



Memorandum

Date: 10.23.15 **RE:** Citizens Advisory Committee
October 28, 2015

To: Citizens Advisory Committee

From: Anna LaForte – Deputy Director for Policy and Programming *all*

Subject: **ACTION** – Adopt a Motion of Support for the Allocation of \$273,868 in Prop K funds and \$300,000 in Prop AA funds, with Conditions, Subject to the Attached Fiscal Year Cash Flow Distribution Schedules

Summary

As summarized in Attachments 1 and 2, we have three requests totaling \$273,868 in Prop K sales tax funds and \$300,000 in Prop AA vehicle registration fee funds to present to the Citizens Advisory Committee. The San Francisco Municipal Transportation Agency (SFMTA) has requested a total of \$435,000 in Prop K and Prop AA funds for design of signal upgrades at 19 intersections along the Gough Street corridor. SFMTA is also requesting \$38,868 in Prop K sales tax funds to match a California Department of Transportation Planning grant to develop and evaluate a neighborhood-based framework for engaging low-income and minority communities on transportation-related challenges. The San Francisco Planning Department is requesting \$100,000 in Neighborhood Transportation Improvement Program (NTIP) planning funds to develop recommendations for transportation demand management (TDM) measures to minimize the transportation impacts of current and future development in the Balboa Park area.

BACKGROUND

We have three requests totaling \$273,868 in Prop K sales tax funds and \$300,000 in Prop AA vehicle registration fee funds to present to the Citizens Advisory Committee (CAC) at the October 28, 2015 meeting, for potential Board approval on November 17, 2015. As shown in Attachment 1, the requests come from the following Prop K categories:

- Prop K Signals & Signs
- Prop K Transportation/ Land Use Coordination
- Prop AA Pedestrian Safety

Board adoption of a 5-Year Prioritization Program (5YPP) for Prop K and Prop AA programmatic categories is a prerequisite for allocation of funds from each of these categories.

DISCUSSION

The purpose of this memorandum is to present three Prop K (\$273,868) and Prop AA (\$300,000) requests to the CAC, and to seek a motion of support to allocate the funds as requested. Attachment 1 summarizes the requests, including information on proposed leveraging (i.e. stretching Prop K sales tax dollars further by matching them with other fund sources) compared with the leveraging assumptions in

the Prop K Expenditure Plan. Attachment 2 provides a brief description of each project. A detailed scope, schedule, budget and funding plan for each project is included in the attached Allocation Request Forms.

Staff Recommendation: Attachment 3 summarizes the staff recommendations for the requests. Transportation Authority and project sponsor staff will attend the CAC meeting to provide a brief presentation on the specific requests and to respond to any questions that the CAC may have.

ALTERNATIVES

1. Adopt a motion of support for the allocation of \$273,868 in Prop K funds and \$300,000 in Prop AA funds, with conditions, subject to the attached Fiscal Year Cash Flow Distribution Schedules, as requested.
2. Adopt a motion of support for the allocation of \$273,868 in Prop K funds and \$300,000 in Prop AA funds, with conditions, subject to the attached Fiscal Year Cash Flow Distribution Schedules, with modifications.
3. Defer action, pending additional information or further staff analysis.

FINANCIAL IMPACTS

This action would allocate \$273,868 in Fiscal Year (FY) 2015/16 Prop K sales tax funds, with conditions, and \$300,000 in FY 2015/16 Prop AA funds for a total of three requests. The allocations would be subject to the Fiscal Year Cash Flow Distribution Schedules contained in the enclosed Allocation Request Forms.

Attachment 4, Prop K/Prop AA Allocation Summaries - FY 2015/16, shows the total approved FY 2015/16 allocations to date for both programs, with associated annual cash flow commitments as well as the recommended allocations and cash flows that are the subject of this memorandum.

Sufficient funds are included in the adopted FY 2015/16 budget to accommodate the recommended actions. Furthermore, sufficient funds will be included in future fiscal year budgets to cover the recommended cash flow distribution for those respective fiscal years.

RECOMMENDATION

Adopt a motion of support for the allocation of \$273,868 in Prop K funds and \$300,000 in Prop AA funds, with conditions, subject to the attached Fiscal Year Cash Flow Distribution Schedules.

Attachments (5):

1. Summary of Applications Received
2. Project Descriptions
3. Staff Recommendations
4. Prop K 2015/16 Fiscal Year Cash Flow Distribution – Summary
5. Prop K/AA Allocation Request Forms (3)

Attachment 1: Summary of Applications Received

| Source | EP Line No./Category ¹ | Project Sponsor ² | Project Name | Current Prop K Request | Current Prop AA Request | Total Cost for Requested Phase(s) | Prop K Leveraging | | Phase(s) Requested | District |
|-----------------|-----------------------------------|------------------------------|--|------------------------|-------------------------|-----------------------------------|---|--|--------------------|----------|
| | | | | | | | Expected Leveraging by EP Line ³ | Actual Leveraging by Project Phase(s) ⁴ | | |
| Prop K, Prop AA | 33, Ped | SFMTA | Gough Corridor Signal Upgrade | \$135,000 | \$ 300,000 | \$ 435,000 | 41% | 69% | Design | 2, 5 |
| Prop K | 44 | Planning Department | Balboa Area TDM Study [NTIP Planning] | \$100,000 | | \$ 137,230 | 40% | 27% | Planning | 7 |
| Prop K | 44 | SFMTA | Ensuring Transit Service Equity through Community Engagement | \$38,868 | | \$ 338,868 | 40% | 89% | Planning | Citywide |
| TOTAL | | | | \$ 273,868 | \$ 300,000 | \$ 911,098 | 41% | 70% | | |

Footnotes

¹ "EP Line No./Category" is either the Prop K Expenditure Plan line number referenced in the 2014 Prop K Strategic Plan or the Prop AA Expenditure Plan category referenced in the 2012 Prop AA Strategic Plan, including: Street Repair and Reconstruction (Street), Pedestrian Safety (Ped), and Transit Reliability and Mobility Improvements (Transit).

² Acronyms: SFMTA (San Francisco Municipal Transportation Agency).

