

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

FY of Allocation Action:

Project Name:

Implementing Agency:

EXPENDITURE PLAN INFORMATION

Prop K Category:	<input type="text" value="D. TSM/Strategic Initiatives"/>	Gray cells will automatically be filled in.
Prop K Subcategory:	<input type="text" value="ii. Transportation/Land Use Coordination"/>	
Prop K EP Project/Program:	<input type="text" value="b. Transportation/Land Use Coordination"/>	
Prop K EP Line Number (Primary):	<input type="text" value="44"/>	Current Prop K Request: <input type="text" value="\$ 240,000"/>
Prop K Other EP Line Numbers:	<input type="text"/>	

Prop AA Category:

Current Prop AA Request:

Supervisorial District(s):

SCOPE

Sufficient scope detail should be provided to allow Authority staff to evaluate the reasonableness of the proposed budget and schedule. If there are prior allocations for the same project, provide an update on progress. Describe any outreach activities included in the scope. Long scopes may be provided in a separate Word file. Maps, drawings, etc. should be provided on Worksheet 7-Maps.or by inserting additional worksheets.

Project sponsors shall provide a brief explanation of how the project was prioritized for funding, highlighting: 1) project benefits, 2) level of public input into the prioritization process, and 3) whether the project is included in any adopted plans, including Prop K/Prop AA 5-Year Prioritization Program (5YPPs). Justify any inconsistencies with the adopted Prop K/Prop AA Strategic Plans and/or relevant 5YPPs.

Indicate whether work is to be performed by outside consultants and/or by force account.

Scope of work begins on next page.

**San Francisco County Transportation Authority
Proposition K Sales Tax Program Allocation Request Form**

Introduction

The Metropolitan Transportation Commission (MTC) has identified Communities of Concern (CoC) throughout the nine county Bay Area region. MTC's Community Based Transportation Planning (CBTP) grants, one of which will fund the Western Addition Community-Based Transportation Plan, are intended to support community-based planning in the CoC to help build a pipeline of projects that can compete for MTC and other funds. The objectives of MTC's CBTP grant program aligns closely with the Transportation Authority's Neighborhood Transportation Improvement Program (NTIP), which will provide the Prop K funds to match the MTC grant. The San Francisco Municipal Transportation Agency (SFMTA) requests a Prop K allocation of \$240,000 to fund the planning and conceptual engineering phases of the Western Addition Community-Based Transportation Plan project.

Project Background

The Western Addition is a traditionally underserved Community of Concern (CoC) with a high concentration of low-income housing and, as a historic center of San Francisco's African-American community, a large population of minority residents. As a legacy of urban renewal projects in the 20th century, the neighborhood has a number of wide streets, such as Geary Boulevard and Webster Street, and one-way streets, including Turk Street that encourage high vehicle speeds and are detrimental to pedestrian safety.

Project Need

The Western Addition is centrally located within San Francisco and is frequently used by through traffic. Many of the neighborhood's wide streets encourage high vehicle speeds and have been identified as high-injury corridors by Vision Zero, a policy and effort to eliminate all traffic-related fatalities by 2024. The area has one dedicated bike lane on Webster Street and two bike routes along Post and McAllister Streets, however the increasing bicycle volumes in the area warrant a need for additional bike infrastructure.

Project Description and Benefits

The Western Addition CBTP will foster collaboration between local residents, community-based organizations, and local governments as well as build community capacity by involving community-based organizations in the planning process. A key objective of the plan is to work with community partners to identify transportation needs and create a blueprint for implementation by developing and prioritizing transportation improvements from the community's perspective. In order to assess these needs, the study will include three rounds of public outreach, data collection, and the development and evaluation of up to three conceptual design alternatives. The community outreach process will involve residents in identifying and prioritizing key transportation goals in the Western Addition, such as enhanced pedestrian conditions, streetscape vitality, increased transit service efficiency, and parking management. Community members will help to identify opportunities in how to achieve those transportation goals in order to develop a conceptual plan for the area. Potential

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Proposition K Sales Tax Program Allocation Request Form**

project concepts for development could include pedestrian improvements along Geary Boulevard or traffic calming along Webster Street, Turk Street, or surrounding John Muir Elementary. The SFMTA will use the community's input to develop a final conceptual plan that will include conceptual engineering drawings along with funding and implementation strategies.

