



Memorandum

AGENDA ITEM 7

DATE: May 17, 2024

TO: Transportation Authority Board

FROM: Anna LaForte - Deputy Director for Policy and Programming

SUBJECT: 6/11/24 Board Meeting: Appropriate \$601,000 in Prop L Funds, with Conditions, and Approve Memorandum of Agreements with the San Francisco Planning Department in an Amount Not to Exceed \$150,000, and with the San Francisco Municipal Transportation Agency in an Amount Not to Exceed \$190,800 for the Fillmore-Geary Underpass Community Planning Study

<p>RECOMMENDATION <input type="checkbox"/> Information <input checked="" type="checkbox"/> Action</p> <ul style="list-style-type: none"> • Appropriate \$601,000 in Prop L Funds, with conditions for the Fillmore-Geary Underpass Community Planning Study • Approve a Memorandum of Agreement (MOA) with the San Francisco Planning Department (SF Planning) in an amount not to exceed \$150,000 • Approve an MOA with the San Francisco Municipal Transportation Agency (SFMTA) in an amount not to exceed \$190,800 • Authorize the Executive Director to negotiate agreement payment terms and non-material agreement terms and conditions <p>SUMMARY</p> <p>In 2023, the U.S. Department of Transportation awarded a \$2 million grant from Fiscal Year 2023 Reconnecting Communities and Neighborhood Program to the Transportation Authority’s Fillmore-Geary Underpass Community Planning Study (Study). We are the lead applicant and grant recipient for the Study. The SF Planning Department is a lead partner and will lead all tasks and efforts related to land use concepts. The SFMTA is a supporting partner and will work with the Transportation Authority on tasks related to</p>	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Fund Allocation <input type="checkbox"/> Fund Programming <input type="checkbox"/> Policy/Legislation <input type="checkbox"/> Plan/Study <input type="checkbox"/> Capital Project Oversight/Delivery <input type="checkbox"/> Budget/Finance <input checked="" type="checkbox"/> Contract/Agreement <input type="checkbox"/> Other: _____
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transportation concept development and implementation. Along with requesting allocation of local match funds from Prop L, we are requesting approval of an MOA between the Transportation Authority and each respective agency to allow us to reimburse their costs with federal grant and Prop L funds. Attachment 1 shows the Prop L request, including phase of work and supervisorial district. Attachment 2 provides a brief description of the project. Attachment 3 contains the staff recommendation. The recommended Prop L funds are conditioned upon Board adoption of the Prop L 5YPP for Transformative Freeway and Major Street Projects. This action is part of a separate item on this agenda.

BACKGROUND

The Study will address past harms resulting from the widening of Geary into an expressway and the associated impacts that led to displacement. The Study will use a community-led process to develop alternatives, recommend transportation, and land use concepts that reconnect the Japantown and Fillmore/Western Addition neighborhoods and create a high-quality, multimodal transportation-oriented area.

The scope would result in 10% preliminary designs of recommended transportation capital projects along with a land use concept strategy. The recommendations would include interim transportation actions to serve as stepping stones to support the long-term vision, a feasibility analysis for potential affordable housing sites and economic development strategies, anti-displacement strategies, and concept-level neighborhood urban design opportunities. The Study is anticipated to be completed by fall 2026.

DISCUSSION

Attachment 1 summarizes the request for Prop L funds, including information on proposed leveraging (i.e., stretching Prop L sales tax dollars further by matching them with other fund sources) compared with the leveraging assumptions in the Prop L Expenditure Plan. Attachment 2 includes the brief project description. Attachment 3 summarizes the staff recommendations for this request, highlighting special conditions and other items of interest. An Allocation Request Form for the project is included as Attachment 5, with more detailed information on scope, schedule, budget, funding, deliverables, and special conditions.



The Study requires coordination with SF Planning and SFMTA to complete the grant scope of work. An MOA is needed between the Transportation Authority and each respective agency to reimburse costs with the recommended Prop L appropriation and federal grant funds. Below are brief descriptions of the recommended services and amounts.