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

⁴ "Actual Leveraging by Project Phase" is calculated by dividing the total non-Prop K funds in the funding plan by the total cost for the requested phase or phases. If the percentage in the "Actual Leveraging" column is lower than in the "Expected Leveraging" column, the request (indicated by yellow highlighting) is leveraging fewer non-Prop K dollars than assumed in the Expenditure Plan. A project that is well leveraged overall may have lower-than-expected leveraging for an individual or partial phase.

Attachment 2: Brief Project Descriptions ¹

| EP Line No./ Category | Project Sponsor | Project Name | Prop K Funds Requested | Prop AA Funds Requested | Project Description |
|-----------------------|---------------------|---------------------------------------|------------------------|-------------------------|--|
| 33, Ped | SFMTA | Gough Corridor Signal Upgrade | \$ 135,000 | \$ 300,000 | <p>Requested funds will be used to design signal upgrades at 19 intersections along the Gough Street corridor. Of the proposed locations, 15 are on the Vision Zero high-injury network and 5 are on a Vision Zero pedestrian high-injury corridor. Signal upgrades will include larger traffic signals and mast arms at all locations, pedestrian countdown signals at 10 intersections, and audible pedestrian signals at 3 intersections. The SFMTA has coordinated the project with San Francisco Public Works' Gough Street paving project, which will install subsurface signal conduit and new curb ramps as part of the intersection upgrades. The SFMTA expects the signal upgrades will be open for use by February 2018.</p> |
| 44 | Planning Department | Balboa Area TDM Study [NTIP Planning] | \$ 100,000 | \$ - | <p>Funds will be used to engage the community, the supervisor's offices, and other relevant stakeholders to recommend transportation demand management (TDM) measures to minimize transportation impacts of potential future development at the Balboa Reservoir, current and future activity at the City College Ocean Campus, and adjacent activities in the Ingleside, Westwood Park, and Sunnyside neighborhoods. The Planning Department will lead the project in coordination the SFMTA and Mayor's Office of Economic and Workforce Development. Building on recent public participation and analyses, the project will review existing conditions, evaluate future travel demand scenarios, conduct outreach, and produce a framework to guide the TDM program for the project area. The Planning Department anticipates completing a final report by July 2016 with key findings, proposed TDM measures (i.e., a toolkit specific to study area), and an implementation and funding strategy.</p> |

Attachment 2: Brief Project Descriptions ¹

| EP Line No./ Category | Project Sponsor | Project Name | Prop K Funds Requested | Prop AA Funds Requested | Project Description |
|-----------------------|-----------------|--|------------------------|-------------------------|---|
| 44 | SFMTA | Ensuring Transit Service Equity through Community Engagement | \$ 38,868 | \$ - | Prop K funds will provide the local matching funds to a \$300,000 Caltrans Planning grant to develop a neighborhood-based framework for engaging low-income and minority communities on transit service issues and equity. SFMTA will form partnerships with key community-based organizations (CBOs), develop targeted community engagement methods in collaboration with CBOs, and provide analysis of the effectiveness of the engagement methods. SFMTA will use the process and outcomes to identify transportation-related challenges impacting selected neighborhoods, and to develop strategies to help address transportation-related social service and environmental justice issues. SFMTA anticipates completing the final report by summer 2017. |
| TOTAL | | | \$ 273,868 | \$ 300,000 | |

¹ See Attachment 1 for footnotes.

Attachment 3: Staff Recommendations ¹

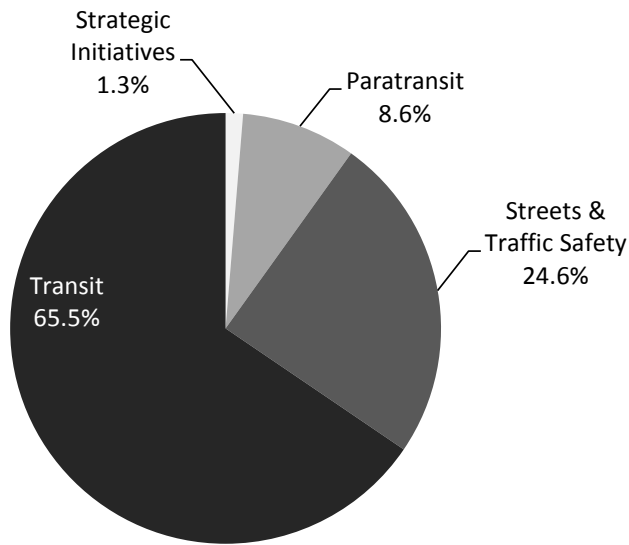
| EP Line No./ Category | Project Sponsor | Project Name | Prop K Funds Recommended | Prop AA Funds Recommended | Recommendation |
|--|------------------------|--|---------------------------------|----------------------------------|-----------------------|
| 33, Ped | SFMTA | Gough Corridor Signal Upgrade | \$ 135,000 | \$ 300,000 | |
| 44 | Planning Department | Balboa Area TDM Study [NTIP Planning] | \$ 100,000 | \$ - | |
| 44 | SFMTA | Ensuring Transit Service Equity through Community Engagement | \$ 38,868 | \$ - | |
| TOTAL | | | \$ 273,868 | \$ 300,000 | |
| ¹ See Attachment 1 for footnotes. | | | | | |