Study Area

After consulting with the District Supervisor Breed's Office, the SFMTA is working to revise and expand MTC's original study area. The Supervisor has identified community resources and areas to be included in the project area including schools, community centers, senior housing and affordable housing sites. The Supervisor has also requested streets like Geary Boulevard, Turk and Webster Streets with high vehicle speeds and pedestrian injuries be included in the study area as well. With some exceptions, the proposed study area is primarily bounded by Sutter Street to the North, Divisadero Street to the west, Fulton Street to the South, and Gough Street to the east. See map included with this allocation request form.

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Proposition K Sales Tax Program Allocation Request Form**

Tasks and Deliverables

1. Study Management and Administration and Outreach Plan	
a. Consultant Contracts and Task Orders i. Retain community based organization as outreach consultant ii. Define Consultant Tasks List	Nov. 2014 – Dec. 2014
b. Project Management	Nov. 2014 – Mar. 2017
c. Refined Work Plan and Schedule i. Internally vet scope and schedule	Nov. 2014 – Dec. 2014
d. Outreach Plan and Mailing Lists (CBO) i. Community demographics assessment ii. Assessment of best fit outreach methods and tools for community	Dec. 2014 – Feb. 2015
e. Define and Map Study Area i. Confirm MTC approval of revised study area	Nov. 2014 – Jan. 2015
2. Existing Conditions Documentation	
a. Community Activities Summary i. Review previous community outreach	Jan. 2015 – Feb. 2015
b. Existing Conditions Data and Summary i. Data Collection (crash data, traffic volume, speed data assessment) ii. Existing Multimodal Network Assessment (Inventory of existing infrastructure by mode) iii. Planned Multimodal Network Assessment (Inventory of planned project by mode)	Jan. 2015 – Jun. 2015
c. Community Meeting One and Summary (CBO) i. Develop "Transportation Goals and Priorities Exercise" ii. Create "Transportation Goals and Priorities Exercise" outreach materials iii. Community Meeting One iv. Analyze community input to establish transportation priorities and goals v. Community Outreach Meeting One Summary	Feb. 2015 – Jun. 2015
d. Develop Framework Criteria based on community goals and priorities	Apr. 2015 – Jun. 2015
3. Transportation Improvements Concepts	
a. Develop Transportation Improvement Opportunities i. Identify transportation improvements that align with community goals and priorities	Apr. 2015 – Jun. 2015
b. Community Meeting Two and Summary (CBO) i. Develop "Transportation Improvement Opportunities and Locations Exercise" ii. Create "Transportation Goals and Priorities Exercise" outreach materials iii. Community Meeting Two iv. Analyze Community input to establish transportation improvement opportunities and locations v. Community Outreach Meeting Two Summary	May 2015 – Oct. 2015
c. Maps and Graphics Supporting Transportation Improvement Opportunities	Aug. 2015 – Oct. 2015
4. Transportation Improvements Concepts Evaluation	
a. Develop Transportation Improvement Concept Designs i. Consolidate community identified opportunities to develop 2-3 conceptual designs	Aug. 2015 – Oct. 2015
b. Community Meeting Three and Summary i. Develop "Conceptual Design Evaluation Exercise" ii. Create "Conceptual Design Evaluation Exercise" outreach materials iii. Conduct Community Meeting Three iv. Analyze Community input to establish Conceptual Design v. Community Outreach Meeting Three Summary	Sep. 2015 – Feb. 2016
5. Conceptual Engineering	
a. Conceptual Plan i. Develop Conceptual Design ii. Review Conceptual Design internally iii. Revise Conceptual Design to develop Final Conceptual Design	Jan. 2016 – Sep. 2016
b. 3-5% Design Conceptual Engineering Drawings i. Collaborate with Engineers to develop 3-5% Drawings for Final Conceptual Design	Mar. 2016 – Sep. 2016