SF Planning. SF Planning will provide \$150,000 in in-kind funds and receive a total additional amount of \$150,000 in federal grant and Prop L funds to participate in Task 2 Community Collaboration and lead Task 4 Market and Feasibility Analysis, Task 6 Transportation and Land Use Concepts focusing on land use concepts, and Task 8 Urban and Architectural Guidance. By leading the land use related tasks, SF Planning will coordinate outreach materials as it related to land use considerations and participate in all outreach events, will document the feasibility of different land use types in the study area, develop draft and final land use concepts including cost estimates and policies and anti-displacement and community stabilization policies, and develop design guidance for future development and land use changes. SF Planning will lead the development of all deliverables for these tasks.

SFMTA. SFMTA will receive \$190,800 in federal grant and Prop L funds to support the following tasks, let by the Transportation Authority: Task 2 Community Collaboration, Task 3 Existing Conditions and Data Collection, Task 5 Transportation and Land Use concepts focusing on transportation concepts, Task 6 Concept Evaluation, Selection, Refinement, Task 7 Engineering and Cost Estimates, Task 8 Urban Design and Architectural Guidance, and Task 9 Funding Implementation Recommendations and Final Report. In supporting these tasks, the SFMTA will participate in community engagement events, provide technical review and input on draft and final concept designs including cost estimates, and coordinate with city agencies to develop an implementation plan that addresses project phasing. The SFMTA will have interim deliverables that will support the development of task deliverables.

FINANCIAL IMPACT

The recommended action would appropriate \$601,000 in Prop L funds, with conditions. The appropriation would be subject to the Fiscal Year Cash Flow Distribution Schedule contained in the attached Allocation Request Form.

Attachment 4 shows the Prop L Fiscal Year 2024/25 allocations and appropriations approved to date, with associated annual cash flow commitments as well as the



recommended allocation and cash flow amounts that are the subject of this memorandum.

The proposed memorandum of agreements with SF Planning and SFMTA will be funded by the federal Reconnecting Communities and Neighborhoods grant, awarded by the U.S. Department of Transportation, with in-kind and local matching funds from SF Planning and Prop L funds. Sufficient funds are included in the proposed Fiscal Year 2024/25 annual budget. Furthermore, sufficient funds will be included in future budgets to cover the recommended cash flow distributions in those fiscal years.

CAC POSITION

The CAC will consider this item at its May 22, 2024 meeting.

SUPPLEMENTAL MATERIALS

- Attachment 1 - Summary of Request
- Attachment 2 - Project Description
- Attachment 3 - Staff Recommendations
- Attachment 4 - Prop L Allocation Summary - FY 2024/25
- Attachment 5 - Allocation Request Form

Attachment 1: Summary of Requests Received

Source	EP Line No./Category ¹	Project Sponsor ²	Project Name	Current Prop L Request	Current Prop AA Request	Total Cost for Requested Phase(s)	Leveraging		Phase(s) Requested	District(s)
							Expected Leveraging by EP Line ³	Actual Leveraging by Project Phase(s) ⁴		
Prop L	23	SFCTA	Fillmore-Geary Underpass Community Planning Study	\$ 601,000	\$ -	\$ 2,750,800	91%	78%	Planning	5
TOTAL				\$ 601,000	\$ -	\$ 2,750,800				

Footnotes

¹ "EP Line No./Category" is either the Prop L Expenditure Plan line number referenced in the 2023 Prop L Strategic Plan Baseline or the Prop AA Expenditure Plan category referenced in the 2022 Prop AA Strategic Plan, including: Street Repair and Reconstruction (Street), Pedestrian Safety (Ped), and Transit Reliability and Mobility Improvements (Transit).

² Acronym: 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./ Category	Project Sponsor	Project Name	Prop L Funds Requested	Prop AA Funds Requested	Project Description
23	SFCTA	Fillmore-Geary Underpass Community Planning Study	\$ 601,000	\$ -	This study will work to address past harms resulting from the widening of Geary into an expressway and the associated impacts that led to displacement. Through a community-driven process, the Transportation Authority, in partnership with the San Francisco Planning Department and the San Francisco Municipal Transportation Agency, will develop alternatives and recommend transportation and land use concepts that reconnect the Japantown and Fillmore/Western Addition neighborhoods and create a high-quality, multimodal transportation-oriented area. Transportation Authority staff anticipate presenting the final report to the Board for approval in Fall 2026. Prop L funds are matching a \$2 million federal Reconnecting Communities and Neighborhood Program grant awarded to SFCTA.
TOTAL			\$601,000	\$0	

¹ See Attachment 1 for footnotes.