**Attachment 4.
Prop K/ Prop AA Allocation Summaries - FY 2015/16**

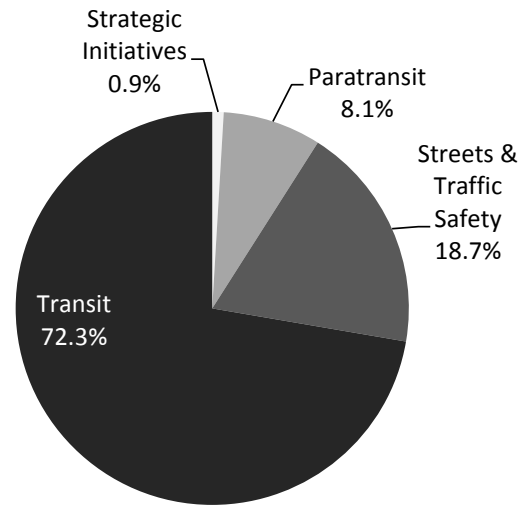
| PROP K SALES TAX | | | | | | |
|-------------------------|------------------|-------------------|-------------------|-------------------|-------------------|----------------|
| | CASH FLOW | | | | | |
| | Total | FY 2015/16 | FY 2016/17 | FY 2017/18 | FY 2018/19 | 2019/20 |
| Prior Allocations | \$ 127,837,772 | \$ 95,536,100 | \$ 31,070,078 | \$ 1,182,166 | \$ 49,428 | \$ - |
| Current Request(s) | \$ 273,868 | \$ 177,330 | \$ 80,656 | \$ 15,882 | \$ - | \$ - |
| New Total Allocations | \$ 128,111,640 | \$ 95,713,430 | \$ 31,150,734 | \$ 1,198,048 | \$ 49,428 | \$ - |

The above table shows maximum annual cash flow for all FY 2015/16 allocations approved to date, along with the current recommended

Investment Commitments, per Prop K Expenditure Plan



Prop K Investments To Date

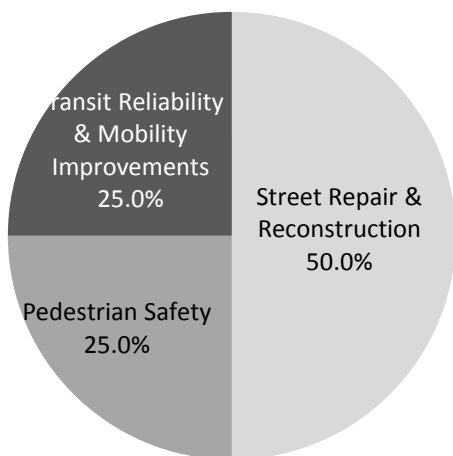


PROP AA VEHICLE REGISTRATION FEE

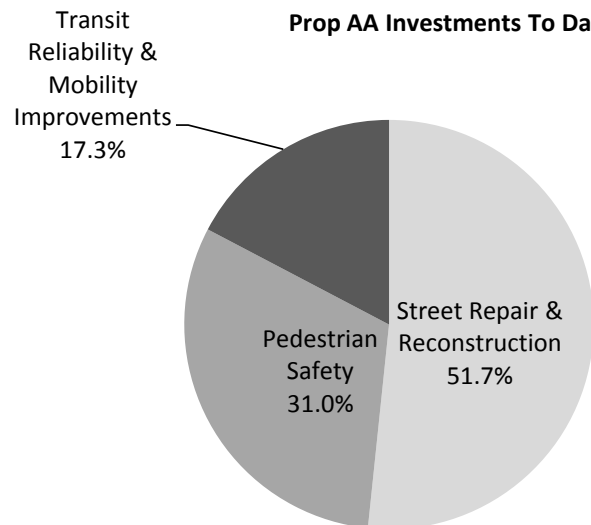
| | Total | FY 2015/16 | FY 2016/17 | FY 2017/18 | FY 2018/19 |
|-----------------------|--------------|-------------------|-------------------|-------------------|-------------------|
| Prior Allocations | \$ - | \$ - | \$ - | \$ - | \$ - |
| Current Request(s) | \$ 300,000 | \$ 150,000 | \$ 150,000 | \$ - | \$ - |
| New Total Allocations | \$ 300,000 | \$ 150,000 | \$ 150,000 | \$ - | \$ - |

The above table shows total cash flow for all FY 2015/16 allocations approved to date, along with the current recommended allocation(s).

Investment Commitments, per Prop AA Expenditure Plan



Prop AA Investments To Date



Attachment 5

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 EP Project/Program:

Prop K EP Line Number (Primary): Current Prop K Request: \$

Prop K Other EP Line Numbers:

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.

If a project is not already name 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.

See the attached pages for scope details.

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

Scope

The SFMTA is requesting \$300,000 in Proposition AA funds and \$135,000 in Prop K EP 33 funds for the design phase of full signal upgrades and Pedestrian Countdown Signals (PCS) installations on the Gough Street corridor. The total design budget would be \$435,000. A total of 19 intersections overall will be upgraded.

The signal upgrade will include new Pedestrian Countdown Signals (PCS) at 10 intersections along the Gough Street corridor. The 10 locations include Broadway, California, Eddy, Fulton, Grove, Jackson, Pacific, Page, Post, and Washington Streets. These would be funded by Prop AA funds.

Nine other intersections that already have PCS will also be upgraded to add larger more visible vehicular signal indications and overhead mast-arms: Bush, Fell, Geary, Golden Gate, McAllister, Oak, Pine, Sutter, and Turk. These would be funded by Prop K funds.

The full project scope, in addition to the new conduits and pullboxes, includes installation of:

- New wiring
- New Pedestrian Countdown Signals (PCS)
- New Accessible Pedestrian Signals (APS) pushbuttons (at Bush, Pine, and Sutter)
- New larger vehicular signal heads
- New poles and mast-arm signals
- New signal controller at Gough and Grove
- Repair of any curb ramps damaged by construction

Coordination:

SFMTA has coordinated with the Gough Street paving project (2066J) so that needed signal conduits would be installed as part of paving project. This allows for the above grade changes like poles, mast-arms, controller and PCS upgrades to be implemented without excavating within the roadway. The paving project is currently under construction and is expected to be completed early 2016.

Conduit Costs

| | | |
|---------------|------------------|--|
| Design Budget | \$69,261.27 | (Prop K, prior request) |
| Construction | <u>\$402,000</u> | (Contract 2066J, not funded by Prop K or Prop AA), |
| Total | \$499,905 | |

Implementation:

SFMTA Sustainable Streets Division will manage the scope of the detailed design. SFPW's Infrastructure Design and Construction (IDC) will manage the issuance and administration of the contract for construction by competitively bid contract.

