materials, minutes, website content, and action items.

H. Finance Support: PMCM will provide support to TJPA Finance focused on compliance reviews of third-party invoices, third-party payments, and other tasks, as assigned.

   Deliverables: Compliance reviews, checklists, recommendations to process, modify, or reject.

TASK 3: Construction Management and Construction Support Services

3.a Third-Party Coordination: PMCM will coordinate and manage interfaces of all planned procurement activities with third parties, including the coordination of agreements, variances needed, permitting requirements, and potential clashes with planned construction work requiring utility relocations.

Deliverable: Coordination as needed.

3.d Preconstruction Services: PMCM will provide as-needed support for preconstruction surveys necessary for the development of the designs and procurement documents for The Portal contracts, including any constructability analysis needed.

Deliverable: Technical, management, or outreach support for surveys. Constructability analysis as determined necessary by TJPA.

TASK 4: Project Delivery and Contract Development/Compliance

4.a Project Delivery

A. Procurement Support: PMCM will support TJPA in implementing the procurement program including contract terms and conditions, procurement reviews, and program requirements to support delivery of the Portal, including:

- Supporting review of proposals and bids.
- Assist in the updating and implementation of overall project delivery and procurement strategy.
- Advise TJPA on proposer/bidder comments and requests for changes in the procurement documents, and
- Develop specifications, solicitation technical packages, and draft intergovernmental agreements.

Deliverable: Advice and support as required by TJPA for the 40-CT and 10-UR contracts in collaboration with Construction Counsel.

TASK 5: Configuration Management

5.a Document Management: PMCM will provide document management procedures, training, and staff to ensure proper control of project documents across all stakeholders. A searchable database will be maintained to provide centralized control of communications. Provide support for the buildout and integration of the project management information system (PMIS) as it relates to document and records management.

Deliverable: Document control procedures, training, administration of the document control module of the PMIS (InEight document) and records management system.

5.b Contract Interface Management: PMCM will, in coordination with the IPDT, complete the development of plans for contract interface management, contract integration management, and requirements management. Implementation of the plans will be undertaken.

Deliverable: PMCM will, in coordination with IPDT, complete development of plans for contract interface management, contract integration management, and requirements management. Implementation of the plans will be undertaken.

TASK 6: Project Controls

6.a Digital Delivery Management: PMCM will continue to maintain and expand the project's established PMIS, CAD, BIM, and GIS digital delivery tools, including continued software development, training, process mapping, and implementation and integration. A particular focus will be on AutoCAD Construction Cloud (ACC), ArcGIS Online (AGOL), and continued development of the PMIS (InEight), providing multi-functional data collection and reporting capabilities across multiple functions such as schedule, cost, contracts, and risk.

Deliverable: PMCM will provide software, training, system maintenance, and continued improvements.

6.b Project Controls: PMCM will prepare updated program budgets in SCC format broken down by contract package incorporating construction budgets using cost estimates noted above 2.a.B, Cost Oversight, and estimates for other soft costs for each line item.

- Support TJPA's Project Controls Manager to update the Master Schedule based on the WBS and the program implementation plan on a monthly basis to include current information regarding project and contract progress.
- Prepare monthly and quarterly status reports. Prepare quarterly project and contract status reports outlining the progress, cost, schedule, risk, issue resolution, and other aspects of the project or

contract.

Deliverable:

- SCC workbooks detailing program cost by contract package and for the overall program
- Nine (9) monthly and three (3) quarterly status reports to the IPDT, TJPA Board, stakeholders, and funding agencies

TASK 7: Estimating

7.a Cost Estimating: PMCM will develop and prepare cost estimates to support the TJPA's procurement activities for professional services planning, environmental, and construction contracts, including independent cost estimates, when required such as initial E&D task orders/annual work plan(s) and the 30% Design Validation Phase for the 40-CT PDB contract. For the 40-CT contract, a cost model will be collaboratively developed with the contractor in accordance with contract requirements.

PMCM will develop design and construction capital cost budgets, including any needed design optimization and VE studies, constructability reviews, life-cycle cost analyses, and risk assessments determined necessary by the TJPA.

Deliverable: Secondary mitigation estimates, as requested by the TJPA. Independent cost estimates for procurements. A cost model for the 40-CT contract.

TASK 8: Community Outreach and Construction Relations

8.a Public Outreach: PMCM will support TJPA on community relations activities including public outreach, and stakeholder communications as determined necessary by the TJPA.

Deliverable: Community outreach support as requested by the TJPA.

Other Direct Costs (ODCs)

In the course of completing this scope of work, PMCM will incur ODCs, including InEight maintenance, other software (P6, Bluebeam, etc.), computer equipment, personal protective equipment, printing, other miscellaneous expenses, and travel. As with all other expenses, the TJPA will review ODCs for appropriateness and consistency with the TJPA contract prior to payment to PMCM.

Caltrain IA EXHIBIT B
Joint Workplan to be completed by both Parties from October 1, 2026 –September 30, 2027

Workstream (Task)	Scope of Work

Procurement Document Development/Contractor Engagement	Continue to support:
	• Support procurement document preparation, proposal/statement of qualifications evaluation, and contract negotiations for the following procurements:
	  o 40-CT
	  o Utility Relocation (10-UR) engineering and design consultant
	  o General Engineering Consultant (GEC) for 30-BD/40-CT design reviews/60-SF
	• Recognizing that TJPA is lead delivery agency, Caltrain will continue to lead the development of the Track and Systems engineering and design consultant RFP package and proposal/statement of qualifications evaluations
	• Contractor onboarding and preconstruction phase

Engineering and Design/Planning support	Continue to support design, environmental and grant documents: • Concept of Operations • Value Engineering/Scope refinement • Sixth St Sewer relocation and design • Operations planning • Ridership and revenue analysis including evaluation of project demand and project capacity (with SFCTA) • Additional studies to support project activities • Design submittal reviews Deliverables: Program Concept of Operations
Agency and regulatory Coordination	Continue work efforts to support: • FTA/PMOC deliverables • IPMT • JPB and TJPA board engagement • Joint Ad Hoc Committee engagement • EWG • Six party MOUs and work plan • Change Control Board • Escalation Process
MCA or/and 4KY interim agreements development/negotiation	Continue development of certain building blocks for a comprehensive MCA, including: • Continue development of Asset disposition • O&M funding updates in support of MAP 1 deliverable • Reinitiate discussion on O&M MOU strategy and framework
4KY Delivery	Continue work efforts to support: • Coordinate 4KY technical requirements with Caltrain maintenance, operations, engineering, and safety/security units

Workstream (Task)	Scope of Work
The Portal Program Management and Delivery	Continue work efforts to support: • IPDT framework and engagement in delivery team structure • Support TJPA on FFGA Pre-requisite work tasks • Review and development of master program schedule and baseline • PMP and subplan Development and reviews • Apply Lessons Learned from PCEP delivery • Risk Management and mitigation • Joint communication and public outreach strategy and support to TJPA's Communication and Legislative Affairs Director • Technical and Operational working group with TJPA/CHSRA • Concept of Operations Development • Contract Compliance • Funding and Advocacy
Communications, Public Relations	Upon request of TJPA's Communication and Legislative Affairs Director: • Support TJPA Communications Team on program champion messages • Support TJPA on Federal, State and Local delegations for Capital Funding

PMCM Scope Deliverables Compliance Checklist

Subtask	Deliverable
TASK 1 — PROGRAM MANAGEMENT (1.a Program Management)	
1.a.A	**Update Project Management Plan (PMP)** PMCM will develop an updated PMP and subplans addressing all requirements including recommendations from the FTA Project Management Oversight Consultant (PMOC), including 1. a. H. Provide all copies, including updates to Management Plans & Procedures Development Version 7/29/2026 as revised quarterly, and submit status/revision with each invoice
1.a.B	**Coordinate with FTA and Authorities Having Jurisdiction, Utilities, and Other Agencies** PMCM will provide meeting agendas, meeting materials, subject matter experts, and other support functions to monitor requirements, proactively manage communications, action item matrices, and collection and management of responses to questions.
1.a.C	**Update Plans and Procedures, and PMOC Required Documentation** PMCP will submit updated plans and procedures for project management, project controls, contract administration, engineering management, and construction management.
1.a.D	**Organize Peer Review and Partnering** PMCM will arrange for, prepare agendas, facilitate, record and prepare actions resulting from peer reviews and partnering sessions. Include the lesson learned report which explains what TJPA has incorporated into the DTX project.
1.a.E	**Provide Design Management** PMCM will prepare three fully negotiated E&D scopes of work and cost proposals suitable for TJPA's review and approval for the 10-UR Designer, 50-TS and 20YA designer (in collaboration with Caltrain), and the 40-CT Oversight / 30-BD Designer / 60-SF Designer contracts. Over the shoulder, draft, and final design deliverable reviews and dispositions. Design management of each of the three teams and contract compliance review and comment on designers' deliverables.
1.a.F	**Procurement Documents and Process** The following deliverables are planned to be submitted by PMCM for FY 2026-27: • 40-CT: PMCM will provide support to the TJPA during the evaluation and negotiation process. • 40-CT Design Oversight E&D / 30-BD Designer / 60-SF Designer: PMCM will provide support to the TJPA during the RFP development, evaluation, and negotiation process. • 10-UR Designer: PMCM will provide support to the TJPA during the RFP development, evaluation, and negotiation process. • 50-TS Designer / 20-YA Designer: PMCM will provide support to the TJPA and Caltrain during the RFP development, evaluation, and negotiation process.
1.a.G	**Readiness Assessment** PMCM will conduct interviews and draft job descriptions, prepare RASCIs, provide updates to strategic plan objectives implementation, and provide other as-directed support. Please provide the readiness checklist for procurement packages and phases.
1.a.H	**Development of the Integrated Program Delivery Team (IPDT)** PMCM will assist the TJPA in the development of necessary tools, graphics, charts, and reports outlining the establishment of the IPDT.
1.a.I	**General Program Support** PMCM will prepare staff reports, documentation and correspondence, technical exhibits, and grant submissions.
TASK 2 — PROJECT MANAGEMENT (2.a Project Management)	
2.a.A	**Contract Administration** PMCM will submit monthly invoices, monthly progress reports, quarterly reports.
2.a.B	**Cost Oversight** PMCM will provide periodic updates of the Standard Cost Categories (SCC) workbook. Cost trending for the PMCM contract, the E&D contracts, and City and Caltrain agreements, cash flow scenarios and sensitivity analyses.