Attachment 3: Staff Recommendations ¹

EP Line No./ Category	Project Sponsor	Project Name	Prop L Funds Recommended	Prop AA Funds Recommended	Recommendations
23	SFCTA	Fillmore-Geary Underpass Community Planning Study	\$ 601,000	\$ -	Special Condition: The recommended allocation is contingent upon approval of the Transformative Freeway and Major Street Projects 5YPP and amendment of the Prop L Strategic Plan Baseline which is a separate item on this agenda.
TOTAL			\$ 601,000	\$ -	

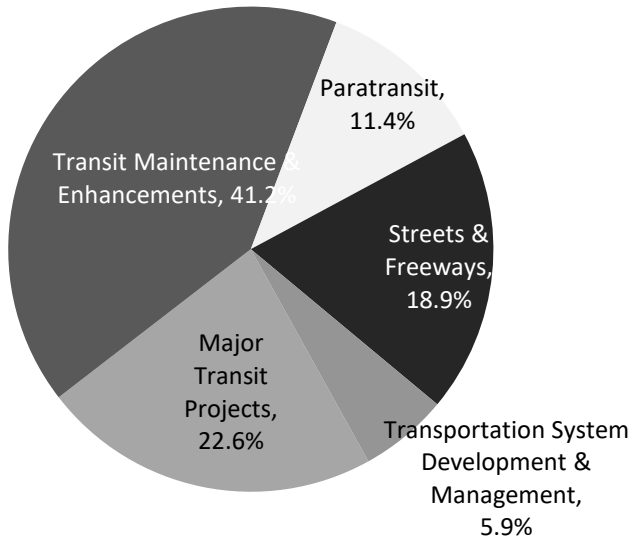
¹ See Attachment 1 for footnotes.

**Attachment 4.
Prop L Summary - FY2023/24**

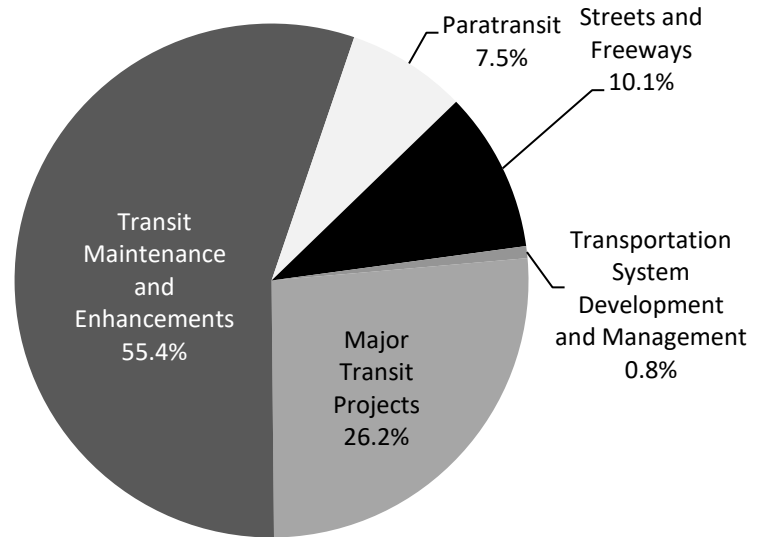
PROP L SALES TAX						
FY 2024/25	Total	FY 2024/25	FY 2025/26	FY 2026/27	FY 2027/28	FY 2028/29
Prior Allocations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Current Request(s)	\$ 601,000	\$ 300,000	\$ 301,000	\$ -	\$ -	\$ -
New Total Allocations	\$ 601,000	\$ 300,000	\$ 301,000	\$ -	\$ -	\$ -

The above table shows maximum annual cash flow for all FY 2024/25 allocations and appropriations approved to date, along with the current recommended allocations.