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

| <u>Task</u> | <u>Force Account Work Performed By</u> |
|---------------------|---|
| • Design | SFMTA Sustainable Streets Division |
| • Electrical Design | SFPW-IDC |
| • Construction | SFPW- Bureau of Construction Management |

Project Benefits:

Gough Street is on the Vision Zero High Injury Network on its busiest stretch between Market and California streets. Five intersections are also on the Vision Zero High Injury Corridor for pedestrians: Gough/Turk, Gough/Geary, Gough/Sutter, Gough/Bush, Gough/Pine.

Pedestrian Countdown Signals have been effective in reducing the number of pedestrians remaining in the crosswalk at the beginning of the conflicting vehicle green light thereby reducing the potential for vehicle-pedestrian conflicts, The countdown feature of the PCS is helpful to pedestrians to discern as to whether there is enough time left in a signal cycle to cross the intersection completely.

Currently, pedestrians have to rely on vehicular signals to cross the street. New PCS will guide pedestrians and give them information for crossing the street safely. The countdown portion of the signal indication, along with the yellow and all-red interval, will be designed to accommodate a pedestrian walking at a standard walking speed of 3.5 feet per second to completely cross the street from curb to curb. APS features will be installed on all the corners to help the visually impaired receive the pedestrian indications.

At 3 intersections on Gough Street APS features will be installed on all the corners to help the visually impaired receive the pedestrian indications.

Larger signal heads and mast-arm signals will also be added to improve the visibility of the signals, especially the wider nature of Gough Street and the presence of trucks and other large vehicles on the corridor. Gough has 3 southbound lanes for most of its length. Mast-arms will help ensure that drivers have full visibility of the signals.

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

Table 1: Locations and Improvements

| I/S ID# | Intersections | Add PCS? | Add APS? | Upgrade Signals, add Mast-arms | VZ HIN? ¹ | VZ HIC – Peds ² | DESIGN PHASE Fund Source |
|---------|---------------------|----------|----------|--------------------------------|----------------------|----------------------------|--------------------------|
| 1 | Page & Gough | Yes | | Yes | Yes | | Prop AA |
| 2 | Oak & Gough | No | | Yes | Yes | | Prop K |
| 3 | Fell & Gough | No | | Yes | Yes | | Prop K |
| 4 | Grove & Gough | Yes | | Yes | Yes | | Prop AA |
| 5 | Fulton & Gough | Yes | | Yes | Yes | | Prop AA |
| 6 | McAllister & Gough | No | | Yes | Yes | | Prop K |
| 7 | Golden Gate & Gough | No | | Yes | Yes | | Prop K |
| 8 | Turk & Gough | No | | Yes | Yes | Yes | Prop AA |
| 9 | Eddy & Gough | Yes | | Yes | Yes | | Prop AA |
| 10 | Geary & Gough | No | | Yes | Yes | Yes | Prop K |
| 11 | Post & Gough | Yes | | Yes | Yes | | Prop AA |
| 12 | Sutter & Gough | No | Yes | Yes | Yes | Yes | Prop K |
| 13 | Bush & Gough | No | Yes | Yes | Yes | Yes | Prop K |
| 14 | Pine & Gough | No | Yes | Yes | Yes | Yes | Prop K |
| 15 | California & Gough | Yes | | Yes | Yes | | Prop AA |
| 16 | Washington & Gough | Yes | | Yes | | | Prop AA |
| 17 | Jackson & Gough | Yes | | Yes | | | Prop AA |
| 18 | Pacific & Gough | Yes | | Yes | | | Prop AA |
| 19 | Broadway & Gough | Yes | | Yes | | | Prop AA |

¹ These locations are on the Vision Zero High-Injury Network

² These locations are on a Vision Zero Pedestrian High-Injury Corridor

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

FY 2015/16

Project Name: Gough Corridor Signal Upgrade

Implementing Agency: San Francisco Municipal Transportation Agency

ENVIRONMENTAL CLEARANCE

Type : Categorically Exempt

Status: Not yet started

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 | | | | |
| Environmental Studies (PA&ED) | | | | |
| R/W Activities/Acquisition | | | | |
| Design Engineering (PS&E) | 2 | FY 2015/16 | 2 | FY 2016/17 |
| Prepare Bid Documents | | | | |
| Advertise Construction | 2 | FY 2016/17 | | |
| Start Construction (e.g., Award Contract) | 3 | FY 2016/17 | | |
| Procurement (e.g. rolling stock) | | | | |
| Project Completion (i.e., Open for Use) | | | 3 | FY 2017/18 |
| Project Closeout (i.e., final expenses incurred) | | | 1 | FY 2018/19 |

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.

| <u>Phase</u> | <u>Start Date</u> | <u>End Date</u> |
|----------------------------|-------------------|-----------------|
| Design | November 2015 | October 2016 |
| Advertise for Construction | December 2016 | |
| Construction Begins | March 2017 | |
| Open for Use | | February 2018 |

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

FY 2015/16

Project Name: Gough Corridor Signal Upgrade

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.

| | Yes/No | Cost for Current Request/Phase | | |
|----------------------------------|--------|--------------------------------|-----------------|---------------------------|
| | | Total Cost | Current Request | Prop AA - Current Request |
| Planning/Conceptual Engineering | | | | |
| Environmental Studies (PA&ED) | | | | |
| Design Engineering (PS&E) | Yes | \$435,000 | \$135,000 | \$300,000 |
| R/W Activities/Acquisition | | | | |
| Construction | | | | |
| Procurement (e.g. rolling stock) | | | | |
| | | \$435,000 | \$135,000 | \$300,000 |

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 | | |
| Environmental Studies (PA&ED) | | |
| Design Engineering (PS&E) | \$ 435,000 | SFMTA estimate based on similar projects |
| R/W Activities/Acquisition | | |
| Construction | \$ 2,915,000 | SFMTA estimate based on similar projects |
| Procurement (e.g. rolling stock) | | |
| Total: | \$ 3,350,000 | |

% Complete of Design: 10 as of 9/22/15
Expected Useful Life: 30 Years

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

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.