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6. Funding and Implementation Plan	
a. Implementation Plan i. Assessment Final Conceptual Design to determine Three Phases of Implementation ii. Coordinate Implementation with Planned CIP projects	Apr. 2016 – Sep. 2016
b. Funding Plan i. Calculate Implementation and Construction costs ii. Identify potential funding sources for each phase of Implementation	May 2016 – Nov. 2016
7. Final Report	
a. Initial Draft of Community Based Transportation Plan	Jul. 2016 – Nov. 2016
b. Draft Report Finalized	Sep. 2016 – Nov. 2016
c. Community Review	Nov. 2016 – Dec. 2016
d. Internal MTA Review and Approval	Oct. 2016 – Dec. 2016
e. TA Review and Approval	Dec. 2016 – Feb. 2017
f. MTC Review and Approval	Jan. 2017 – Mar. 2017

Community Outreach and Implementation

This project will be completed by SFMTA, the lead agency, and will include a robust community engagement strategy as required by the NTIP program. This strategy will be developed and prepared in close consultation with a Community Based Organization (CBO) that is included in the project budget. The SFMTA is consulting with the District Supervisor Breed’s Office to identify qualified CBOs who would coordinate the public outreach efforts for the project. The SFMTA will work with the selected CBO to develop an Outreach Plan that will identify community input needed and best practices in order to encourage community engagement. At this time there are three community meetings planned for the project, which may change as the project evolves. Each community engagement component is intended to guide the development of the plan. At the end of the process, the CBO and SFMTA will present the plan to the community.

Prioritization

The requested Prop K funds will be drawn from the Transportation/Land Use Coordination (EP 44). This project and the requested Prop K funds are included in the Board-adopted 5-Year Prioritization Program (5YPP) for Transportation and Land Use Connection using the established scoring mechanism within that 5YPP.

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

FY 2014/15

Project Name: Western Addition Community-Based Transportation Plan [NTIP Planning]

Implementing Agency: San Francisco Municipal Transportation Agency

ENVIRONMENTAL CLEARANCE

Type : N/A

**Completion Date
(mm/dd/yy)**

Status:

PROJECT DELIVERY MILESTONES

Enter dates for ALL project phases, not just for the current request. Use July 1 as the start of the fiscal year. Use 1, 2, 3, 4 to denote quarters and XXXX/XX for the fiscal year (e.g. 2010/11). Additional schedule detail may be provided in the text box below.

	Start Date		End Date	
	Quarter	Fiscal Year	Quarter	Fiscal Year
Planning/Conceptual Engineering (30%)	2	2014/2015	3	2016/17
Environmental Studies (PA&ED)				
R/W Activities/Acquisition				
Design Engineering (PS&E)				
Prepare Bid Documents				
Advertise Construction				
Start Construction (e.g., Award Contract)				
Procurement (e.g. rolling stock)				
Project Completion (i.e., Open for Use)			3	2016/17
Project Closeout (i.e., final expenses incurred)			1	2017/18

SCHEDULE COORDINATION/NOTES

Provide project delivery milestones for each sub-project in the current request and a schedule for public involvement, if appropriate. For planning efforts, provide start/end dates by task here or in the scope (Tab 1). Describe coordination with other project schedules or external deadlines (e.g., obligation deadlines) that impact the project schedule, if relevant.

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Prop K/Prop AA Allocation Request Form**

FY 2014/15

Project Name: Western Addition Community-Based Transportation Plan [NTIP Pla

Implementing Agency: San Francisco Municipal Transportation Agency

COST SUMMARY BY PHASE - CURRENT REQUEST

Allocations will generally be for one phase only. Multi-phase allocations will be considered on a case-by-case basis.

Enter the total cost for the phase or partial (but useful segment) phase (e.g. Islais Creek Phase 1 construction) covered by the CURRENT funding request.