Prop L Expenditure Plan



Prop L Investments To Date (Including Pending Allocations)



San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2024/25
Project Name:	Fillmore-Geary Underpass Community Planning Study
Primary Sponsor:	San Francisco County Transportation Authority

EXPENDITURE PLAN INFORMATION

PROP L Expenditure Plans	Transformative Freeway and Major Street Projects
Current PROP L Request:	\$601,000
Supervisory District	District 05

REQUEST

Brief Project Description

The Fillmore-Geary Underpass Community Planning Study will address past harms resulting from the widening of Geary into an expressway and the associated impacts that led to displacement. Through a community-driven process we will develop alternatives and recommend transportation and land use concepts that reconnect the Japantown and Fillmore/Western Addition neighborhoods and create a high-quality, multimodal transportation-oriented area.

Detailed Scope, Project Benefits and Community Outreach

Purpose

Starting in the late 1940s, local agencies identified San Francisco's Fillmore/Western Addition as the site of one of the first federally funded urban renewal projects in the nation. Through the early 1960s, vast swaths of the Japantown/Fillmore area were cleared by the local redevelopment agency for new development. These actions displaced thousands of established residents and many businesses, destroyed hundreds of structures, and ruptured the social and economic fabric of the local Black, Jewish, and Japanese American communities.

The Fillmore-Geary Underpass Community Planning Study would conduct a community-driven process to re-envision the area of Geary Boulevard at Fillmore Street, along with streets in surrounding neighborhoods. Led by SFCTA in partnership with SF Planning and SFMTA this process would bring together transportation and land use to create more connected and vibrant communities, while also working towards the long-term goals to repair neighborhoods, create transit-oriented housing opportunities, and support economic and cultural stability in communities that face risks of displacement. The study would focus on an approximate one mile stretch of Geary, between Laguna and Divisadero and the neighborhoods immediately adjacent to this corridor.

Outreach for the proposed study would include contracted partnerships with community-based organizations and stipends for community participation. A diverse set of community groups from the Japantown and Fillmore/Western Addition neighborhoods support this study. A range of outreach activities would be developed in English, Korean, Spanish, Chinese, Japanese, and other relevant

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languages for the surrounding communities to reduce barriers to participation. Community involvement would use a “co-creation” model, in which public agencies work as equal partners alongside stakeholder representatives to bring the community directly into the decision-making process. Centered on community outreach and input, the proposed study would use an engagement process to co-create solutions for the study area to reflect the community’s vision and transportation needs.

The scope would result in 10% preliminary designs of recommended transportation capital projects along with a land use concept strategy. The recommendations would include interim transportation actions to serve as stepping stones to support the long-term vision, a feasibility analysis for potential affordable housing sites and economic development strategies, anti-displacement strategies, and concept-level neighborhood urban design opportunities.

The study will result in a comprehensive plan that identifies a community vision and goals, a preferred design alternative for the Geary Expressway and Fillmore Underpass, complementary near- to long-term solutions to address circulation, connectivity, and safety, land use opportunities and priorities along Geary, and an implementation framework including, costs, agency roles, and a planning level funding strategy. The study will use a community-driven process to reimagine how to redesign Geary to re-connect the Japantown/ Fillmore area through transportation improvements and urban design/land use changes. Because significant changes to this corridor would also impact travel patterns in the surrounding area, the study will include safety and connectivity improvements to ensure benefits to communities that have carried the impacts of the expressway investment.

Prop L funds would leverage a \$2 million Reconnecting Communities and Neighborhoods grant from the U.S. Department of Transportation.

Task 1 Project Management (Fall 2024-2026)

The SFCTA will hold a kick-off meeting with USDOT and agency partners to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant information for project management.

The SFCTA, in coordination with the Planning Department, will procure a consultant through a process that meets USDOT grant requirements. Although the consultant will assist with study tasks and deliverables, the SFCTA will remain primarily responsible for all deliverables and general project management.

The SFCTA will manage the project and the consultant on an ongoing basis, including submitting quarterly reports and invoices to USDOT as required by the grant.

Deliverables: Project kickoff meeting notes, Quarterly invoicing, Progress reports, Consultant contract

Task 2 Community Collaboration (Fall 2024-2026)

The community collaboration (engagement) will extend through the full length of the study to establish a corridor vision and goals, identify priorities for the area, and develop and refine study concepts.