Gough Corridor Signal Upgrade

| Labor Detail Reference | Description | Cost | % of Contract Cost | Performed by |
|---|------------------------------|------------------|-----------------------------------|--|
| Intersections that require an upgrade to add PCS - to be funded by Prop AA - 10 locations | | | | |
| AA-1 | Design and Coordination | \$50,298 | | SFMTA |
| AA-2 | Detailed Electrical Design | \$90,559 | | SFMTA |
| AA-3 | Detail Review | \$130,574 | | PW |
| AA-4 | Design Contingency | \$27,143 | | PW/SFMTA Possible subsidewalk basements, major utility conflicts |
| AA-5 | City Attorney Review | \$1,000 | | CAO |
| | Design Phase Total | \$299,574 | | |
| | Prop AA Request Round | \$300,000 | | Average per intersection \$30,000 |
| Intersections that already have PCS, but require a signal visibility or other infrastructure upgrade - to be funded by Prop K - 9 locations | | | | |
| K-1 | Design and Coordination | \$23,357 | | SFMTA |
| K-2 | Detailed Electrical Design | \$41,554 | | SFMTA |
| K-3 | Detail Review | \$56,207 | | DPW |
| K-4 | Design Contingency | \$12,112 | | PW/SFMTA Possible subsidewalk basements, major utility conflicts |
| K-5 | City Attorney Review | \$1,000 | | CAO |
| | Design Phase Total | \$134,230 | | |
| | Prop K Request Round | \$135,000 | | Average per intersection \$15,000 |
| TOTAL DESIGN PHASE REQUEST | | \$435,000 | 24% | |

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

| CONSTRUCTION PHASE | | Cost-Estimate | % of Contract Cost | Performed by |
|---------------------------------|------------------------------------|----------------------|-----------------------------------|---|
| 1 | Contract Cost | \$ 1,805,000 | | Contractor |
| 2 | Contingency | \$ 270,750 | 15% | N/A |
| 3 | Controllers/APS | \$ 113,000 | 6.3% | Purchase Order |
| 4 | Elec. Service | \$ 80,000 | 4% | PG&E, DTIS, SFMTA |
| 5 | Ct Prep & SFPW Eng Support | \$ 18,050 | 1% | SFPW (Infrastructure Design and Construction) |
| 6 | Construction Engineer/Inspection | \$ 216,600 | 12% | SFPW (Infrastructure Design and Construction) |
| 8a | Public Affairs | \$ 31,588 | 12% | SFPW (Infrastructure Design and Construction) |
| 8b | Material Testing | \$ 63,175 | 12% | SFPW (Infrastructure Design and Construction) |
| 8c | Wage Check | \$ 36,100 | 12% | SFPW (Infrastructure Design and Construction) |
| 9 | Curb Ramp Construction Inspection | \$ 27,075 | 1.5% | SFPW (Streets & Highways) |
| 10 | Construction Support | \$ 252,700 | 14% | SFMTA Eng & Shops |
| | Construction Phase Subtotal | \$ 2,914,038 | | |
| | Rounded to | \$ 2,915,000 | | |
| TOTAL COST OF ALL PHASES | | \$3,350,000 | | |

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

FY 2015/16

Project Name: Gough Corridor Signal Upgrade

FUNDING PLAN - FOR CURRENT PROP K REQUEST

Prop K Funds Requested: \$135,000

5-Year Prioritization Program Amount: \$463,000 (enter if appropriate)

FUNDING PLAN - FOR CURRENT PROP AA REQUEST

Prop AA Funds Requested: \$300,000

5-Year Prioritization Program Amount: \$337,000 (enter if appropriate)

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.

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 | | \$135,000 | | \$135,000 |
| Prop AA | | \$300,000 | | \$300,000 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| Total: | \$0 | \$435,000 | \$0 | \$435,000 |

Actual Prop K Leveraging - This Phase: 68.97%

Expected Prop K Leveraging per Expenditure Plan: 41.47%

\$435,000

Total from Cost worksheet

Is Prop K/Prop AA providing **local match funds** for a state or federal grant? No

| Fund Source | \$ Amount | Required Local Match | |
|-------------|-----------|----------------------|----|
| | | % | \$ |
| | | | |
| | | | |

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

| FUNDING PLAN - FOR ENTIRE PROJECT (ALL PHASES) | | | | |
|--|----------------|-------------------|------------------|--------------|
| Enter the funding plan for all phases (environmental studies through construction) of the project. This section may be left blank if the current request covers all project phases. Totals should match those shown on the Cost worksheet. | | | | |
| Fund Source | Planned | Programmed | Allocated | Total |
| Prop K | \$100,000 | \$2,913,000 | | \$3,013,000 |
| Prop AA | | \$337,000 | | \$337,000 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| Total: | \$100,000 | \$3,250,000 | \$0 | \$ 3,350,000 |

Actual Prop K Leveraging - Entire Project:

| |
|--------|
| 10.06% |
| 41.47% |
| NA |

Expected Prop K Leveraging per Expenditure Plan:

Actual Prop AA Leveraging - Entire Project:

\$ 3,350,000
Total from Cost worksheet

| 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:

\$135,000

| Sponsor Request - Proposed Prop K Cash Flow Distribution Schedule | | | |
|--|------------------|------------------------------|----------------|
| Fiscal Year | Cash Flow | % Reimbursed Annually | Balance |
| FY 2015/16 | \$67,500 | 50.00% | \$67,500 |
| FY 2016/17 | \$67,500 | 50.00% | \$0 |
| | | 0.00% | \$0 |
| | | 0.00% | \$0 |
| | | 0.00% | \$0 |
| Total: | \$135,000 | | |

Prop AA Funds Requested:

\$300,000

| Sponsor Request - Proposed Prop AA Cash Flow Distribution Schedule | | | |
|---|------------------|------------------------------|----------------|
| Fiscal Year | Cash Flow | % Reimbursed Annually | Balance |
| FY 2015/16 | \$150,000 | 50.00% | \$150,000 |
| FY 2016/17 | \$150,000 | 50.00% | \$0 |
| | | 0.00% | \$0 |
| Total: | \$300,000 | | |