Subtask	Deliverable
2.a.C	**Schedule Management** PMCM will submit a monthly schedule updates and analysis including narrative, and recommendations for activity resequencing or rescheduling.
2.a.D	**Risk Management** PMCM will submit quarterly risk reports and monthly updates to the risk register.
2.a.E	**Scope Management** PMCM will perform monthly tracking for adherence to agreed-upon scope of services. Proposed modifications to scope when appropriate.
2.a.F	**Value Engineering and Secondary Mitigations** PMCM will conduct one VE workshop and VE report to be prepared and submitted. PMCM will submit secondary mitigation analysis and reporting, including environmental documentation.
2.a.G	**Industry Outreach Support** PMCM will provide meeting materials, minutes, website content, and action items.
2.a.H	**Finance Support** PMCM will conduct compliance reviews, checklists, recommendations to process, modify, or reject.
TASK 3 — CONSTRUCTION MANAGEMENT AND CONSTRUCTION SUPPORT SERVICES	
3.a	**Third-Party Coordination** PMCM will perform coordination as needed.
3.d	**Preconstruction Services** PMCM will perform preconstruction services and deliver technical, management, or support for surveys. Constructability analysis as determined necessary by TJPA.
TASK 4 — PROJECT DELIVERY AND CONTRACT DEVELOPMENT/COMPLIANCE (4.a Project Delivery)	
4.a.A	**Procurement Support** PMCM will advise and support as required by TJPA for the 40-CT and 10-UR contracts in collaboration with Construction Counsel.
TASK 5 — CONFIGURATION MANAGEMENT	
5.a	**Document Management** PMCM will document control procedures, training, administration of the document control module of the PMIS (InEight document) and records management system.
5.b	**Contract Interface Management** PMCM will, in coordination with IPDT, complete development of plans for contract interface management, contract integration management, and requirements management. Implementation of the plans will be undertaken. The plan will ensure interdisciplinary design coordination, design integration, and technical consistency is maintained throughout all construction packages for the project by hiring an Interface Manager with oversight over all construction packages. The Interface Manager shall enforce the Integration Management Plan, an Interface Management Plan, and a Requirements Management Plan and be empowered to make decisions and enforce policies and protocols to minimize interface risk for the project.
TASK 6 — PROJECT CONTROLS	
6.a	**Digital Delivery Management** PMCM will provide software, training, system maintenance, and continued improvements.
6.b	**Project Controls** PMCM will provide SCC workbooks detailing program cost by contract package and for the overall program. Nine (9) monthly and three (3) quarterly status reports to the IPDT, TJPA Board, stakeholders, and funding agencies.
TASK 7 — ESTIMATING (7.a Cost Estimating)	
7.a	**Cost Estimating**

Subtask	Deliverable
	PMCM will submit a secondary mitigation estimate, as requested by the TJPA. Independent cost estimates for procurements. A cost model for the 40-CT contract needs to be done by an experienced independent cost estimate team.
TASK 8 — COMMUNITY OUTREACH AND CONSTRUCTION RELATIONS (8.a Public Outreach)	
8.a	**Public Outreach** PMCM will perform community outreach support as requested by the TJPA.

San Francisco County Transportation Authority Prop L
Allocation Request Form

SFCTA ENHANCED OVERSIGHT PROTOCOL FOR THE PORTAL PROJECT

This Enhanced Oversight Protocol sets the framework for the San Francisco County Transportation Authority (SFCTA) to provide enhanced oversight of The Portal project (also known as the Downtown Rail Extension). The Portal is led by the Transbay Joint Powers Authority (TJPA), in cooperation with multiple partner agencies, including SFCTA.

This Enhanced Oversight Protocol implements SFCTA's project management oversight responsibilities established under The Portal Project Implementation Memorandum of Understanding (Implementation MOU), approved in January 2025, and the Administrative Management Agreement, approved in November 2024. The Protocol is intended to be consistent with, and complementary to, the multi-agency governance and Work Program described in the Implementation MOU, and the Administrative Management Agreement. SFCTA participation in IPMT/IMT and CMWG/CCB does not satisfy or replace SFCTA oversight requirements.

The SFCTA Project Management Oversight team (SFCTA PMO) will have the appropriate technical qualifications, project management skills, and background to perform its duties. All SFCTA costs related to SFCTA oversight will be borne by SFCTA, funded in whole or part by Prop L appropriations.

SFCTA oversight shall complement oversight by the Federal Transit Administration (FTA) and its Project Management Oversight Consultant (PMOC). Performance of FTA oversight does not satisfy or replace SFCTA oversight requirements.

1. **Project Information**: TJPA will provide SFCTA with current project information on a regular basis, including but not limited to: Management Agreement Work Program tracking document, with current status and schedule of tasks; Look Ahead Schedule for IPMT/IMT, EWG, and TJPA Board; project documentation prepared for FTA (e.g., Project Management Plan, Sub-plans, Master Schedule, Risk Register and Risk Reports, Project Cost Estimate/Budget, and updated plans and procedures for project management); and the Capital Funding Plan and Sources/Uses of Capital Cashflow. TJPA shall provide updated Standard Cost Category (SCC) workbooks for individual contract packages, including SCC cost code 80 Professional Services costs for each delivery package broken out by anticipated fiscal year of expenditure, rather than aggregating all SCC 80 costs solely within the master project SCC workbook. All schedule dates presented in project reports, presentations, procurement documents, funding applications, Board materials, governance body materials, and other project documents shall be reconciled to the current CPM schedule. Such documents shall identify the corresponding CPM schedule data date and shall utilize schedule logic, activity durations, milestone dates, and critical path information consistent with the current approved CPM schedule. TJPA shall identify the currently controlling project schedule, budget, funding plan, and risk baseline, including the approval date and approving authority for each baseline document. Until formal adoption of Policy Baseline Documents by the TJPA Board, TJPA shall identify the most recently TJPA Board-approved project schedule and budget used as the basis for project performance reporting. TJPA will maintain a document library with this Project Information, accessible to designated SFCTA staff and/or consultants. On a monthly basis, and at least one week prior to the Monthly SFCTA Oversight Meeting, TJPA will ensure Project Information reflects current versions and will advise SFCTA of material changes.
2. **Monthly SFCTA Oversight Meeting**: SFCTA and TJPA will convene a regular SFCTA Oversight Meeting (Monthly Meeting), to provide for bilateral discussion regarding: Project progress, including task areas where TJPA/SFCTA are co-leads (Capital Funding, O&M Funding, Advocacy, Legislative Strategy, Governance development, FTA process including ridership and financial plan); Work Program tracking document and Look-Ahead Schedule for IPMT/IMT, EWG, and TJPA Board; risks and issues of concern; program status update; and other relevant topics in support of the Project. The Monthly Meeting shall facilitate: problem solving; the discussion and resolution of issues; and the identification of

issues meriting further action and/or escalation. Meetings shall be calendared on a monthly basis, for approximately a 90-minute duration. SFCTA's lead representative shall be the Deputy Director for Capital Projects or their designee; TJPA's lead representative shall be The Portal Project Director or their designee. Each agency shall include attendance by additional staff and/or consultant personnel, as appropriate.

3. **Monthly Report**: On a monthly basis, TJPA shall prepare a single Monthly Project Summary Report, to provide a summary of progress and upcoming activities across the project, as required by funding partners including the Federal Transit Administration (FTA). As a supplement to the monthly report, TJPA shall provide other information reasonably requested by SFCTA, including to incorporate Prop L grant progress reporting requirements. The format of the SFCTA Monthly Report supplement shall be mutually agreed by SFCTA and TJPA. TJPA shall endeavor to transmit the Monthly Report to SFCTA at least one week prior to the Monthly Meeting, and the report shall serve as a basis for discussion at the meeting. The Monthly Project Summary Report shall include a narrative discussion of schedule performance and project risks relative to the most recent TJPA Board-approved project schedule. The narrative shall describe progress achieved during the reporting period, significant milestones completed, upcoming milestones, and any schedule changes since the previous reporting period. For activities on the critical path or near-critical path, the report shall describe schedule variances, the causes of such variances, their impact on project delivery, and actions being taken to mitigate or recover schedule delays. The report shall discuss major project risks affecting schedule performance, including newly identified risks, changes in risk ratings, materialized risks, and status of mitigation actions. Where schedule changes are attributable to project risks, third-party dependencies, funding constraints, procurement activities, permitting activities, stakeholder decisions, or other external factors, the report shall identify those drivers and explain their effect on project milestones. The report shall identify any actual or potential impacts to Stage Gate milestones, FFGA activities, procurement milestones, GMP negotiations, construction start, and Revenue Service. Where milestone dates differ from the most recently TJPA Board-approved schedule, the report shall explain the basis for the revised forecast, identify the underlying drivers of the schedule change, and discuss the associated risks, mitigation measures, and expected recovery approach. The report shall also identify significant schedule assumptions, constraints, and third-party dependencies that could affect future project performance. TJPA shall upload the report, when finalized, to the SFCTA grants portal.

4. **Monthly Meeting Agenda Management**: At the outset of the process described herein, SFCTA and TJPA shall prepare a proposed standing agenda, as mutually agreed, for the Monthly Meetings. On an ongoing basis, SFCTA shall prepare the meeting agenda and shall share a draft agenda with TJPA for input at least three days prior to the Monthly Meeting. Both SFCTA and TJPA may propose items for discussion, in addition to standing items. SFCTA shall prepare and circulate draft meeting notes for the Monthly Meetings.

5. **FTA PMOC AND FMOC**: Representatives of the SFCTA PMO shall be invited to attend the Project's regular meetings with the FTA and its PMOC, including regular monthly and quarterly meetings, unless FTA objects to SFCTA's participation. At such time as the FTA Financial Management Oversight Management Consultant (FMOC) is engaged, a representative of the SFCTA PMO shall be invited to attend the project's regular meetings with the FMOC, unless FTA objects to SFCTA's participation. SFCTA acknowledges TJPA's role as the FTA grantee agency for the Project.

6. **Risk Management**: The SFCTA PMO will support risk management activities and will participate in Risk Workshops, including those convened with FTA, IPMT/IMT, and IPDT. The IPDT will provide SFCTA with risk reports, including documentation of periodic quantitative risk assessments.

7. **Open-Door Policy and Confidentiality**: The IPDT will have an open-door policy and work closely with the SFCTA PMO, which will have reasonable access to project managers and project information. SFCTA understands that some information will be confidential and commits to honor that confidentiality by not sharing or divulging any information so defined.

8. **Other Meetings**: SFCTA may request to participate in or observe other IPDT meetings that would support the Enhanced Oversight effort. The TJPA Project Director (or their designee) will periodically provide a list of current and anticipated regularly-scheduled meetings, and SFCTA and the TJPA Project Director (or their designee) will jointly agree any meetings for SFCTA attendance. Special focused meetings will be set up during the duration of this grant allocation if any deliverable does not meet grant standards or FTA requirements. Meeting subjects may include schedule delays, quality of submittals, or other topics that may arise during project delivery.
9. **Review of Project Deliverables**: TJPA will make available to the SFCTA PMO significant project deliverables, reports, and plans for review and comment, with reasonable and clearly specified requested timelines for SFCTA review. TJPA will also consult with the SFCTA PMO in the preparation of project baseline documents, including cost/budget, CPM and other program management schedules, funding plan, configuration, and risk. Should the SFCTA PMO not provide comments by the due date, TJPA may assume that they are not forthcoming. TJPA will share final deliverables, including resolution of comments from SFCTA and (as applicable) other partner agency reviewers.
10. **Procurements**: Prior to the initiation of procurement processes for The Portal's construction contracts and primary/dedicated consultant contracts, TJPA and SFCTA shall meet-and-confer in order to mutually agree to the nature of SFCTA's participation in proposal/bid review processes (for example, as an observer or as an evaluation panel member, or non-participation).
11. **SFCTA Board/SFBOS**: TJPA staff shall inform SFCTA staff at least two months in advance of any Project items advancing to the SFCTA Board or the San Francisco Board of Supervisors, with discussion at the Monthly SFCTA Oversight Meeting.
12. **SFCTA Grant Requests and Grant Management**: TJPA staff shall engage with the SFCTA PMO regarding planned requests for SFCTA funding, at least three months in advance of formal submission. SFCTA will assist TJPA staff with development of grant amendments and funding requests which are submitted to the SFCTA for approval. TJPA shall submit invoices with required and sufficient documentation to support the reimbursement request. In addition to invoice documentation, TJPA shall provide a summary of accomplishments associated with the requested reimbursement, including progress achieved against the approved Work Program and associated task and subtask activities supported by the funding allocation. SFCTA will review Project invoices submitted to the SFCTA and support timely processing, including communication regarding any questions with respect to invoiced work. For each invoice period, TJPA shall provide a grant progress summary that identifies:
    - Work Program tasks and subtasks advanced during the reporting period;
    - Deliverables status (e.g. completed, submitted, accepted, or in progress);
    - Major decisions, approvals, procurements, or milestones achieved;
    - Budget expended during the reporting period and cumulative expenditures;
    - Remaining budget and forecast expenditures (e.g., forecasted monthly burn rates); and
    - Significant variances between planned and actual progress and associated financial impacts

    The grant progress summary shall be sufficient to demonstrate the relationship between expenditures incurred and progress achieved toward completion of the scope and approved Work Program.