The SFCTA will lead a competitive process to select representatives to contract with through a formal process to form a Community Council to provide guidance and liaise with the Japantown/Fillmore community throughout the project. Community Council participants will be compensated for their time, and this includes budget for these Partner Agreements. The community council will meet at key

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project milestones and support the project team in shaping outreach, gaining community participation and input, and providing feedback on draft and final plan materials. Subcommittee(s) may also be established to further support and involvement in specific phases of work by allowing partners to opt-in for more involvement based on community priorities and staff capacity.

Community outreach will happen over multiple rounds: The first round will determine community vision, goals, priorities, and challenges for the project. The second round will focus on developing and refining concept designs and associated policies, discussions on benefits and tradeoffs, and understanding community preferences for future land uses. The third round will bring plan recommendations, costs, and benefits to hear final comments that will be documented to guide future phases of work that advance the recommendation into implementation.

Outreach activities will include, but not be not limited to, in-person and/or virtual meetings, SMS and/or online surveys, design charrettes, community focus groups, community briefings at regular intervals, and pop-up style events at community destinations and events. Costs for this task include stipends for additional CBOs that would like to support the study effort by promoting surveys, outreach efforts, and organizing meetings and presentation, but do not have a partner agreement to support the outreach efforts.

The Project Team will also form a Technical Advisory Committee (TAC), to facilitate collaboration between city agencies. The TAC will meet at study milestones to review and provide feedback on draft deliverables and study actions. The TAC is expected to meet up to six times during the study: 1. project understanding and existing conditions; 2. concept development; 3. outreach round 1; 4. concept evaluation; 5. outreach round 2; 6. draft recommendations including cost estimates, urban design and architectural guidelines, and implementation plan

Deliverables: Community Coalition Partner Agreements, Outreach materials

Task 3 Data Collection and Existing Conditions (Fall 2024 - Winter 2024)

Multimodal travel data will be collected and summarized and documented in an Existing Conditions report. The report will also include an inventory of infrastructure conditions and utilities that will be necessary to guide concept development and feasibility. Existing land use conditions will discuss opportunities, including existing housing stock, non-residential uses, demographic updates, development pipeline, existing zoning and development capacity, and identification of potential development sites.

Deliverables: Data collection summaries, Draft and Final Existing Conditions Report

Task 4 Market and Feasibility Analysis (Fall 2024 - Winter 2024)

Let by the Planning Department, this task will provide development feasibility analyses to community organizations on questions of housing development (especially affordable housing), commercial and mixed development, economic development, and value capture strategies. The task would also include a review the Community Stabilization Report completed by the San Francisco Planning Department in 2020. The Community Stabilization Report contains a comprehensive inventory of existing anti-displacement policies and programs. Analysis of these policies and programs will be documented in a Land Use Market and Feasibility Analysis and will determine whether they could be further enhanced or targeted to the project area population.

Deliverables: Draft and Final Land Use Market and Feasibility Analysis Memo

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Task 5 Transportation and Land Use (Spring 2025)

Building on the community outreach process, up to 5 transportation and land use scenarios that consider the full study area will be developed. Concepts will demonstrate coordinated transportation and land use planning and the potential for high-quality transit-oriented changes around Geary and Fillmore to bring more daily services within a short walk, bike, or transit trip. The project team will develop conceptual designs, circulation plans, and supporting maps/graphics. Transportation and land use concepts will primarily focus on Geary between Laguna and Divisadero. Transportation concepts will extend into adjacent neighborhoods to ensure project benefits meet the needs of impacted communities, and do not create new transportation burdens within communities.

Deliverables: Draft concept designs (up to 5)

Task 6 Concept Evaluation, Selection, Refinement (Summer 2025 - Fall 2025)

The concepts presented in Task 5 will be refined based on community feedback. It is expected this process will reduce the total concepts based on relative level of support from the community. The project team will evaluate the remaining, refined land use and transportation scenarios, using a community-driven framework of goals and metrics. Evaluation will include an equity assessment to determine proportional benefits to the disadvantaged populations in the study area and to reduce disparities. Evaluation criteria are anticipated to include both quantitative and qualitative equity metrics. The evaluation process will be documented in a Memo of Concept Evaluation and Selection and guide the third round of outreach where a final preferred concept is presented for feedback. This concept will be further refined based on community feedback and will then be advanced into following Tasks.