**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:

| Funding Recommended: | Amount | | Phase: |
|----------------------|-------------------|---------------------------|--------|
| | Prop K Allocation | \$135,000 | |
| Prop AA Allocation | \$300,000 | Design Engineering (PS&E) | |
| | | | |
| | | | |
| Total: | \$435,000 | | |

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 33 | FY 2015/16 | \$67,500 | 16.00% | \$367,500 |
| Prop K EP 33 | FY 2016/17 | \$67,500 | 16.00% | \$300,000 |
| Prop AA - Ped | FY 2015/16 | \$150,000 | 34.00% | \$150,000 |
| Prop AA - Ped | FY 2016/17 | \$150,000 | 34.00% | \$0 |
| | | | 0.00% | \$0 |
| Total: | | \$435,000 | 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 33 | FY 2015/16 | Design Engineering (PS&E) | \$67,500 | 16% | \$367,500 |
| Prop K EP 33 | FY 2016/17 | Design Engineering (PS&E) | \$67,500 | 31% | \$300,000 |
| Prop AA - Ped | FY 2015/16 | | \$150,000 | 66% | \$150,000 |
| Prop AA - Ped | FY 2016/17 | | \$150,000 | 100% | \$0 |
| | | | | 100% | \$0 |
| Total: | | | \$435,000 | | |

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.
2.
3.

Special Conditions:

1.
2.

Notes:

1.

Supervisory District(s):

| | |
|--|--------|
| Prop K proportion of expenditures - this phase: | 31.03% |
| Prop AA proportion of expenditures - this phase: | NA |

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**

AUTHORITY RECOMMENDATION

This section is to be completed by Authority Staff.

Last Updated: Resolution No. Res. Date:

Project Name:

Implementing Agency:

SUB-PROJECT DETAIL

Sub-Project # from SGA: Name:
Supervisorial District(s):

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

| Source | Fiscal Year | Phase | Maximum Reimbursement | Cumulative % Reimbursable | Balance |
|---------------|-------------|---------------------------|-----------------------|---------------------------|----------|
| Prop K EP 33 | FY 2015/16 | Design Engineering (PS&E) | \$67,500 | 50% | \$67,500 |
| Prop K EP 33 | FY 2016/17 | Design Engineering (PS&E) | \$67,500 | 0% | \$0 |
| | | | | 100% | \$0 |
| | | | | 100% | \$0 |
| | | | | 100% | \$0 |
| Total: | | | \$135,000 | | |

Sub-Project # from SGA: Name:
Supervisorial District(s):

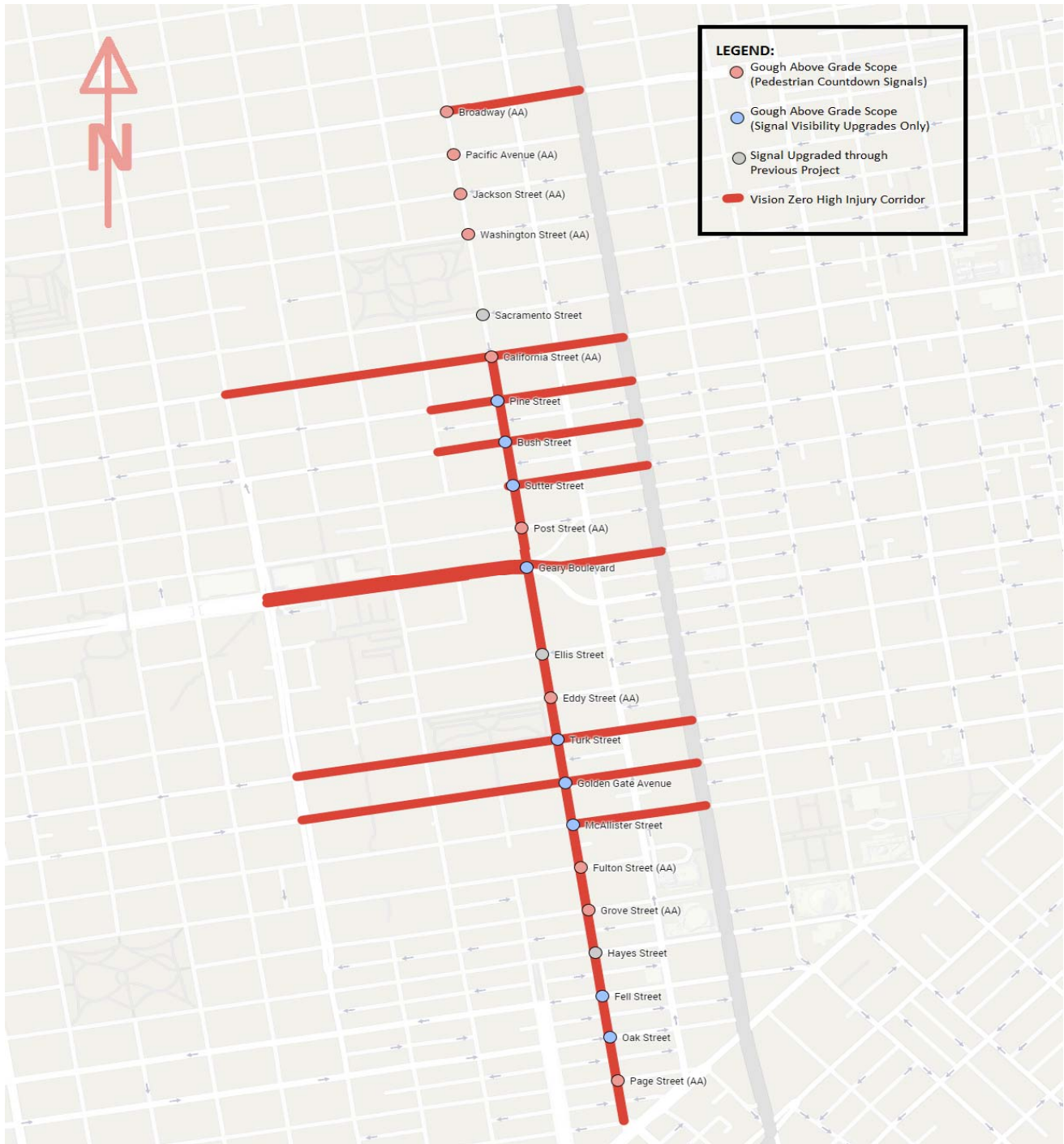
Cash Flow Distribution Schedule by Fiscal Year & Phase (for entire allocation/appropriation)