Attachment 5

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project: SFCTA Oversight, Engagement, and Work Program for Pre-Construction Initiation
Primary Sponsor:	San Francisco County Transportation Authority

EXPENDITURE PLAN INFORMATION

PROP L Expenditure Plans	Caltrain Downtown Rail Extension and Pennsylvania Alignment
Current PROP L Request:	$3,500,000
Supervisorial District	Citywide, District 06

REQUEST

Brief Project Description

Extension of Caltrain 1.3 miles from Fourth and King Street to the Salesforce Transit Center at First and Mission Streets, with accommodations for future high-speed rail.

Detailed Scope, Project Benefits and Community Outreach

The Portal project, also known as the Downtown Rail Extension (DTX), will extend Caltrain from its current terminus at Fourth and King streets to the Salesforce Transit Center and will also serve future California High-Speed Rail operations. The project is a local and regional priority for Federal Transit Administration (FTA) funding, and in May 2024 the FTA established its funding share of $3.38 billion. The project's current schedule, subject to completion of the funding plan, anticipates the start of Caltrain service on the project in 2036.

The Portal is the largest single investment in SFCTA's Prop L program, with $300 million programmed to the project in the Prop L Strategic Plan. SFCTA conducts an enhanced level of oversight for The Portal project. This oversight is in addition to SFCTA's participation in the multi-agency governance bodies described in the MOU. SFCTA's oversight is coordinated with the federal oversight provided by the Federal Transit Administration (FTA) and the FTA Project Management Oversight Consultant (PMOC).

This Scope of Work describes SFCTA activities for an approximately 24-month period, from Fall 2026 to Fall 2028.

SFCTA activities in this Scope of Work are organized in the following task areas:

1. **Project Management, Engagement, and Coordination** - This task includes active participation in the project's 6-agency governance bodies, overall program management of SFCTA activities, and advocacy and engagement on behalf the project, including at the regional, state, and federal levels.
2. **Enhanced Oversight** - This task provides for SFCTA's oversight of the project, consistent with the Enhanced Oversight Protocol.
3. **SFCTA Tasks in Portal Work Program** - This task consists of SFCTA activities within the project's work program, including lead/co-lead efforts.

Project Location

Fourth and Townsend Streets to the Salesforce Transit Center at First and Mission Streets

Is this project in an Equity Priority Community?	No
Does this project benefit disadvantaged populations?	Yes

Project Phase(s)

Design Engineering (PS&E)

5YPP/STRATEGIC PLAN INFORMATION

Type of Project in the Prop L 5YPP/Prop AA Strategic Plan?	Named Project
Is requested amount greater than the amount programmed in the relevant 5YPP or Strategic Plan?	Greater than Programmed Amount
PROP L Amount	$3,500,000.00

Justification for Necessary Amendment

This request includes an amendment to the Caltrain Downtown Rail Extension and Pennsylvania Alignment 5YPP to reprogram funds from TJPA to SFCTA for oversight, program management, and SFCTA work program tasks.

The Portal Project: SFCTA Oversight, Engagement, and Work Program for Pre-Construction Initiation

The Portal project, also known as the Downtown Rail Extension (DTX), will extend Caltrain from its current terminus at Fourth and King streets to the Salesforce Transit Center and will also serve future California High-Speed Rail operations. The project is a local and regional priority for Federal Transit Administration (FTA) funding, and in May 2024 the FTA established its funding share of $3.38 billion. The project's current schedule, subject to completion of the funding plan, anticipates the start of Caltrain service on the project in 2036.

Governance: The Transbay Joint Powers Authority (TJPA) is the lead agency for The Portal project and is implementing the project in partnership with SFCTA and other agencies, under the terms of a six-party memorandum of understanding (MOU) executed in 2025. The MOU describes the administrative organizational structure, established by the TJPA Executive Director, for interagency staff-level coordination and engagement in support of project delivery. SFCTA actively participates in this governance structure, including the Executive Working Group (EWG) consisting of executive staff and the Integrated Program Management Team (IPMT) consisting of senior technical representatives from the six partner agencies. The MOU's governance framework reflects the recommendations of The Portal Governance Blueprint developed by SFCTA and MTC, in cooperation with TJPA and the other partner agencies.

SFCTA also provides staff support to San Francisco's representatives on the TJPA Board. Per the Blueprint and MOU, the TJPA Board is expected to establish The Portal Board Committee (to include representation from San Francisco), prior to the award of any construction contract for the project, including the pre-construction phase of the civil-tunnel Progressive-Design-Build contract (40-CT). Additionally, the MOU calls for regular meetings of the six-agency Change Control Board (CCB) to be initiated by this same contract award milestone.

SFCTA Enhanced Oversight: The Portal is the largest single investment in SFCTA's Prop L program, with $300 million programmed to the project in the Prop L Strategic Plan. SFCTA conducts an enhanced level of oversight for The Portal project. This oversight is in addition to SFCTA's participation in the multi-agency governance bodies described in the MOU. SFCTA's oversight is coordinated with the federal oversight provided by the Federal Transit Administration (FTA) and the FTA Project Management Oversight Consultant (PMOC). This enhanced local oversight is conducted on behalf of SFCTA and the City and County of San Francisco (CCSF), which has also invested significantly in The Portal and the Salesforce Transit Center.

Portal Work Program: In concert with the development of the MOU, the project's partner agencies agreed to a multi-year Work Program of activities in support of securing FTA funds and preparing the project for construction. Within the Work Program, SFCTA is identified as lead or co-lead agency for certain project development tasks. This includes: co-leading (with TJPA) the capital funding strategy; co-leading (with MTC) project governance development; and lead for ridership forecasting. SFCTA is also supporting the operations and maintenance (O&M)

funding strategy task, including co-leading (with Caltrain) analysis of potential fare charges for trips on the project.

With respect to project delivery, the Work Program includes advancing the project's major construction contracts, including the Progressive Design-Build (40-CT) contract that will construct The Portal tunnel and other civil works. In December 2025, the 40-CT procurement process was advanced to the Request for Proposals stage (RFP), with this RFP issued to the short-list of qualified teams identified through the preceding Request for Qualifications (RFQ) process. TJPA is also advancing the project's right-of-way (ROW) program, in order to acquire property and property rights necessary for the construction and operation of the project.

This Scope of Work describes SFCTA activities for an approximately 24-month period, from Fall 2026 to Fall 2028.

SFCTA activities in this Scope of Work are organized in the following task areas:

A. **Project Management, Engagement, and Coordination** – This task includes active participation in the project's 6-agency governance bodies, overall program management of SFCTA activities, and advocacy and engagement on behalf of the project, including at the regional, state, and federal levels.
B. **Enhanced Oversight** – This task provides for SFCTA's oversight of the project, consistent with the Enhanced Oversight Protocol.
C. **SFCTA Tasks in Portal Work Program** – This task consists of SFCTA activities within the project's work program, including lead/co-lead efforts.

During the period of performance of these tasks, TJPA is expected to award the 40-CT contract and initiate the 40-CT "pre-construction" phase:

- The first sub-phase of the 40-CT pre-construction process is planned to consist of the contractor's validation of the project's 30 percent design. This sub-phase is expected to be completed during the period covered by this SFCTA Scope of Work.
- The immediate next sub-phase of the 40-CT pre-construction process is planned to consist of the contractor's preparation of the 60 percent design; this sub-phase is expected to be initiated and partially advanced during the period covered by this SFCTA Scope of Work.

In addition to 40-CT pre-construction, The Portal project team will advance other project activities during the period covered by this SFCTA Scope of Work. This period is also expected to include the initiation of regular meetings of the project's staff-level Change Control Board, establishment of The Portal Committee of the TJPA Board, actions at the San Francisco Board of Supervisors, advancement of the TJPA/Caltrain Master Cooperative Agreement (MCA), and coordination with MTC and San Francisco's state and federal legislative delegations.

Scope of Work

Task A: Project Management, Engagement, and Coordination

This Task provides for SFCTA program management, coordination, engagement, and advocacy activities, including management of SFCTA-led tasks and participation in project's multi-agency governance structure.

1. **Project Governance Bodies and Leadership Support:** Participation in regular IPMT and EWG meetings. Participation in future meetings of the Change Control Board (CCB) and Integrated Management Team (IMT) upon commencement of regular CCB and IMT meetings, expected to be initiated in early 2027. Technical and decision support to The Portal Project Director and EWG members. Support to San Francisco representatives to the TJPA Board and The Portal Board Committee; support to associated meetings and processes.
2. **SFCTA Work Program Management:** Management and coordination of SFCTA-led (and co-led) tasks, per the project's Work Program. Management and oversight of consultants retained to undertake SFCTA-led tasks.
3. **Project Advocacy and Engagement:** Advocacy for the project with decision-makers and all levels of government, including regional, state, and federal agencies. Support for, and participation in, funding advocacy activities. Coordination with MTC and with San Francisco's state and federal legislative delegations.

Deliverables:
- IPMT/IMT, CCB, and EWG Briefing Materials
- Periodic Reports to SFCTA Community Advisory Committee (CAC) and Board

Task B: Enhanced Oversight

This Task provides for oversight of Portal project development and delivery activities, consistent with the SFCTA-TJPA Enhanced Oversight Protocol. SFCTA's oversight is complementary to the multi-agency governance structure described in the project's six-party MOU (approved January 2025) and to oversight conducted by FTA. Enhanced oversight is conducted on behalf of SFCTA and CCSF, and oversight reflects the increasing complexity and risk of the project as it moves to delivery.

1. **Work Program Tracking, Status, and Look-Ahead:** Actively support the management of the project's agreed Work Program. Monitor progress and provide input to regular updates, including to enable effective functioning of the IPMT/IMT and EWG. Provide feedback and review for the annual update of the Work Program.
2. **Design, Procurement, and Delivery Oversight/Review/Support:** Provide oversight, technical/commercial/strategic review/comment, and other support to the development of key project deliverables and milestones, within the design, procurement, and program

delivery areas. Participate in technical sessions, peer review meetings, constructability sessions, value engineering, and other activities. Conduct coordination with San Francisco partners, including Mayor's Office, SFMTA, and City Attorney's Office. Provide technical/strategic review and input to key project agreements affecting San Francisco, including but not limited to the TJPA-Caltrain Master Cooperative Agreement (MCA).

3. **Project Management Plans:** Review and comment on certain management plans, particularly as plans relate to change, configuration, contingency, quality, and risk.
4. **Master Schedule:** Regularly review TJPA's project master schedule and schedule reports, with a focus on delivery risks, coordination needs, and critical path management. Provide input to regular oversight meetings.
5. **Risk Management:** Actively support TJPA in risk management activities, including participation in risk workshops/reviews and review/comment on the project risk register. Periodically convene smaller group SFCTA-TJPA risk review meetings, including to identify risks and mitigations. Advise on missing risks, risk ownership/allocation, risk ratings, and risk mitigations.
6. **Cost/Budget:** Review the project's cost estimate and budget, including at periodic update points, such as the preparation of the baseline budget.
7. **Monthly Meetings and Reporting:** Convene dedicated monthly oversight meetings with TJPA, as described in the SFCTA Enhanced Oversight Protocol. Review regular project progress reporting and prepare periodic oversight reports.

Deliverables:

- Monthly oversight meeting agendas and briefing materials
- Comments/inputs to TJPA-led deliverables (design, procurement, management plans, etc.)
- Risk reviews and input to risk management process
- Oversight reports

Task C: SFCTA Work Program Activities

This Task includes tasks to be led or co-led by SFCTA, as described in the agreed Work Program and future updates thereto. This Task will include technical development by SFCTA staff and consultants. The project's Work Program currently includes tasks with direct SFCTA activities in the following areas over the next approximately two years:

1. **Capital Funding Strategy:** During the FTA Project Development process, SFCTA and TJPA developed the initial capital funding plan through a collaborative process with the MOU agencies and funding partners. During the approximately next two years, the funding strategy will be advanced to address new information, including changes to funding programs and forecasts and any updates to project schedule and/or costs. SFCTA and TJPA serve as co-lead agencies for the Capital Funding Strategy task.