Deliverables: Concept refinement of up to 5 initial concepts, Draft and Final Concept Evaluation and Selection Memo, Refined concept design of recommended scenario

Task 7 Engineering and Cost Estimates (Winter 2025 - Spring 2026)

The project team will develop 10% preliminary engineering of the recommended transportation concepts and corresponding planning-level implementation cost estimates for transportation infrastructure and land use components.

Deliverables: 10% engineering of recommended concept, Draft and final planning level cost estimates

Task 8 Urban Design and Architectural Guidance (Winter 2025 - Spring 2026)

Led by the Planning Department, this task will produce concept-level studies and guidance on site design, building massing/envelope, development yield and technical opportunities and constraints guidance on key sites and overall corridor and neighborhood urban design. All guidance will be documented in Urban Design Guidelines.

Deliverables: Draft and Final Urban Design Guidelines

Task 9 Funding Implementation Recommendations and Final Report (Summer 2026 - Fall 2026)

All project work, including outreach input, will be documented in a Final Report. The Final Report will

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include an implementation and funding plan for all recommendations. The Final Report will be presented to the SF Planning Commission, SFMTA Board, and the SFCTA Board for endorsement or adoption.

Deliverables: Final Report, Board/Commission Materials

Project Location

In the Western Addition EPC neighborhood, the project would focus on an approximate one mile stretch of Geary Blvd., between Laguna and Divisadero and the neighborhoods immediately adjacent to this corridor.

Is this project in an Equity Priority Community?	Yes
Does this project benefit disadvantaged populations?	Yes

Project Phase(s)

Planning/Conceptual Engineering (PLAN)

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	\$601,000.00

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2024/25
Project Name:	Fillmore-Geary Underpass Community Planning Study
Primary Sponsor:	San Francisco County Transportation Authority

ENVIRONMENTAL CLEARANCE

Environmental Type:	EIR/EIS
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PROJECT DELIVERY MILESTONES

Phase	Start		End	
	Quarter	Calendar Year	Quarter	Calendar Year
Planning/Conceptual Engineering (PLAN)	Jul-Aug-Sep	2024	Jul-Aug-Sep	2026
Environmental Studies (PA&ED)				
Right of Way				
Design Engineering (PS&E)				
Advertise Construction				
Start Construction (e.g. Award Contract)				
Operations (OP)				
Open for Use				
Project Completion (means last eligible expenditure)				

SCHEDULE DETAILS

Task 1 Project Management (Fall 2024-2026)

Task 2 Community Collaboration (Fall 2024-2026)

Task 3 Data Collection and Existing Conditions (Fall 2024 - Winter 2024)

Task 4 Market and Feasibility Analysis (Fall 2024 - Winter 2024)

Task 5 Transportation and Land Use (Spring 2025)

Task 6 Concept Evaluation, Selection, Refinement (Summer 2025 - Fall 2025)

Task 7 Engineering and Cost Estimates (Winter 2025 - Spring 2026)

Task 8 Urban Design and Architectural Guidance (Winter 2025 - Spring 2026)

Task 9 Funding Implementation Recommendations and Final Report (Summer 2026 - Fall 2026)

The Reconnecting Communities Grant timely use of funds deadline is an estimated 36 months from when the Transportation Authority executes the grant agreement to finish the grant.