| Source | Fiscal Year | Phase | Maximum Reimbursement | Cumulative % Reimbursable | Balance |
|---------------|-------------|---------------------------|-----------------------|---------------------------|-----------|
| Prop AA - Ped | FY 2015/16 | Design Engineering (PS&E) | \$150,000 | 50% | \$150,000 |
| Prop AA - Ped | FY 2016/17 | Design Engineering (PS&E) | \$150,000 | -100% | \$0 |
| | | | | 0% | \$0 |
| | | | | 100% | \$0 |
| | | | | 100% | \$0 |
| | | | | 100% | \$0 |
| Total: | | | \$300,000 | | |

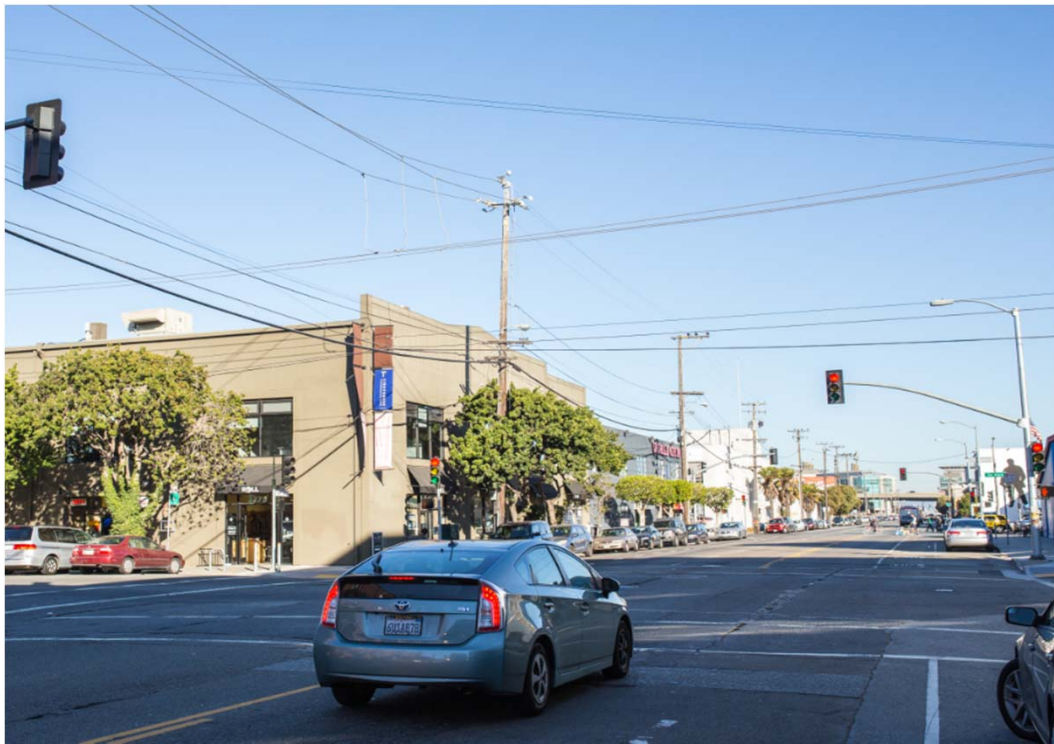
San Francisco County Transportation Authority
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MAPS AND DRAWINGS

Gough Corridor Signal Upgrade



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



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

FY of Allocation Action: 2015/16 Current Prop K Request: \$ 135,000
Current Prop AA Request: \$ 300,000

Project Name: Gough Corridor Signal Upgrade

Implementing Agency: San Francisco Municipal Transportation Agency

Project Manager

Grants Section Contact

Name (typed): Manito Velasco

Joel Goldberg

Title: Engineer

Mgr, Grants Procurement & Management

Phone: 415.701.4447

415.701.4499

Fax: _____

Email: manito.velasco@sfmta.com

joel.goldberg@sfmta.com

Address: 1 SVN, 7th Fl, SF, CA 94103

1 SVN, 7th Fl, SF, CA 94103

Signature: _____

Date: 09/25/15

09/25/15

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

FY of Allocation Action:

2015/16

Project Name:

Balboa Area TDM Study [NTIP Planning]

Implementing Agency:

Planning Department

EXPENDITURE PLAN INFORMATION

Prop K EP Project/Program:

b. Transportation/Land Use Coordination

Prop K EP Line Number (Primary):

44

Current Prop K Request:

\$ 100,000

Prop K Other EP Line Numbers:

Prop AA Category:

Current Prop AA Request:

\$ -

Supervisorial District(s):

7

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.

If a project is not already name 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.

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Proposition K Sales Tax Program Allocation Request Form**

INTRODUCTION

The area comprising Balboa Public Site (aka Balboa Reservoir) and City College (CCSF) Ocean Campus lies at a crossroads of transportation infrastructure, serves as a major education destination, and is poised for change. A number of transit improvements in the Balboa Park plan area are steadily improving transit access, MTA operations and pedestrian safety around Balboa Park station. In addition, upcoming streetscape improvements will make the public realm on Ocean Avenue more pedestrian friendly and attractive. Yet there remains a need to better understand and *manage* transportation demand.

Building on recent public participation and analyses, the San Francisco Planning Department's (Planning's) Balboa Area Transportation Demand Management (TDM) project will analyze the neighborhood's existing and future transportation demand, recommend TDM measures, and an implementation guide.

This District 7 Neighborhood Transportation Improvement Program (NTIP) planning study was developed in response to input from Supervisor Yee's office. Project deliverables and recommendations will respond to Supervisor and community concerns. The Transportation Authority's NTIP was developed to build community awareness of, and capacity to provide input to, the transportation planning process and to advance delivery of community supported neighborhood-scale projects.