2. **O&M Funding Strategy:** TJPA, Caltrain, and SFCTA have developed an initial O&M funding approach. In 2025, the Metropolitan Transportation Commission (MTC) conditioned the advancement of The Portal (to the highest level of regional priority) on work to update and further advance the project's O&M funding strategy; this work includes the assessment of fare charges for trips and the project, including consideration of elasticity impacts on project ridership, and SFCTA and Caltrain are co-lead for this sub-task. Following the completion of the MTC deliverables (to be completed by 3/31/2027), SFCTA will continue to work with TJPA and Caltrain to advance the O&M Funding Strategy in support of the FFGA and the TJPA-Caltrain MCA.
3. **Ridership Forecasts and FTA Process:** SFCTA has led the project's ridership modeling tasks, including the previous round of forecasting conducted during the FTA Project Development phase. SFCTA will lead future ridership forecasting efforts, including as necessary to secure FTA funds.
4. **Governance Blueprint Implementation:** The MOU reflects a phased implementation of the Governance Blueprint's recommendations. SFCTA and MTC serve as co-lead agencies for the continued implementation of the Blueprint's governance structure, including the preparation of the CCB Charter and IMT parameters.

Deliverables:

- Capital Funding Strategy Update
- O&M Funding Strategy Update

San Francisco County Transportation Authority
Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project: Oversight, Engagement, and Work Program for Pre-Construction Initiation
Primary Sponsor:	San Francisco County Transportation Authority

ENVIRONMENTAL CLEARANCE

Environmental Type:	EIR/EIS

PROJECT DELIVERY MILESTONES

Phase	Start		End	
	Quarter	**Calendar Year**	**Quarter**	**Calendar Year**
Planning/Conceptual Engineering (PLAN)				
Environmental Studies (PA&ED)			Oct-Nov-Dec	2019
Right of Way	Apr-May-Jun	2022	Apr-May-Jun	2029
Design Engineering (PS&E)	Oct-Nov-Dec	2021	Jan-Feb-Mar	2029
Advertise Construction	Oct-Nov-Dec	2023		
Start Construction (e.g. Award Contract)	Apr-May-Jun	2029		
Operations (OP)				
Open for Use			Jul-Aug-Sep	2036
Project Completion (means last eligible expenditure)			Oct-Nov-Dec	2037

SCHEDULE DETAILS

The schedule information presented in the table above reflects The Portal Master Schedule. The dates listed for advertisement, contract award, and design engineering pertain to the Progressive Design-Build procurement for the main Civil and Tunnel 40-CT Contract. Specifically, the dates for advertisement and contract award are related to the main Civil and Tunnel 40-CT Contract documents. These schedule dates are subject to future updates.

San Francisco County Transportation Authority
Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project: SFCTA Oversight, Engagement, and Work Program for Pre-Construction Initiation
Primary Sponsor:	San Francisco County Transportation Authority

FUNDING PLAN - FOR CURRENT REQUEST

Fund Source	Planned	Programmed	Allocated	Project Total
EP-205: Caltrain Downtown Rail Extension and Pennsylvania Alignment	$3,500,000	$0	$0	$3,500,000
Phases In Current Request Total:	$3,500,000	$0	$0	$3,500,000

COST SUMMARY

Phase	Total Cost	PROP L - Current Request	Source of Cost Estimate
Planning/Conceptual Engineering	$0		
Environmental Studies	$0		
Right of Way	$0		
Design Engineering	$3,500,000	$3,500,000	SFCTA appropriation estimate
Construction	$0		
Operations	$0		
Total:	$3,500,000	$3,500,000	

% Complete of Design:	30.0%
As of Date:	07/24/2026
Expected Useful Life:	70 Years

Portal Project Oversight, Engagement, and Work Program for Initiation of Pre-Construction
Appropriation Budget
24-Month Period (Fall 2026 to Fall 2028)

					Staff Hours					
					$376	*$315*	*$289*	*$319*	*$274*	*$302*
Task	**Scope**	**Total Cost**	**Staff Cost**	**Consultant Cost**	Deputy Director for Capital Projects	Infrastructure Program Manager	Rail Principal Engineer	Director of Strategy	Senior Public Policy Manager	Manager of Data and Forecasting
A	**Project Management, Engagement, and Coordination**		*1529*	*508*	279	626	144	260	180	40
		$661,453	**$488,203**	**$173,250**	*$105,035*	*$197,422*	*$41,554*	*$82,813*	*$49,307*	*$12,072*
B	**Enhanced Oversight**		*1724*	*3237*	329	720	400	275	0	0
		$1,722,873	**$553,943**	**$1,168,930**	*$123,859*	*$227,066*	*$115,428*	*$87,590*	*$0*	*$0*
C	**SFCTA Tasks in Portal Work Program**		*1814*	*1640*	96	168	12	520	468	550
		$1,115,656	**$552,406**	**$563,250**	*$36,141*	*$52,982*	*$3,463*	*$165,625*	*$128,199*	*$165,996*
	Total	**$3,499,983**	**$1,594,553**	**$1,905,430**						

Portal Project Oversight, Engagement, and Work Program for Initiation of Pre-Construction
Appropriation Budget
24-Month Period (Fall 2026 to Fall 2028)

					Consultant Hours									
					$450	*$375*	*$250*	*$450*	*$120*	*$325*	*$450*	*$250*	*$350*	*$550*
Task	**Scope**	**Total Cost**	**Staff Cost**	**Consultant Cost**	Technical Principal	Technical PM	Engineer	Technical SMEs	Technical Admin	Funding Consultant	Funding SME	Governance Consultant	Governance SME	Legal
A	**Project Management, Engagement, and Coordination**		*1529*	*508*	80	80	0	0	60	110	24	84	30	40
		$661,453	**$488,203**	**$173,250**	*$36,000*	*$30,000*	*$0*	*$0*	*$7,200*	*$35,750*	*$10,800*	*$21,000*	*$10,500*	*$22,000*
B	**Enhanced Oversight**		*1724*	*3237*	335	948	880	560	214	0	0	0	0	300
		$1,722,873	**$553,943**	**$1,168,930**	*$150,750*	*$355,500*	*$220,000*	*$252,000*	*$25,680*	*$0*	*$0*	*$0*	*$0*	*$165,000*
C	**SFCTA Tasks in Portal Work Program**		*1814*	*1640*	0	0	0	0	0	750	240	320	250	80
		$1,115,656	**$552,406**	**$563,250**	*$0*	*$0*	*$0*	*$0*	*$0*	*$243,750*	*$108,000*	*$80,000*	*$87,500*	*$44,000*
	Total	**$3,499,983**	**$1,594,553**	**$1,905,430**										

San Francisco County Transportation Authority
Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project: Oversight, Engagement, and Work Program for Pre-Construction Initiation
Primary Sponsor:	San Francisco County Transportation Authority

SFCTA RECOMMENDATION

Resolution Number:		**Resolution Date:**	
Total PROP L Requested:	$3,500,000	**Total PROP L Recommended**	$3,500,000

SGA Project Number:		**Name:**	The Portal Project: Oversight, Engagement, and Work Program for Pre-Construction Initiation
Sponsor:	San Francisco County Transportation Authority	**Expiration Date:**	12/31/2028
Phase:	Design Engineering	**Fundshare:**	100.0%

Cash Flow Distribution Schedule by Fiscal Year

Fund Source	FY2026/27	FY2027/28	FY2028/29	Total
PROP L EP-205	$1,500,000	$1,750,000	$250,000	$3,500,000

Deliverables

1. Quarterly progress reports shall include % complete of the Scope of Work as outlined in this allocation request form, work performed in the prior quarter, work anticipated to be performed in the upcoming quarter, and any issues that may impact schedule, in addition to all other requirements described in the Standard Grant Agreement.

2. On completion of PDB/40-CT 30% design validation phase (estimated by February 2028), provide a presentation to the CAC and Board on progress and oversight of continued design, including design development, project governance, and funding strategy.

Special Conditions

1. The recommended appropriation is contingent upon amendment of the Prop L Caltrain Downtown Extension and Pennsylvania Avenue Alignment 5YPP. See attached 5YPP amendment for details.

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

San Francisco County Transportation Authority
Allocation Request Form

FY of Allocation Action:	FY2026/27
Project Name:	The Portal Project: SFCTA Oversight, Engagement, and Work Program for Pre-Construction Initiation
Primary Sponsor:	San Francisco County Transportation Authority

EXPENDITURE PLAN SUMMARY

Current PROP L Request:	$3,500,000

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:
AT

CONTACT INFORMATION

	Project Manager	**Grants Manager**
Name:	Jianmin Fong	Anna LaForte
Title:	Infrastructure Program Manager	Deputy Director for Policy & Programming
Phone:	(415) 522-4806	(415) 522-4805
Email:	jianmin.fong@sfcta.org	anna.laforte@sfcta.org

2023 Prop L 5-Year Project List (FY 2023/24 - FY 2027/28) (As Amended April 2025)

Caltrain Downtown Extension and Pennsylvania Avenue Alignment (EP 5)

Programming and Allocations to Date

Pending September 2026 Board

Agency	Project Name		Phase	Status	Fiscal Year					Total
					2023/24	2024/25	2025/26	2026/27	2027/28	
TJPA	The Portal	1	PS&E	Allocated		$9,000,000				$9,000,000
TJPA	The Portal	1,2	PS&E	Allocated			$12,500,000			$12,500,000
TJPA	The Portal	1,3	PS&E	Programmed				$39,000,000		$39,000,000
TJPA	The Portal	3	PS&E	Pending				$22,500,000		$22,500,000
SFCTA	The Portal - Oversight, Engagement, and Work Program for Pre-Construction Initiation	3	PS&E	Pending				$3,500,000		$3,500,000
Total Programmed in 2023 5YPP					$0	$9,000,000	$12,500,000	$65,000,000	$0	$86,500,000
Total Allocated and Pending					$0	$9,000,000	$12,500,000	$26,000,000	$0	$47,500,000
Total Unallocated					$0	$0	$0	$39,000,000	$0	$39,000,000
Total Programmed in 2023 Strategic Plan					$0	$9,000,000	$12,500,000	$65,000,000	$0	$86,500,000
Deobligated Funds					$0	$0	$0	$0	$0	$0
Cumulative Remaining Programming Capacity					$0	$0	$0	$0	$0	$0

Pending Allocation/Appropriation
Board Approved Allocation/Appropriation

FOOTNOTES:

[1] Programming and cash flow as amended in the Final Prop L Strategic Plan, Resolution 25-42, adopted by the Board 4/22/25.

[2] 5YPP amendment to change phase from Right of Way to Design (2026-034, 2/24/2026).

[3] 5YPP amendment to reprogram funds from TJPA to SFCTA for The Portal - Oversight, Engagement, and Work Program for Pre-Construction Initiation (Resolution 2027-XX, 9/

The Portal: Reduced from $65,000,000 to $61,500,000 for TJPA in FY2026/27.

The Portal - Oversight, Engagement, and Work Program for Pre-Construction Initiation: Added project with $3,500,000 for SFCTA in FY2026/27.

NOTE: The Portal: Reduced from $61,500,000 to $39,000,000 and added new line with $22,500,000 for TJPA in FY2026/27.