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2024/25
Project Name:	Fillmore-Geary Underpass Community Planning Study
Primary Sponsor:	San Francisco County Transportation Authority

FUNDING PLAN - FOR CURRENT REQUEST

Fund Source	Planned	Programmed	Allocated	Project Total
EP-223: Transformative Freeway and Major Street Projects	\$601,000	\$0	\$0	\$601,000
DOT Reconnecting Communities Grant	\$0	\$0	\$2,000,000	\$2,000,000
In-Kind Funds (Planning Dept)	\$0	\$0	\$150,000	\$150,000
Phases In Current Request Total:	\$601,000	\$0	\$2,150,000	\$2,751,000

COST SUMMARY

Phase	Total Cost	PROP L - Current Request	Source of Cost Estimate
Planning/Conceptual Engineering	\$2,750,800	\$601,000	similar projects
Environmental Studies	\$0		
Right of Way	\$0		
Design Engineering	\$0		
Construction	\$0		
Operations	\$0		
Total:	\$2,750,800	\$601,000	

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

**Attachment 5
San Francisco County Transportation Authority
Prop L/Prop AA/Prop D TNC Allocation Request Form**

MAJOR LINE ITEM BUDGET

BUDGET SUMMARY

Agency	Task 1 - Project Management	Task 2 - Community Collaboration	Task 3 - Data Collection and Existing Conditions	Task 4 - Market and Feasibility Analysis	Task 5 - Transportation and Land Use	Task 6 - Concept Evaluation, Selection, Refinement	Task 7 - Engineering and Cost Estimates	Task 8 - Urban Design and Architectural Guidance	Task 9 - Funding Implementation Recommendations and Final	Total
SFCTA	\$ 39,237	\$ 249,612	\$ 116,910	\$ 20,058	\$ 166,910	\$ 84,072	\$ 154,370	\$ 35,029	\$ 35,029	\$ 901,227
SF Planning	\$ -	\$ 50,000	\$ -	\$ 75,000	\$ 100,000	\$ -	\$ -	\$ 75,000	\$ -	\$ 300,000
SFMTA	\$ -	\$ 20,803	\$ 8,500	\$ -	\$ 18,403	\$ 32,297	\$ 28,497	\$ 2,900	\$ 79,400	\$ 190,800
Consultant	\$ 40,000	\$ 500,000	\$ 115,692	\$ 75,000	\$ 75,000	\$ 100,000	\$ 75,000	\$ 150,000	\$ 50,000	\$ 1,180,692
Community Council Stipends	\$ -	\$ 30,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30,000
Contingency	\$ 143,081	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 143,081 or 5.5%
Other Direct Costs *	\$ -	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000
Total	\$ 222,318	\$ 855,415	\$ 241,102	\$ 170,058	\$ 360,313	\$ 216,369	\$ 257,867	\$ 262,929	\$ 164,429	\$ 2,750,800

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

** \$150,000 in the total budget shown for the Planning Department are in-kind funds; remaining Planning Department budget will be paid for by DOT grant funds

DETAILED LABOR COST ESTIMATE - BY AGENCY

SFMTA	Hours	Base Hourly Rate	Overhead Multiplier	Fully Burdened Hourly Cost	FTE	Total
9182 Manager VIII	65	\$ 144.03	2.46	\$ 354.05	0.02	\$ 23,013
5502 Project Manager I	36	\$ 90.50	2.46	\$ 222.85	0.01	\$ 8,022
5290 Transportation Planner IV	202	\$ 82.63	2.48	\$ 204.62	0.05	\$ 41,334
5289 Transportation Planner III	112	\$ 69.69	2.51	\$ 174.68	0.03	\$ 19,564
5288 Transportation Planner II	48	\$ 58.73	2.55	\$ 149.79	0.01	\$ 7,190
5211 Engineer	101	\$ 106.48	2.44	\$ 259.83	0.02	\$ 26,243
5207 Associate Engineer	160	\$ 80.21	2.48	\$ 199.02	0.04	\$ 31,843
5203 Assistant Engineer	112	\$ 68.28	2.51	\$ 171.41	0.03	\$ 19,198
Contingency		\$ -	\$ -	\$ -		\$14,391 or 6%
Total	836.00				0.20	\$ 190,800

SF Planning	Hours	Base Hourly Rate	Overhead Multiplier	Fully Burdened Hourly Cost	FTE	Total
Planner IV Project Supervisor	200	\$ 83.59	\$ 3.08	\$ 257.46	0.05	\$ 51,491.44
Planner III Project Manager	580	\$ 70.50	\$ 3.08	\$ 217.14	0.14	\$ 125,941.20
Planner III Architect/Urban Designer	564	\$ 70.50	\$ 3.08	\$ 217.14	0.14	\$ 122,567.50
Total	2180.46				0.52	\$ 300,000