			Cost for Current Request/Phase		
	Yes/No	Total Cost	Prop K - Current Request	Prop AA - Current Request	
Planning/Conceptual Engineering	Yes	\$ 300,000	\$ 240,000		
Environmental Studies (PA&ED)					
Design Engineering (PS&E)					
R/W Activities/Acquisition					
Construction					
Procurement (e.g. rolling stock)					
		\$ 300,000	\$ 240,000	\$ -	

COST SUMMARY BY PHASE - ENTIRE PROJECT

Show total cost for ALL project phases based on best available information. **Source of cost estimate** (e.g. 35% design, vendor quote) is intended to help gauge the quality of the cost estimate, which should improve in reliability the farther along a project is in its development.

	Total Cost	Source of Cost Estimate
Planning/Conceptual Engineering	\$ 300,000	Similar previous efforts
Environmental Studies (PA&ED)		
Design Engineering (PS&E)		
R/W Activities/Acquisition		
Construction		
Procurement (e.g. rolling stock)		
Total:	\$ 300,000	

% Complete of Design: as of

Expected Useful Life: Years

MAJOR LINE ITEM BUDGET

1. Provide a major line item budget, with subtotals by task and phase. More detail is required the farther along the project is in the development phase. Planning studies should provide task-level budget information.
2. Requests for project development should include preliminary estimates for later phases such as construction.
3. Support costs and contingencies should be called out in each phase, as appropriate. Provide both dollar amounts and % (e.g. % of construction) for support costs and contingencies.
4. For work to be performed by agency staff rather than consultants, provide base rate, overhead multiplier, and fully burdened rates by position with FTE (full-time equivalent) ratio. A sample format is provided below.
5. For construction costs, please include budget details. A sample format is provided below. Please note if work will be performed through a contract.
6. For any contract work, please provide the LBE/SBE/DBE goals as applicable to the contract.

SUMMARY BY TASK

TASK	SFMTA	CBO	TOTAL	% of phase
1. Study Management and Administration and Outreach Plan	\$ 14,899	\$ 2,343	\$ 17,242	6%
2. Existing Conditions Documentation and Community Meeting One	\$ 59,597	\$ 7,028	\$ 66,625	25%
3. Transportation Improvements Concepts and Community Meeting Two	\$ 59,597	\$ 7,028	\$ 66,625	25%
4. Transportation Improvements Concepts Evaluation and Community Meeting Three	\$ 32,282	\$ 7,028	\$ 39,310	14%
5. Conceptual Engineering	\$ 39,731	\$ -	\$ 39,731	15%
6. Funding and Implementation Plan	\$ 27,315	\$ -	\$ 27,315	10%
7. Final Report	\$ 14,899	\$ -	\$ 14,899	5%
Contract Subtotal	\$ 248,321	\$ 23,426	\$ 271,747	

Contract Contingency Rate	10%
Contract Contingency	\$ 27,174.68

TOTAL PROJECT COST	\$ 298,921
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FTE = Full Time Equivalent

Planning						
Agency: SFMTA						
Position (Title and Classification)	Hours	Hourly Base Salary	Overhead = 1.21 * Hourly Base Salary	Hourly Fully Burdened	FTE	Cost
5288 Transportation Planner II	1000	\$56.36	\$ 68.19	\$124.55	0.481	\$124,551
5290 Transportation Planner IV	400	\$77.02	\$ 93.19	\$170.20	0.192	\$68,081
1314 Public Relations Officer	65	\$60.28	\$ 72.93	\$133.21	0.031	\$8,659
9180 Manager VI	10	\$97.34	\$ 117.78	\$215.13	0.005	\$2,151
5364 Engineering Associate	20	\$52.75	\$ 63.83	\$116.58	0.010	\$2,332
5203 Assist Engineer	151	\$62.75	\$ 75.93	\$138.68	0.012	\$20,940
5207 Associate Engineer	100	\$71.80	\$ 86.88	\$158.68	0.048	\$15,868
5241 Engineer	20	\$82.50	\$ 99.82	\$182.31	0.010	\$3,646
5211 Senior Engineer	10	\$94.69	\$ 114.57	\$209.26	0.005	\$2,093
SFMTA Total	1776				0.793	\$248,321
Consultant: Unknown (Community Based Organization - CBO)						
Position (Title and Classification)	Hours	Hourly Base Salary	Overhead = 1.21 * Hourly Base Salary	Hourly Fully Burdened	FTE	Cost
Outreach Coordinator	175	\$32.00	\$ 38.72	\$70.72	0.084	\$12,376
Outreach Assistant	200	\$25.00	\$ 30.25	\$55.25	0.096	\$11,050
CBO Total	375				0.180	\$23,426