Attachment 6

San Francisco
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BD091526 RESOLUTION NO. 27-XX

RESOLUTION ALLOCATING $22,500,000 IN PROP L FUNDS, WITH CONDITIONS, TO THE TRANSBAY JOINT POWERS AUTHORITY FOR THE PORTAL PROJECT ENGINEERING PHASE ACTIVITIES STARTING OCTOBER 1, 2026, AND APPROPRIATING $3,500,000 IN PROP L FUNDS, WITH CONDITIONS, FOR THE PORTAL PROJECT OVERSIGHT, ENGAGEMENT, AND WORK PROGRAM FOR INITIATION OF PRE-CONSTRUCTION

WHEREAS, The Portal is a project of local, regional, and statewide significance, that will bring Caltrain and future California High-Speed Rail to the Salesforce Transit Center in downtown San Francisco; and

WHEREAS, The Transbay Joint Powers Authority (TJPA) is the lead agency for The Portal and is working with the Transportation Authority and other partner agencies to advance the project and to secure grant funds from the Federal Transit Administration (FTA), through the FTA Capital Investment Grant (CIG) program; and

WHEREAS, In May 2024, the FTA advanced The Portal to the Engineering Phase of the CIG project development process and established the FTA funding share of $3.384 billion; and

WHEREAS, In December 2024, through approval of Resolution 25-26, the Transportation Authority Board allocated $9,000,000 in Prop L funds to the TJPA for The Portal Project Engineering Phase Activities for Fiscal Year (FY) 2024/25 and authorized the execution of The Portal Project Implementation Memorandum of Understanding (MOU) between the Transportation Authority and the TJPA, the Metropolitan Transportation Commission (MTC), the Peninsula Corridor Joint Powers Board (Caltrain), the California High-Speed Rail Authority (CSHRA), and the City and County of San Francisco (CCSF); and

WHEREAS, The Transportation Authority actively participates in the governance structure described in The Portal Project Implementation MOU, including the Executive Working Group and Integrated Program Management Team; and

WHEREAS, Transportation Authority staff lead or support certain project development tasks within The Portal's work program and perform enhanced project oversight on behalf of both the Transportation Authority and CCSF; and

WHEREAS, The Transportation Authority received a request from TJPA for $22,500,000 in Prop L transportation sales tax funds to support The Portal Engineering Phase

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activities during an approximately twelve-month period beginning October 1, 2026, as summarized in Attachments 1 and 2 and detailed in the attached allocation request form (Attachment 5); and

WHEREAS, Transportation Authority staff has requested appropriation of $3,500,000 in Prop L funds to support continued enhanced oversight, staff-level engagement in MOU governance bodies, and work program activities over an approximately 24-month period, as detailed in the attached allocation request form (Attachment 5); and

WHEREAS, Both of the aforementioned requests seek funds from the Prop L Caltrain Downtown Rail Extension and Pennsylvania Alignment program; and

WHEREAS, As required by the voter-approved Expenditure Plan, the Transportation Authority Board has adopted a 5-Year Prioritization Program (5YPP) for the aforementioned Prop L program; and

WHEREAS, The requested appropriation requires amendment of the Caltrain Downtown Rail Extension and Pennsylvania Avenue Alignment 5YPP to reprogram $3,500,000 in Prop L funds from TJPA to the Transportation Authority for ongoing project oversight, staff-level governance engagement, and work program activities; and

WHEREAS, After reviewing the requests, Transportation Authority staff recommended allocating $22,500,000, with conditions, and appropriating $3,500,000, with conditions, in Prop L Sales Tax funds, as described in Attachment 3 and detailed in the attached allocation request forms, which include staff recommendations for Prop L allocation and appropriation 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 2026/27 budget to cover the proposed actions; and

WHEREAS, At its September 9, 2026, meeting, the Community Advisory Committee considered and unanimously adopted a motion of support for the staff recommendation; now, therefore, be it

RESOLVED, That the Transportation Authority hereby amends the Caltrain Downtown Rail Extension and Pennsylvania Avenue Alignment 5YPP to reprogram $3,500,000 in Prop L funds from TJPA to the Transportation Authority for The Portal Project Oversight, Engagement, and Work Program for Initiation of Pre-Construction; and be it further

RESOLVED, That the Transportation Authority hereby allocates $22,500,000 in Prop L funds to TJPA and appropriates $3,500,000 in Prop L funds to the Transportation Authority for the subject requests as detailed in the attached Allocation Request Forms; and be it further

RESOLVED, That the Transportation Authority finds the allocation and appropriation of these funds to be consistent with the priorities, policies, funding levels, and investment strategies established in the Prop L Expenditure Plan, Strategic Plan, and applicable 5YPP; and be it further

RESOLVED, That authorization for expenditure of funds shall be subject to the Fiscal Year Cash Flow Distribution Schedules contained in the approved Allocation Request Forms; and be it further

RESOLVED, That future annual Capital Expenditure budgets shall reflect the maximum reimbursement amounts established by the adopted cash flow schedules and that the Transportation Authority does not guarantee reimbursement levels greater than those approved herein; 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 a Standard Grant Agreement to that effect; and be it further

RESOLVED, That the Capital Improvement Program of the Congestion Management Program is hereby amended, as appropriate.

Attachments:

1. Summary of Requests Received
2. Project Descriptions
3. Staff Recommendations
4. Prop L Allocation Summaries – FY 2026/27
5. Allocation Request Forms (2)

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1455 Market Street, 22ND Floor, San Francisco, California 94103   415-522-4800   info@sfcta.org   www.sfcta.org

Memorandum

AGENDA ITEM 7

DATE: September 10, 2026

TO: Transportation Authority Board

FROM: Anna LaForte – Deputy Director for Policy and Programming

SUBJECT: 09/15/2026 Board Meeting: Adopt San Francisco's One Bay Area Grant Cycle 4 Project Nominations

RECOMMENDATION ☐ Information ☒ Action

Adopt San Francisco's One Bay Area Grant Cycle 4 (OBAG 4) Project Nominations

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

SUMMARY

The Metropolitan Transportation Commission's (MTC's) OBAG Cycle 4 program directs federal funding to projects and programs that implement the Regional Transportation Plan (Plan Bay Area 2050+). As the Congestion Management Agency for San Francisco, the Transportation Authority is responsible for identifying San Francisco's OBAG 4 county priorities and submitting them to MTC which will select projects from a regionwide pool. MTC has requested that by October 31, 2026, counties submit project lists totaling 120% of our nomination targets which are based on a formula considering population and housing production, with an emphasis on affordable housing. San Francisco's 120% target is 14.8% of the funds available regionwide or $56.7 million over four fiscal years (2026/27-2029/30). In April 2026, the Board approved the San Francisco OBAG 4 County Framework, including a funding distribution for our 120% target (Table 1) and local project screening and prioritization criteria (Attachment 1) for a $48.7 million competitive call for projects, which we released on April 17. By the July 7, 2026 deadline we received 14 applications requesting $89.2 million in OBAG 4 funds (Attachment 2). Attachment 3 shows the staff recommended project nominations in rank order.

San Francisco County Transportation Authority

BACKGROUND

In February 2026, MTC adopted the OBAG Cycle 4 framework, which set aside $319 million for the County Program. Like past cycles, the OBAG 4 framework is designed to advance the implementation of the Regional Transportation Plan, incorporate recent MTC policy initiatives, address federal planning and programming requirements, advance equity and safety, and emphasize a partnership between MTC and county transportation agencies, like the Transportation Authority, to administer the program within each county. As the CMA for San Francisco, the Transportation Authority is responsible for partnering with MTC to identify local priorities that support shared objectives, with an emphasis on local road safety, complete streets, and state of good repair.

County Nomination Target. As part of the OBAG Cycle 4 County Program, MTC set nomination targets for each county based on a formula that considers population and housing (Regional Housing Needs Assessment (RHNA), production, and additional weight based on affordability). To ensure a sufficient pool of project nominations, MTC requested project nominations for 120% of the available funding capacity for the County Program. San Francisco's estimated share of the OBAG Cycle 4 County Program is 14.8%, which equates to $56.7 million for our 120% nomination target and about $47.2 million at 100% of available programming over the four-year OBAG Cycle 4 period (Fiscal Years 2026/27-2029/30). MTC's guidelines indicate that targets do not commit or imply a guaranteed share of funding to any individual county.

San Francisco OBAG 4 County Program Funding Framework. Through Resolution 26-52, the Board adopted San Francisco's OBAG 4 County Framework which includes the OBAG 4 funding distribution shown in Table 1 below and the San Francisco screening and prioritization criteria shown in Attachment 1 to guide project selection for the competitive call for projects.

Table 1. San Francisco OBAG Cycle 4 County Program Funding Framework Distribution

CMA Planning (supplemental funds)	$2,153,000
SFMTA SRTS Non-Infrastructure Program	$5,843,000
Competitive Call for Projects (subject of this action)	$48,660,000
Total Nomination Target (120%)	**$56,656,000**

DISCUSSION

On April 17, 2026, we issued a call for projects for San Francisco's OBAG 4 County Program funds. By the July 7, 2026 deadline, we received 14 applications from six different agencies requesting a total of $89.2 million compared to our $48.66 million target. Attachment 2 provides a summary of the applications received including brief project descriptions and the amount of OBAG 4 funds requested for each project. Applications as submitted can be viewed on the Transportation Authority's website at www.sfcta.org/OBAG4.

County Project Prioritization Process. Staff first screened project submissions for eligibility and determined that all 14 projects were eligible for OBAG 4 funding. Then we evaluated the applications by applying the Board adopted San Francisco prioritization criteria shown in Attachment 1. Projects could receive a maximum of 75 points across all evaluation criteria for the County Program.

MTC Scoring Process. Following receipt of county project nominations at the end of October, MTC will assess and score projects from across the region. MTC scoring will consider county priorities (75 points) by normalizing the scores across counties. MTC also will assign up to 35 additional points based on regional criteria including alignment with regional policies (10 points), deliverability and risk (10 points), federal performance goals (5 points), and air quality benefits (10 points). MTC will initially prioritize projects based on total project score; however, MTC may adjust project prioritization to ensure a balanced program of projects inclusive of a variety of project types, equitable investments, and geographic spread. MTC staff will coordinate with Transportation Authority staff to solicit comments and feedback on the draft OBAG 4 County Program recommendations and may refine the recommended awards based on that feedback.

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Staff Recommendation. Attachment 3 contains the staff recommended OBAG 4 project nominations, as described in the sections below.

Project List for 120% Nomination Target. We recommend six projects for our 120% nomination target ($48.66 million), with all but one project nominated for the full amount of OBAG funds requested. The projects are listed in rank order which generally follows score order, with the exception of SFMTA's West Portal Station Horseshoe Improvement project (would have been 7th on the list). Staff recommend removing the West Portal project from the OBAG nomination list and instead advancing the project with Prop D Transportation Network Company (TNC) Tax funds administered by the Transportation Authority. This approach allows the project to avoid federalizing the project which triggers additional administrative and project delivery requirements. Further, funding the West Portal project with local sources allows us to get closer to including the full OBAG amount requested for the Treasure Island Electric Ferry Pilot project on our 120% target list ($4,301,000 out of $5,000,000 requested), which is helpful since this project has limited alternative fund sources.

Projects with Pending Grants. We received three applications for projects that also applied for or have pending grants from non-OBAG programs, including the two top ranked projects on the 120% nomination target list. The outcomes of these pending grants could result in up to $32.23 million of our $48.66 nomination target being fulfilled by other funding sources.

SFPW's Mission Street Safety Improvements project has a $23.3 million pending grant application for the statewide and regional Active Transportation Program (ATP) with grant awards expected to be announced by early 2027. If successful, the project may be awarded $23.3 million in the statewide competition or partial funding in the regional competition.

SFMTA's Howard Streetscape was awarded $23 million in federal Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grant funds in 2022 and is still waiting for the grant agreement to be executed. SFMTA currently anticipates that it will receive a fully executed RAISE grant agreement by early 2027. If successful, the project will no longer need the requested $8.9 million in OBAG funds, which are part of a back-up plan to replace a portion of the RAISE grant.

Caltrain's 22nd Street Station ADA Improvement project had a $14,147,000 pending grant application to the federal All Stations Accessibility

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Program (ASAP), with grant awards expected to be announced in fall 2026. On September 10, the Federal Transit Administration announced that the project has been awarded $14,147,000, which would eliminate the need for the requested OBAG funds. This project did not score high enough to be included on the project list for the 120% nomination target. However, it is included on a contingency list, as described below. Given that this has just been announced today, we are recommending leaving the project on the contingency list for now, while we coordinate with Caltrain staff to confirm grant details.