SFCTA	Hours	Base Hourly Rate	Overhead Multiplier	Fully Burdened Hourly Cost	FTE	Total
Deputy Director	407	\$ 106.56	\$ 2.42	\$ 257.88	0.10	\$ 104,955.21
Principal Planner	1404	\$ 77.85	\$ 2.42	\$ 188.40	0.34	\$ 264,509.39
Planner	1480	\$ 57.88	\$ 2.42	\$ 140.07	0.36	\$ 207,303.01
Senior Comms	900	\$ 68.93	\$ 2.42	\$ 166.81	0.22	\$ 150,129.54
Intern	1036	\$ 28.00	\$ 2.42	\$ 67.76	0.25	\$ 70,165.48
Senior Engineer	550	\$ 78.26	\$ 2.42	\$ 189.39	0.13	\$ 104,164.06
Total	5776.50				1.39	\$ 901,227

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2024/25
Project Name:	Fillmore-Geary Underpass Community Planning Study
Primary Sponsor:	San Francisco County Transportation Authority

SFCTA RECOMMENDATION

Resolution Number:		Resolution Date:	
Total PROP L Requested:	\$601,000	Total PROP L Recommended	\$601,000

SGA Project Number:		Name:	Fillmore-Geary Underpass Community Planning Study
Sponsor:	San Francisco County Transportation Authority	Expiration Date:	03/31/2027
Phase:	Planning/Conceptual Engineering	Fundshare:	16.02%

Cash Flow Distribution Schedule by Fiscal Year

Fund Source	FY2024/25	FY2025/26	Total
PROP L EP-223	\$300,000	\$301,000	\$601,000

Deliverables

1. Quarterly progress reports shall include % complete of the funded phase, 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. Upon completion of Task 2: Community Collaboration (anticipated October 2026), provide documentation of community outreach feedback on recommendations.
3. Upon completion of Task: 3 Existing Conditions Report (anticipated October 2026), provide the final Existing Conditions report.
4. Upon completion of Task 4: Market and Feasibility Analysis (anticipated December 2024), provide the final Land Use Market and Feasibility Analysis Memo.
5. Upon completion of Task 5: Transportation and Land Use (anticipated April 2025), provide the five draft concept designs.
6. Upon completion of Task 6: Concept Evaluation, Selection, Refinement (anticipated October 2025), provide the final Concept Evaluation and Selection memo and the refined concept design of recommended scenario.
7. Upon completion of Task 7: Engineering and Cost Estimates (anticipated April 2026), provide the 10% engineering of recommended concept and the final planning level cost estimates.
8. Upon completion of Task 8: Urban Design and Architectural Guidance (anticipated Spring 2026), provide the final Urban Design Guidelines.
9. Upon completion (anticipated October 2026), SFCTA shall present the Final Report to the Board for adoption.

Special Conditions

Attachment 5

1. The recommended allocation is contingent upon approval of the Transformative Freeway and Major Street Projects 5YPP and amendment of the Prop L Strategic Plan Baseline which is a separate item on this agenda.

Metric	PROP AA	TNC TAX	PROP L
Actual Leveraging - Current Request	No PROP AA	No TNC TAX	78.15%
Actual Leveraging - This Project	No PROP AA	No TNC TAX	78.15%

San Francisco County Transportation Authority Allocation Request Form

FY of Allocation Action:	FY2024/25
Project Name:	Fillmore-Geary Underpass Community Planning Study
Primary Sponsor:	San Francisco County Transportation Authority

EXPENDITURE PLAN SUMMARY

Current PROP L Request:	\$601,000
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- 1) The requested sales tax and/or vehicle registration fee revenues will be used to supplement and under no circumstance replace existing local revenues used for transportation purposes.

Initials of sponsor staff member verifying the above statement:

AP

CONTACT INFORMATION

	Project Manager	Grants Manager
Name:	Aliza Paz	Aliza Paz
Title:	Senior Planner	Senior Planner
Phone:	(415) 522-4803	(415) 522-4803
Email:	aliza.paz@sfcta.org	aliza.paz@sfcta.org

Fillmore-Gearry Underpass Image