**San Francisco County Transportation Authority
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FY 2014/15

Project Name: Western Addition Community-Based Transportation Plan [NTIP Planning]

FUNDING PLAN - FOR CURRENT PROP K REQUEST

Prop K Funds Requested: \$ 240,000

5-Year Prioritization Program Amount: \$ 240,000 (enter if appropriate)

Strategic Plan Amount for Requested FY: \$ 2,359,639

If the amount requested is inconsistent (e.g., greater than) with the Prop K/Prop AA Strategic Plan amount and/or the 5-Year Prioritization Program (5YPP), provide a justification in the space below including a detailed explanation of which other project or projects will be deleted, deferred, etc. to accommodate the current request and maintain consistency with the 5YPP and/or Strategic Plan annual programming levels.

The 5-Year Prioritization Program (5YPP) amount is the amount of Prop K funds available for allocation in FY 2014/15 for the subject project in the Transportation/Land Use Coordination category.

The Strategic Plan amount is the amount programmed for the entire Transportation/Land Use Coordination category in FY 2014/15.

Enter the funding plan for the phase or phases for which Prop K/Prop AA funds are currently being requested. Totals should match those shown on the Cost worksheet.

Fund Source	Planned	Programmed	Allocated	Total
Prop K		\$ 240,000		\$ 240,000
MTC-CBTP		\$ 60,000		\$ 60,000
Prop K amount includes \$100,000 NTIP Planning funds (D5)				
Total:		\$ 300,000		\$ 300,000

Actual Prop K Leveraging - This Phase: 20.00%

Expected Prop K Leveraging per Expenditure Plan: 40.48%

\$ 300,000
Total from Cost worksheet

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Is Prop K/Prop AA providing **local match funds** for a state or federal grant?

Fund Source	\$ Amount	Required Local Match	
		%	\$
MTC CBTP	\$ 60,000	N/A	N/A

FISCAL YEAR CASH FLOW DISTRIBUTION FOR CURRENT PROP K REQUEST

Use the table below to enter the proposed cash flow distribution schedule (e.g. the maximum Prop K/Prop AA funds that are guaranteed to be available for reimbursement each fiscal year) for the current request. If the schedule is more aggressive than the Prop K/Prop AA Strategic Plan and/or 5YPP, please explain in the text box below how cash flow for other projects and programs will be slowed down to accommodate the current request without exceeding annual cash flow assumptions made in the Strategic Plan.

Prop K Funds Requested:

Sponsor Request - Proposed Prop K Cash Flow Distribution Schedule			
Fiscal Year	Cash Flow	% Reimbursed Annually	Balance
FY 2014/15	\$ 120,000	50.00%	\$ 120,000
FY 2015/16	\$ 120,000	50.00%	\$ -
Total:	\$ 240,000		

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AUTHORITY RECOMMENDATION

This section is to be completed by Authority Staff.

Last Updated: Resolution No. Res. Date:

Project Name:

Implementing Agency:

Funding Recommended:	Amount		Phase:
	Prop K Allocation	\$ 240,000	Planning/Conceptual Engineering
Total:	\$ 240,000		

Notes (e.g., justification for multi-phase recommendations, notes for multi-EP line item or multi-sponsor recommendations):

Cash Flow Distribution Schedule by Fiscal Year (for entire allocation/appropriation)

Source	Fiscal Year	Maximum Reimbursement	% Reimbursable	Balance
Prop K EP 44	FY 2014/15	\$ 96,000	40.00%	\$ 144,000
Prop K EP 44	FY 2015/16	\$ 96,000	40.00%	\$ 48,000
Prop K EP 44	FY 2016/17	\$ 48,000	20.00%	\$ -
Total:		\$ 240,000	100%	