Contingency List. Due to the aforementioned pending grants from non-OBAG sources, and in consultation with MTC, we recommend nominating seven projects in rank order for a contingency list. If additional OBAG 4 or other funds become available for San Francisco OBAG projects (e.g. Mission or Howard projects secure all or a portion of pending grants), Transportation Authority staff will coordinate with MTC staff to consider applying any additional or freed up OBAG 4 funds to unfunded projects in rank order as shown in Attachment 3.

Projects Recommended for non-OBAG Funds. As discussed above, staff recommend removing **SFMTA's West Portal Station Horseshoe Improvement** project from the 120% nomination target list and instead prioritizing it for Prop D TNC Tax funds. We also recommend removing **SFMTA's Digital Wayfinding and New Paratransit Software Procurement** project from the contingency list. While the project application is not competitive for OBAG (lowest scoring application), it is an important project for disadvantaged groups that we can advance using prior year Prop L Paratransit program funds that are already available to SFMTA. Programming and allocation of Prop D and Prop L funds are subject to future Board action that we plan to agendize later this fiscal year.

Next Steps. After the Board adopts the San Francisco OBAG 4 project nominations, we will submit the resolution and supporting materials to MTC by its October 31, 2026 deadline. MTC anticipates final project selection and Commission approval of recommended OBAG 4 County Program grant awards in early 2027. MTC will consider funding nominated projects not initially awarded by the Commission if additional County Program capacity becomes available. We will work with sponsors on identifying alternative funding sources for projects that ultimately do not receive OBAG funding to help advance projects and have already started these conversations with project sponsors.

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FINANCIAL IMPACT

The recommended action would not have an impact on the adopted Fiscal Year 2026/27 budget.

CAC POSITION

The CAC will consider this item at its September 9, 2026 meeting.

SUPPLEMENTAL MATERIALS

- Attachment 1 – OBAG 4 San Francisco Screening and Prioritization Criteria
- Attachment 2 - Summary of OBAG 4 Applications Received
- Attachment 3 - Staff Recommended OBAG 4 Nominations in Rank Order
- Attachment 4 - Staff Recommendation - Maps of Project List for 120% Nomination Target and Contingency List
- Attachment 5 - Resolution
- OBAG 4 applications as received are available to view on the Transportation Authority's website at www.sfcta.org/OBAG4/

One Bay Area Grant (OBAG) Cycle 4

San Francisco Screening and Prioritization Criteria

To develop a program of projects for San Francisco's OBAG 4 County Program, the San Francisco County Transportation Authority (Transportation Authority) will first screen candidate projects for eligibility and then will prioritize eligible projects based on evaluation criteria. The Metropolitan Transportation Commission's (MTC's) OBAG 4 guidelines set most of the screening and evaluation criteria to ensure the program is consistent with Plan Bay Area and federal funding guidelines. We have added a few additional criteria to better reflect the particular conditions and needs of San Francisco and allow us to better evaluate project benefits and project readiness (as indicated by underlined text).

OBAG 4 Screening Criteria

Projects must meet all screening criteria in order to be considered further for OBAG funding. The screening criteria will focus on meeting the eligibility requirements for OBAG funds and include:

Screening Criteria for All Types of Projects

1. Project sponsor is eligible to receive federal transportation funds.
2. Project must be eligible for STP or CMAQ funds, as detailed in 23 USC Sec. 133 and at https://www.fhwa.dot.gov/fastact/factsheets/stbgfs.cfm (STP), and in 23 USC Sec. 149 and at https://www.fhwa.dot.gov/fastact/factsheets/cmaqfs.cfm (CMAQ).
3. Project scope must be consistent with the intent of OBAG and its broad eligible uses. For more information, see MTC Resolution 4740 Attachment A: OBAG 4 Project Selection and Programming Policies and Attachment A, Appendix A-1: County & Local Program Call for Projects Guidelines.
4. Project must be consistent with Plan Bay Area 2050+, available at https://www.planbayarea.org/ and the San Francisco Transportation Plan (SFTP 2050 or the underway SFTP 2050+ update).
5. Project must demonstrate the ability to meet all OBAG 4 programming policy requirements described in MTC Resolution 4740, including timely use of funds requirements.
6. Project sponsor is requesting a minimum of $500,000 in OBAG funds.
7. Project has identified the required 11.47% local match in committed or programmed funds, including in-kind matches for the requested phase. Alternatively, for capital projects the project sponsor may demonstrate fully funding the pre-construction phases (e.g. project development, environmental or design) with local funds and claim toll credits in lieu of a match for the construction phase. In order to claim toll credits, project sponsors must still meet all federal requirements for the pre-construction phases even if fully-funded.
8. Sponsors shall follow the selection and contracting procedures in the Caltrans Local Assistance Procedures Manual.

Additional Screening Criteria for Street Resurfacing Projects

1. Project selection must be based on the analysis results of federal-aid eligible roads from San Francisco’s certified Pavement Management System.
2. Pavement rehabilitation projects must have a PCI score of 70 or below. Preventive maintenance projects with a PCI rating of 70 or above are eligible only if the Pavement Management System demonstrates that the preventive maintenance strategy is a cost-effective method of extending the service life of the pavement.

OBAG 4 Prioritization Criteria

Projects that meet all of the OBAG screening criteria will be prioritized for OBAG funding based on, but not limited to the factors listed below. The Transportation Authority reserves the right to modify or add to the prioritization criteria in response to additional MTC guidance and if necessary to prioritize a very competitive list of eligible projects that exceed available programming capacity.

Based on MTC Resolution 4740 and Transportation Authority Board priorities, points will be awarded to projects that:

1. Are located in Priority Development Areas (PDAs) or Transit-Oriented Communities (TOCs). OBAG established a minimum requirement that 80% of OBAG funds in San Francisco be used on projects that are partially or entirely within a mile or less of a PDA or TOC. On a case-by-case basis and at the request of a CTA, MTC may consider additional projects as PDA- or TOC-supportive which are not located within a mile or less of either geography but otherwise have a clear and direct connection to PDA(s) and/or TOC(s).
2. Increase safety. <u>Projects that address corridors on the High Injury Network or other locations with a known safety issue will be given priority. Project sponsors must clearly define and provide data to support the safety issue that is being addressed and how the project will improve or alleviate the issue.</u>
3. Have multi-modal benefits. <u>Projects that support complete streets, including directly benefiting multiple system users (e.g. pedestrians, cyclists, transit passengers, motorists), will be prioritized.</u>
4. <u>Improve environmental sustainability. Projects that achieve one or more of the objectives below will be prioritized:</u>
    a. Reduce emissions <u>by supporting mode shift to non-polluting or low-polluting modes, such as walking, bicycling, and transit; project sponsors must provide evidence and/or data to support the projected mode shift of the project.</u>
    b. <u>Improve the</u> resilience <u>of transportation infrastructure to the effects of climate change, such as with physical protection from or adaptation to adverse climate impacts or redundant or relocated infrastructure.</u>
    c. Manage stormwater, <u>such as by constructing bioswales or permeable ground surfaces.</u>

5. Maintain transportation infrastructure in a state of good repair.
6. Demonstrate public support, as demonstrated through Community-Based Transportation Plans, PDA plans, other local planning or project prioritization processes, letters of support, and/or other means identified by the Transportation Authority. Projects with clear and diverse community support, including from disadvantaged populations (e.g., communities historically harmed by displacement, transportation projects and policies that utilized eminent domain, people with low incomes, people of color) and/or identified through a community-based planning process will be prioritized. An example of a community-based plan is a neighborhood transportation plan, corridor improvement study, or station area plan that is community driven.
7. Provide demonstrated benefits to historically marginalized or underserved groups, including benefits to Equity Priority Communities or similar local designations, alignment with agency Americans with Disabilities Act (ADA) Transition Plans, and/or other means identified by the Transportation Authority. Priority will be given to projects that directly benefit disadvantaged populations, whether the project is directly located in an Equity Priority Community or can demonstrate benefits to disadvantaged populations.
8. Demonstrate project readiness and deliverability. In determining the ability to meet project delivery requirements, the Transportation Authority will consider the project sponsor(s)' project delivery track record for federally funded projects. The Transportation Authority will also evaluate project readiness, including but not limited to project is ready to proceed in fiscal year of programming; adequacy of scope, schedule, budget and funding plan relative to current project status (e.g. more detail and certainty will be expected for a project about to enter construction than for a project about to enter design); whether prior project phases are completed or when they are expected to be completed; and whether litigation, community opposition or other factors may significantly delay project.
9. Take advantage of construction coordination**.** Projects that are coordinated with other construction projects, such as making multi-modal improvements on a street that is scheduled to undergo repaving, will receive priority. Project sponsors must clearly identify related improvement projects, describe the scope, and provide a timeline for major milestones for coordination (e.g. start and end of design and construction phases).
10. Improve transit reliability and accessibility. Priority will be given to projects that increase transit accessibility, reliability, and connectivity (e.g. stop improvements, transit stop consolidation and/or relocation, transit signal priority, traffic signal upgrades, travel information improvements, wayfinding signs, bicycle parking, and improved connections to regional transit). Additional priority will be given to projects that support the existing or proposed rapid network or rail, including projects identified in transit performance plans or programs such as the San Francisco Municipal Transportation Agency's Muni Forward program.

11. Improve access to schools, senior centers, and other community sites. Priority will be given to infrastructure projects that improve access to schools, senior centers, and/or other community sites.
12. Have limited other funding options. Sponsors should justify why the project is ineligible, has very limited eligibility, or competes poorly to receive other discretionary funds.
13. Demonstrate higher fund leveraging. Priority will be given to projects that can demonstrate leveraging of OBAG funds above and beyond the required match of 11.47%.

Additional Considerations

1. Project Sponsor Priority: For project sponsors that submit multiple OBAG applications, the Transportation Authority will consider the project sponsor's relative priority for its applications.
2. Geographic Equity: Programming will reflect fair geographic distribution that takes into account the various needs of San Francisco's neighborhoods. This factor will be applied program-wide and to individual projects with improvements at multiple locations, as appropriate.

The Transportation Authority will work closely with project sponsors to clarify scope, schedule and budget; and modify programming recommendations as needed to help optimize the projects' ability to meet timely use of funds requirements.

If the amount of OBAG funds requested exceeds available funding, we reserve the right to negotiate with project sponsors on items such as scope and budget changes that would allow us to develop a recommended OBAG project list that best satisfies all of the aforementioned prioritization criteria.

In order to nominate the most competitive list of San Francisco priority projects, we may not recommend projects strictly in score order if, for example, we, working with MTC, are unable to match the project to OBAG 4 fund sources eligibility (e.g. CMAQ vs. STP).

Attachment 2.
San Francisco One Bay Area Grant Cycle 4 (OBAG 4)
Summary of Applications Received[1]

Project #	Project Name (Sponsor)[2]	Brief Description	District(s)	Requested Phase(s)	Total Project Cost	Requested OBAG Amount
1	16th Street Mission Elevator Modernization (BART)	Construction funds are requested to upgrade the two existing elevators at the 16th Street Mission BART Station. One elevator provides access from the street to the concourse level, and the other provides access from the concourse to the platform levels. Both elevators have exceeded their useful service lives and experience outages that limit mobility and create barriers to accessing transit. The project will upgrade structural, electrical, mechanical, and architectural components and add remote monitoring technology to restore dependable vertical circulation, reduce lifecycle maintenance costs, and ensure that riders with disabilities, seniors, and other transit-dependent populations can access the regional rail network reliably. If funded, BART would start construction in summer 2029 and expects the elevators to be open for use in fall 2032.	9	Construction	$20,570,000	$8,000,000
2	16th Street Plaza Redesign (BART)	Requested funds would be used to redesign the northeast and southwest plazas at the 16th Street Mission BART Station, one of the busiest stations in the BART system. Project scope includes final design documents informed by community input, for plaza paving, enhanced lighting, closed-circuit televisions, overhead shade structures, moveable seating, wayfinding signage, and art integration to improve transit access and rider experience. If funded, design would be done by summer 2028.	9	Design	$10,500,000	$1,062,000
3	22nd Street Station ADA Improvement (Caltrain) [Project with pending grant[4]]	The 22nd Street Station is the only non-wheelchair accessible station on Caltrain's weekday rail line, creating a mobility gap for riders with disabilities, seniors, and other transit-dependent users. Requested funds would be used to install ADA-compliant ramps between street level and the northbound and southbound platforms at the station. The project scope also includes platform resurfacing, tactile tiles, lighting, signage, and wayfinding to improve accessibility, safety, and connectivity. If funded, Caltrain anticipates starting construction in spring 2028 with the project open for use in fall 2029.	10	Construction	$19,134,000	$14,147,000
4	Bayview Caltrain Station (SFCTA)	Requested funds would be used to advance pre-environmental work for the infill Bayview Caltrain Station at Oakdale Avenue. The new station would restore Caltrain access in the Bayview since the Paul Avenue Station was closed in 2005, increasing transit accessibility, reliability, and connectivity for southeast San Francisco residents. In coordination with Caltrain and building on the Bayview Caltrain Station Location Study (seeking Board approval in October), this project includes the development of project alternatives, outreach, conceptual cost estimates and funding plan, refined project designs, and a Project Study Report with recommended alternatives to evaluate in a subsequent environmental phase. If funded, SFCTA anticipates completing the OBAG scope of work in summer 2028.	10	Planning	$2,000,000 (planning only)	$1,062,000

5	Geary-19th Avenue Subway (SFCTA)	Following on the Geary/19th Avenue Subway and Regional Connections Study (June, 2026), requested funds would advance planning and project development for a rail rapid transit subway oriented under Geary Boulevard and 19th Avenue. The subway corridor would begin in Downtown San Francisco near the Salesforce Transit Center, continue west through the Western Addition, turn south through Golden Gate Park, continue beneath 19th Avenue, and terminate near the existing Daly City BART station. The project would address critical transportation needs by providing high-capacity, reliable, and fast transit in one of San Francisco's most heavily traveled and transit-dependent corridors. The project team would conduct a preliminary alternatives analysis that will reduce the number of options for subway routing, station locations and configuration, operations and maintenance facility size and location, regional integration, and train technology. If funded, SFCTA staff anticipates completing the preliminary alternatives analysis by summer 2029.	1, 4, 5, 6, 7	Planning	$15,000,000 (planning only)	$1,500,000
6	California Street Transit and Safety (SFMTA)	Construction funds are requested for transit priority and pedestrian safety improvements on the 1 California bus route. This request would help fund Phase 1 of the project which covers the 3.5-mile western segment of the route on California Street between Steiner Street and 32nd Avenue, as well as 32nd Avenue, the Geary Boulevard inbound terminal, and Clement Street. The project is part of SFMTA's Muni Forward program and located on the High Injury Network. The planning phase is underway, to be followed by the project design phase. The scope would include Muni Forward elements such as stop improvements, stop optimization, and signal timing upgrades as well as elements to provide safe pedestrian access to the bus stops such as higher-visibility crosswalks, enhanced lighting, and corner bulb-outs. If funded, SFMTA anticipates starting construction in spring 2030 and finishing by winter 2031.	1, 2	Construction	$19,214,020	$10,878,000
7	Chinatown Community-Based Transportation Plan (SFMTA)	Requested funds would be used to develop a comprehensive community-based transportation plan (CBTP) to identify existing transportation connections to Chinatown, ways to optimize and preserve essential transit access, and multimodal options that increase or improve access between this neighborhood and other areas of the city and region. The CBTP includes a curb management strategy, transit access optimization, and a streetscape plan that emphasizes pedestrian safety. Project partners include the Chinatown Community Development Center and Chinatown Transportation Research and Improvement Project. The SFMTA anticipates completing the CBTP by winter 2030.	3	Planning	$669,000	$592,000

8	Digital Wayfinding and New Paratransit Software Procurement (SFMTA)	Funds are requested to plan, design, and implement digital wayfinding equipment to benefit the visually impaired along five to be determined Muni bus lines and at all underground Muni Metro stations. In addition, requested funds would also support procurement and maintenance of Non-Emergency Medical Transportation billing software to efficiently track paratransit and taxi service trips to health care appointments that qualify for reimbursement through managed care providers. This project would strengthen SFMTA's paratransit program by improving accessibility, streamlining payments, and enhancing coordination across services. Both elements of the project scope support objectives identified in SFMTA's Accessible Transportation Needs Assessment. If funded, this combined project would be completed by fall 2031.	citywide	Planning, Design, Construction	$575,000	$507,000
9	Howard Streetscape (SFMTA) [Project with pending grant[4]]	Requested funds would help support construction of traffic safety improvements on Howard Street from 4th to 11th streets. This project includes a series of treatments on the High Injury Network corridor including traffic lane reduction, a two-way protected bikeway, raised crosswalks, pedestrian bulb-outs, protected intersections, traffic signals with separate bicycle and vehicle phases, mid-block crossings, and pedestrian lighting. If funded, SFMTA anticipates beginning the construction phase in summer 2027 with the project open for use in spring 2031.	6	Construction	$58,360,575	$8,937,000
10	Traffic Signal Cabinet and Fiber Communications Upgrade Program (SFMTA)	Requested funds would be used to replace outdated traffic signal cabinets and network devices and transition communications from wireless radios to fiber at 25 locations (see application for details) with transit service and on the High Injury Network. Upgrades would provide more reliable network connectivity to support existing operations like traffic cameras and lay the foundation for future integration of transportation systems, including cloud-based transit signal priority. If funded, construction is planned for early 2028 through winter 2031.	1, 2, 3, 5, 6, 8, 11	Construction	$3,016,000	$2,666,000
11	West Portal Station Horseshoe Improvement (SFMTA)	Requested funds would be used to design and construct transit and pedestrian safety improvements at the West Portal Muni Station. SFMTA installed near-term safety improvements in 2025 in the immediate vicinity of the station to allow measures to be tested before implementing a more permanent version. This project will consider more permanent improvements such as sidewalk expansion, fencing along the tracks, station wayfinding, and pedestrian bulb-outs to enhance safety and accessibility to the station, and improve customer experience. The scope includes additional public engagement to refine the designs. If funded, design would start in early 2027 and would be completed in winter 2027, with the project open for use in early 2030.	7	Design and Construction	$4,000,000	$1,500,000

12	Access for All: Downtown Curb Ramp and Access Improvements (SFPW)	Funds would be used to construct 29 curb ramps and install accessible (audible) pedestrian signals and restripe crosswalks at the following six priority intersections with sub-sidewalk basements: Clay Street and Montgomery Street, California Street and Montgomery Street, Bush Street and Grant Street, Powell Street and Sutter Street, Geary Street and Kearny Street, and Eddy Street and Mason Street. All but one location (Sutter Street and Powell Street) is located on the High Injury Network. The project stems from long-standing, community informed accessibility needs at these locations. Construction would be coordinated with paving work at three project locations to reduce construction impacts in the area and achieve cost savings. If funded, SFPW anticipates starting construction in summer 2028, with the project open for use in summer 2030.	3, 5	Construction	$12,580,000	$10,005,000
13	Mission Street Safety Improvements (SFPW) [Project with pending grant[4]]	This request would fund construction of pedestrian, transit, and streetscape improvements on Mission Street from The Embarcadero to 3rd Street. The project woiuld address critical pedestrian safety needs on this High Injury Network corridor with 8 pedestrian bulb-outs, 41 curb ramps, and enhanced lighting. It would improve transit efficiency with upgraded signals and red-painted transit-only lanes, and support resilience and stormwater management by enhancing urban greening. The project scope also includes state of good repair elements including street resurfacing, traffic signal upgrades, and transit system improvements to the overhead catenary system. If funded, SFPW would begin the construction phase in summer 2028 and expects to be done by summer 2030.	6	Construction	$27,293,000	$23,293,000
14	Treasure Island Electric Ferry Pilot (TIMMA)	Requested funds would be used for first three years of operation of an all-electric ferry service between Treasure Island and the San Francisco Ferry Building. This new service would utilize the first high-speed, high-capacity, zero-emission vessel in the country to provide a reliable alternative to congested freeway travel across the Bay Bridge and improve access to and from the island. The project aligns with local and regional planning priorities, including the Treasure Island Transportation Implementation Plan which identified ferry service as a top community and planning priority for the island. OBAG funds would be used to support ferry pilot service from fall 2027 to fall 2030.	6	Pilot Operations	$14,400,000	$5,000,000
				TOTAL	$190,311,595	$89,149,000
		San Francisco's 120% OBAG Nomination Target [3]				$48,660,000

[1] Projects are sorted alphabetically by sponsor and then project name.

[2] Sponsor abbreviations include: Bay Area Rapid Transit (BART), Peninsula Corridor Joint Powers Authority (Caltrain), San Francisco County Transportation Authority (SFCTA), San Francisco Municipal Transportation Agency (SFMTA), San Francisco Public Works (SFPW), and Treasure Island Mobility Management Agency (TIMMA).

[3] OBAG 4 nomination target reflects MTC's guidance to submit project nominations for 120% ($48,660,000) of San Francisco's share of available funding capacity for the County Program ($39,217,000).

[4] This project has a pending grant, which if secured, would reduce or eliminate the need for OBAG funds. See Projects with Pending Grants section of memo for additional details.

Attachment 3.
San Francisco One Bay Area Grant Cycle 4 (OBAG 4)
Staff Recommended Nominations in Rank Order

Rank	Score	Project Name (Sponsor)[1]	Requested Phase(s)	Requested OBAG Amount	Recommended OBAG Nomination [3]
1	63	Mission Street Safety Improvements (SFPW) [4]	Construction	$23,293,000	$23,293,000
2	57	Howard Streetscape (SFMTA) [5]	Construction	$8,937,000	$8,937,000
3	52	16th Street Plaza Redesign (BART)	Design	$1,062,000	$1,062,000
4	50	Access for All: Downtown Curb Ramp and Access Improvements (SFPW)	Construction	$10,005,000	$10,005,000
5	49	Bayview Caltrain Station (SFCTA)	Planning	$1,062,000	$1,062,000
6	49	Treasure Island Electric Ferry Pilot (TIMMA)	Pilot Operations	$5,000,000	$4,301,000
		PROJECT LIST FOR 120% OBAG NOMINATION TARGET[2]		**$49,359,000**	**$48,660,000**
6	49	Treasure Island Electric Ferry Pilot (TIMMA)	Pilot Operations	$699,000	$699,000
7	48	22nd Street Station ADA Improvement (Caltrain) [6]	Construction	$14,147,000	$14,147,000
8	46	Geary-19th Avenue Subway (SFCTA)	Planning	$1,500,000	$1,500,000
9	46	16th Street Mission Elevator Modernization (BART)	Construction	$8,000,000	$8,000,000
10	46	Chinatown Community-Based Transportation Plan (SFMTA)	Planning	$592,000	$592,000
11	43	California Street Transit and Safety (SFMTA)	Construction	$10,878,000	$10,878,000
12	43	Traffic Signal Cabinet and Fiber Communications Upgrade Program (SFMTA)	Construction	$2,666,000	$2,666,000
		OBAG PROJECT CONTINGENCY LIST		**$38,482,000**	**$38,482,000**
	49	West Portal Station Horseshoe Improvement (SFMTA) [7]	Design and Construction	$1,500,000	To be prioritized for Prop D TNC Tax funds
	32	Digital Wayfinding and New Paratransit Software Procurement (SFMTA) [7]	Planning, Design, Construction	$507,000	To be prioritized for Prop L Paratransit program funds
		PROJECTS RECOMMENDED FOR NON-OBAG FUNDS		**$2,007,000**	

[1] Sponsor abbreviations include: Bay Area Rapid Transit (BART), Peninsula Corridor Joint Powers Authority (Caltrain), San Francisco County Transportation Authority (SFCTA), San Francisco Municipal Transportation Agency (SFMTA), San Francisco Public Works (SFPW), and Treasure Island Mobility Management Agency (TIMMA).