Cash Flow Distribution Schedule by Fiscal Year & Phase (for entire allocation/appropriation)

Source	Fiscal Year	Phase	Maximum Reimbursement	Cumulative % Reimbursable	Balance
Prop K EP 44	FY 2014/15	Planning/Conceptual Engineering	\$ 96,000	40%	\$ 144,000
Prop K EP 44	FY 2015/16	Planning/Conceptual Engineering	\$ 96,000	80%	\$ 48,000
Prop K EP 44	FY 2016/17	Planning/Conceptual Engineering	\$ 48,000	100%	\$ -
Total:			\$ 240,000		

Prop K/Prop AA Fund Expiration Date: Eligible expenses must be incurred prior to this date.

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

AUTHORITY RECOMMENDATION

This section is to be completed by Authority Staff.

Last Updated: Resolution No. Res. Date:

Project Name:

Implementing Agency:

	Action	Amount	Fiscal Year	Phase
Future Commitment to:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Trigger:	<input type="text"/>			

Deliverables:

1. Quarterly progress reports shall contain a percent complete by task, percent complete for the overall project scope, summary of outreach activities and community input, in addition to the requirements described in the SGA.
2. Upon completion (once Community Based Organization is on board, anticipated TBD), provide outreach plan/strategy.
3. Upon completion of Task 2 (Existing Conditions Documentation) (anticipated June 2015), provide copy of community activities summary, existing conditions data and summary, framework criteria, and summary of community meeting one.
4. Upon completion of Task 3 (Transportation Improvements Concepts) (anticipated October 2015), provide summary of community meeting two and summary of transportation improvement options, including supporting maps and graphics.
5. Upon completion of Task 4 (Transportation Improvements Concepts Evaluation) (anticipated February 2016), provide summary of community meeting three and summary of conceptual designs.
6. Upon completion of Task 5 (Conceptual Engineering) (anticipated September 2016), provide 3-5% drawings.
7. Upon completion of Task 6 (Funding and Implementation Plan) (anticipated November 2016), provide Implementation Plan and Funding Plan.
8. Upon project completion (anticipated March 2017), SFMTA will report to the Plans and Programs Committee on key findings, recommendations, and next steps, including implementation and funding strategy. The Board will accept or approve the final report.

Special Conditions:

1. The Transportation Authority will only reimburse SFMTA up to the approved overhead multiplier rate for the fiscal year that SFMTA incurs charges.
2. The Transportation Authority will only reimburse the SFMTA after it has provided a fully executed Project Charter documenting agreements reached with all participants on the project's purpose, scope, budget, and responsibilities of all participants.

Notes:

1. This allocation request form has been updated with additional scope and budget detail since the Plans & Programs Committee meeting. The dollar amount requested has not changed.

Supervisorial District(s): Prop K proportion of expenditures - this phase:

Sub-project detail? If yes, see next page(s) for sub-project detail.

SFCTA Project Reviewer: Project # from SGA:

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

Western Addition CBTP Area Map with Affordable Housing and Schools



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

FY of Allocation Action: 2014/15 **Current Prop K Request:** \$ 240,000
Current Prop AA Request: \$ -

Project Name: Western Addition Community-Based Transportation Plan [NTIP Planning]

Implementing Agency: San Francisco Municipal Transportation Agency

Signatures

By signing below, we the undersigned verify that: 1) the requested sales tax and/or vehicle registration fee revenues shall be used to supplement and under no circumstance replace existing local revenues used for transportation purposes and 2) the requested sales tax and/or vehicle registration fee funds will not be used to cover expenses incurred prior to Authority Board approval of the allocation.

Project Manager

Grants Section Contact

Name (typed): Grahm Satterwhite

Joel C. Goldberg

Title: Complete Street Program Manager

Capital Procurement & Managemer

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415.701.4499

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Address: 1 S. Van Ness Avenue 7th Floor
San Francisco, CA 94103

1 S. Van Ness Avenue 8th Floor
San Francisco, CA 94103

Signature: _____

Date: _____