[2] OBAG 4 nomination target reflects MTC's guidance to submit project nominations for 120% ($48,660,000) of San Francisco's estimated share of available funding capacity for the County Program (100% share is estimated at $39,217,000).

[3] If additional OBAG 4 or other funds become available for San Francisco OBAG projects (e.g. Mission or Howard projects secure all or a portion of pending grants (See footnotes 4 and 5)), Transportation Authority staff will coordinate with MTC staff to consider applying any additional or freed up OBAG 4 funds to unfunded projects in rank order.

[4] Pending grant application for $23,293,000 in Active Transportation Program (ATP) funds. See Projects with Pending Grants section of memo for additional details.

[5] Pending grant obligation of $23,000,000 in Rebuilding American Infrastructure with Sustainability and Equity (RAISE) funds. See Projects with Pending Grants section of memo for additonal details.

[6] Pending grant application for $14,147,000 in All Stations Accessibility Program (ASAP) funds. See Projects with Pending Grants section of memo for additional details.

[7] Project would be funded by non-OBAG sources. See memo for additional details.

ATTACHMENT 4

San Francisco County Transportation Authority

SAN FRANCISCO ONE BAY AREA GRANT CYCLE 4 (OBAG 4)

September 2026

OBAG 4 Call for Projects: Project List for 120% Nomination Target – DRAFT

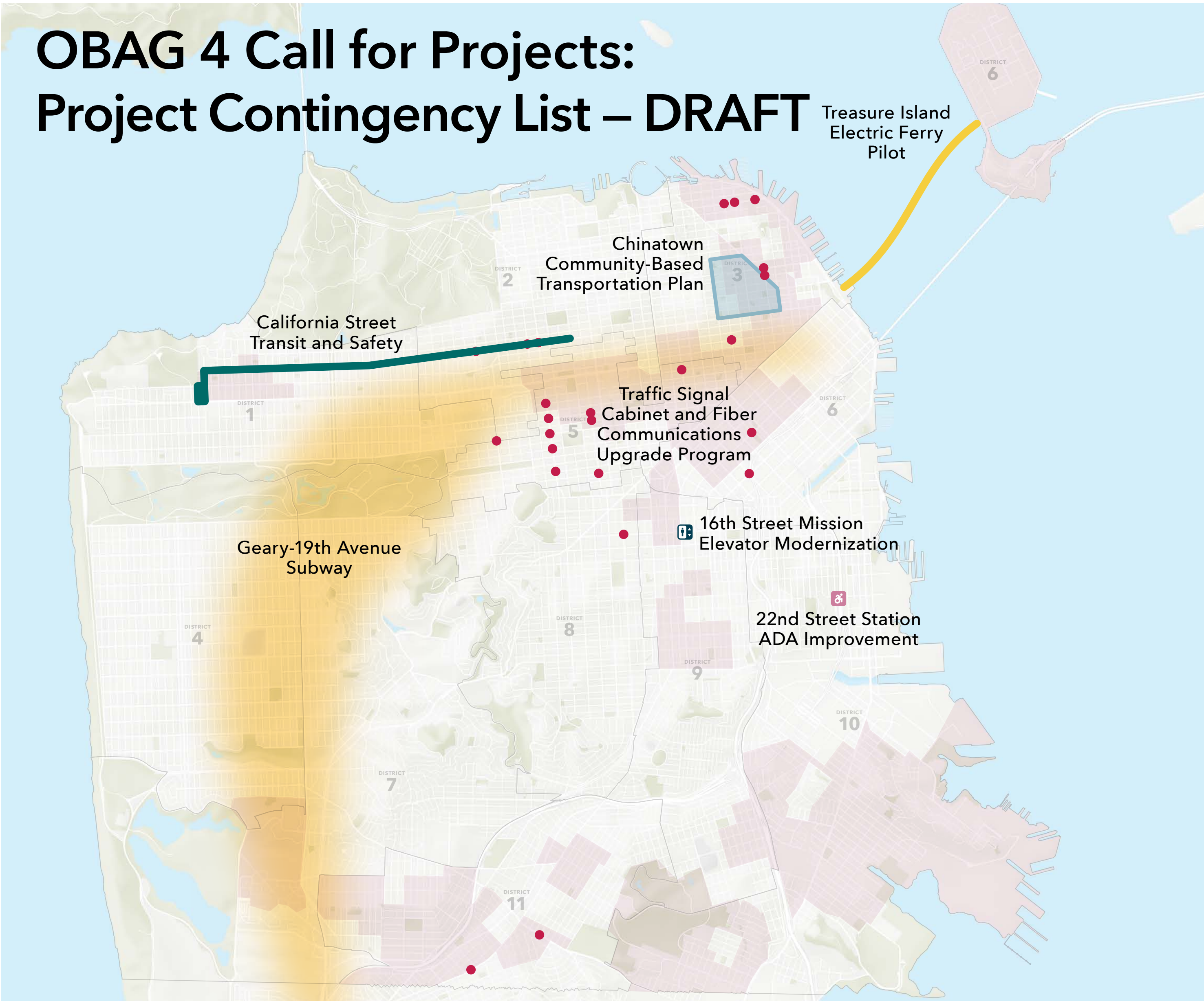
- Mission Street Safety Improvements (SFPW)
- Howard Streetscape (SFMTA)
- 16th Street Plaza Redesign (BART)
- Access for All: Downtown Curb Ramp and Access Improvements (SFPW)
- Bayview Caltrain Station (SFCTA)
- Treasure Island Electric Ferry Pilot (TIMMA) — nominated for partial funding
- Supervisor District Boundaries
- 2021 Equity Priority Communities

San Francisco County Transportation Authority

SAN FRANCISCO ONE BAY AREA GRANT CYCLE 4 (OBAG 4)

September 2026

OBAG 4 Call for Projects: Project Contingency List – DRAFT



- Treasure Island Electric Ferry Pilot (TIMMA) — nominated for remaining requested amount
- 22nd Street Station ADA Improvement (Caltrain)
- Geary-19th Avenue Subway (SFCTA)
- 16th Street Mission Elevator Modernization (BART)
- Chinatown Community-Based Transportation Plan (SFMTA)
- California Street Transit and Safety (SFMTA)
- Traffic Signal Cabinet and Fiber Communications Upgrade Program (SFMTA)
- Supervisor District Boundaries
- 2021 Equity Priority Communities

ATTACHMENT 5

San Francisco
County Transportation
Authority

BD091526 RESOLUTION NO. 27-XX

RESOLUTION ADOPTING SAN FRANCISCO'S ONE BAY AREA GRANT CYCLE 4 (OBAG 4) PROJECT NOMINATIONS

WHEREAS, In February 2026, MTC adopted the OBAG Cycle 4 framework and made $319 million in federal funds available regionwide in Fiscal Years 2026/27-2029/30 for the OBAG 4 County Program to support a wide range of projects that will advance implementation of the Regional Transportation Plan, incorporate recent MTC policy initiatives, address federal planning and programming requirements, advance equity and safety, and emphasize a partnership between MTC and county transportation agencies, like the Transportation Authority; and

WHEREAS, As the Congestion Management Agency (CMA) for San Francisco, the Transportation Authority is responsible for identifying San Francisco's OBAG Cycle 4 County Program priorities and submitting them to MTC by October 31, 2026; and

WHEREAS, By February 2027, MTC will select projects from a regionwide candidate pool and has set project nomination targets for each county based on a formula that considers population and housing (planned and produced) with San Francisco's share at 14.8% of funds available regionwide; and

WHEREAS, MTC is soliciting nominations from each county for up to 120% of its estimated share of available funding capacity to ensure a sufficient pool of project nominations; and

WHEREAS, San Francisco's estimated share of revenues is $56.7 million for the 120% target; and

WHEREAS, In April 2026, through approval of Resolution 26-52, the Transportation Authority Board adopted the OBAG 4 funding framework, including a funding distribution for San Francisco's $56.7 million 120% target that set aside: $2.15 million for CMA planning activities, $5.84 million to the San Francisco

Municipal Transportation Agency's (SFMTA's) Safe Routes to School Non-Infrastructure Program, and $48.66 million for a competitive call for projects, and;

WHEREAS, The adopted OBAG 4 funding framework also included local project screening and prioritization criteria (Attachment 1) (reflecting MTC-required criteria and additional San Francisco-specific criteria) to be used for the competitive call for projects; and

WHEREAS, Consistent with the Board-adopted OBAG 4 framework, on April 17, 2026, Transportation Authority staff issued a call for projects for $48.66 million in OBAG 4 County Program funds, and received fourteen applications from six different agencies requesting a total of $89.2 million by the July 7, 2026, deadline as summarized in Attachment 2; and

WHEREAS, Transportation Authority staff screened project submissions for eligibility and after determining that all applications received were eligible for OBAG County Program funds, then evaluated the applications by applying the Board-adopted prioritization criteria; and

WHEREAS, Transportation Authority staff recommended six projects on a Project List for the 120% Nomination Target, with all but one nominated for the full amount of OBAG funds requested, as described in Attachment 3; and

WHEREAS, The projects are listed in rank order which generally follow score order, except for SFMTA's West Portal Station Horseshoe Improvement project; and

WHEREAS, While the West Portal Station Horseshoe Improvement project scored well enough so as to have been seventh on the Project List for the 120% Nomination Target, staff recommended prioritizing the project for Prop D Transportation Network Company Tax funds to enable the project to move forward sooner, if ready; to avoid federalizing the project which triggers additional administrative and project delivery requirements; and to accommodate closer to the full OBAG amount requested for TIMMA's Treasure Island Electric Ferry Pilot within

San Francisco County Transportation Authority

the 120% nomination target given limited alternative fund sources to support transit operations; and

WHEREAS, Three of the applications received (San Francisco Public Works' Mission Street Safety Improvements, SFMTA's Howard Streetscape, and Caltrain's 22nd Street Station ADA Improvement) are for projects that also applied for or have pending grants from non-OBAG programs, and the outcomes of these pending grants could result in up to $32.23 million of San Francisco's $48.66 nomination target being fulfilled by other sources, as described in Attachment 3; and

WHEREAS, Due to these pending grants and in consultation with MTC, Transportation Authority staff recommended nominating seven projects in rank order for a Contingency List to ensure a sufficiently sized pool of San Francisco projects, and staff will coordinate with MTC to consider applying any additional or freed up OBAG 4 funds to unfunded projects in rank order, as shown in Attachment 3; and

WHEREAS, SFMTA's Digital Wayfinding and New Paratransit Software Procurement project was the lowest scoring application and is not competitive for OBAG, but is an important project for disadvantaged groups; and

WHEREAS, Staff recommended prioritizing SFMTA's Digital Wayfinding and New Paratransit Software Procurement project for prior year Prop L Paratransit program funds; and

WHEREAS, Programming and allocation of Prop D and Prop L funds are subject to future Board actions that staff anticipate will be agendized at a Board meeting later this fiscal year; and

WHEREAS, Transportation Authority staff will work with sponsors to identify alternative funding sources for projects that ultimately do not receive OBAG or other funding (e.g. from pending grants); and

WHEREAS, At its September 9, 2026 meeting, the Community Advisory Committee considered the staff recommendation and unanimously adopted a motion of support for its adoption; now, therefore, be it

San Francisco County Transportation Authority

BD091526 RESOLUTION NO. 27-XX

RESOLVED, That the Transportation Authority hereby adopts San Francisco's OBAG 4 Project Nominations, including the Project List for the 120% Nomination Target and the Contingency List, as shown in Attachment 3; and be it further

RESOLVED, That the Executive Director is hereby authorized to submit San Francisco's project nominations and required supporting materials for the OBAG 4 County Program to the MTC by its October 31, 2026 deadline.

Attachments:

1. OBAG 4 San Francisco Screening and Prioritization Criteria
2. Summary of OBAG 4 Applications Received
3. Staff Recommended OBAG 4 Nominations in Rank Order