PURPOSE

The Balboa area TDM Project will identify measures to minimize the transportation demand impacts of current and future development on the Balboa Public Site (see map in allocation request form), CCSF development, and neighborhood activity. The project will focus on:

- current and future CCSF activity;
- potential future Balboa Public Site activity; and
- other local trips, including those of the neighborhoods surrounding the Balboa Public Site

The project will support the goals of pedestrian safety and access to transit, affordable housing, and CCSF student enrollment.

The project will serve as a tool to aid in short-term and long-range transportation planning, and to support coordination between different jurisdictions in the Balboa area. Recommendations may be incorporated into future CEQA analysis of the Balboa Public Site, campus plans, or any related proposals required per land use law. Recommendations will be well-defined and ready for implementation if incorporated into the future development agreement for the Balboa Public Site, CCSF's master plan, a public agency work plan or an MOU between these entities. This project will not constitute an implementable "TDM Plan" for the Balboa site or for CCSF unless the plan is negotiated into an agreement(s) with a future developer (of the Balboa Public Site) and/or CCSF. However, the TDM Framework and Recommendations should be crafted for ease of

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implementation. At a minimum the framework would serve as the foundation and guide for future plans (CCSF TDM Plan) or agreements (Balboa Public Site Development Agreement) within the study. The document should streamline future TDM policy and planning in the area, and ensure that the goals, performance and monitoring of various TDM and transit planning efforts in the study area are aligned.

ROLES AND DESCRIPTION OF SERVICES

Planning will provide:

- (1) Overall Project Management and coordination
- (2) Liaison to Balboa Reservoir/Public Site outreach process

San Francisco Municipal Transportation Agency (SFMTA) will provide:

- (1) A framework to guide TDM policies, measures and implementation in the project area
- (2) Draft toolkit of TDM measures which the City of San Francisco, CCSF or a future developer of the Balboa Public Site should implement in the area, including the Ingleside, Westwood Park and Sunnyside neighborhoods
- (3) Outline of City approach to monitoring and reporting of TDM commitments

Contractor will deliver:

- (1) Existing conditions data collection and analysis, including trip generation, mode split for CCSF, and neighborhoods and uses nearby Balboa site.
- (2) Meeting facilitation and public engagement
- (3) Review of TDM framework, and additions to or input on framework with specific considerations to the project area
- (4) Review of SF TDM toolkit, and additions to or input on TDM measures for short and long terms in the project area
- (5) A proposed implementation plan, including roles, estimated costs of implementation and monitoring/reporting, opportunities, and outline of other resources needed

SCOPE OF SERVICES

1. PROJECT SCOPING

Planning requires that the scope of work for the TDM plan be reviewed and approved by SFMTA TDM Manager prior to commencement of any work by the transportation consultant for the project.

- 1.1. Consultant's project manager will meet and consult with City Team (Planning, SFMTA, and Office of Economic and Workforce Development (OEWD) to review, discuss and modify this draft scope of work prior to final approval. The discussions will focus on items such as:

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- a. Data collection (existing counts, identify if there is need for new counts, locations, time periods, etc.)
 - b. Assumptions (study area, land use types, cumulative growth, etc.)
 - c. Methodology (Trip generation methodology and appropriate sources, travel forecasts, etc.)
 - d. Proposed TDM Project relationship to the Balboa Public Site project, City College of San Francisco's Ocean Campus plans, Balboa Park Station Area Plan and neighborhood streetscape improvement plans, including the analysis of cumulative transportation conditions
 - e. Timeline
 - f. Roles and responsibilities
 - g. Role of public engagement and appropriate points for input/informing public
- 1.2. Finalize the service agreement to clearly define scope of services, deliverables, schedule, fees and payments, exclusions, liabilities, responsibilities, and insurance requirements.

Deliverables:
1.1 Scope of services, budget and schedule

2. PROJECT MANAGEMENT

Contractor will work closely with City Team project manager to coordinate the overall project plan and outreach strategy. Project management tasks include, at a minimum:

- a. Prepare and execute the Project
- b. Plan, organize and manage the day-to-day activities of the project, and coordinate technical tasks and the production of deliverables meeting the scope, schedule, cost and quality objectives
- c. Develop agendas for meetings with City Team, and distribute in advance of meetings
- d. Day-to-day communication with City Team project manager as necessary
- e. Monthly financial management of the project including review of progress to expenditures, budget, schedule, and scope, review and processing of sub-consultant charges, preparation of invoices and progress reports
- f. Public engagement plan – the consultant shall prepare and the City Team shall approve a public engagement plan for the project, with special consideration of existing Balboa Park Area Plan CAC, Balboa Reservoir CAC, ongoing neighborhood meetings, and City College projects and master planning. The engagement plan shall consider appropriate purpose for engaging public (inform, gather feedback, etc.) and appropriate strategies for engaging public (workshop, emails, website, etc.)

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- g. Conduct at least four coordination meetings with CCSF Master planners , consultants or representatives
- h. Conduct quality reviews of interim deliverables, and ensure final deliverables are quality reviewed by the Principal in charge and Project Manager
- i. Other project management duties identified by the consultant team

Deliverables:

2.1 Public engagement plan

3. NEEDS ASSESSMENT

Conduct an unbiased transportation demand management needs assessment for existing conditions and potential future land use scenarios. Assumptions for the future scenario should include City College plans and be coordinated with City Team, as described below.

Assessment should incorporate traffic data, transit routes and service, bike routes, parking counts, carshare amenities, and demand analyses from recent studies by SFMTA, SFCTA and the SFPUC. Additional data needs should be addressed in scope Task 1.

3.1. Existing Conditions

- 3.1.1. Review existing parking conditions and practices in area, including CCSF owned and leased parking facilities, metered and unmetered on-street parking, off-street publicly (or available to students/faculty) accessible parking, and residential on-street parking in adjacent neighborhoods. Review related EIRs and mitigation measures, including the Phelan Loop, Avalon and Mercy Housing developments, CCSF Master Plan, and Balboa Park Area Plan. Quantify or estimate parking supply in the project area. Assess existing TDM policy and programs, and institutional challenges and opportunities to implementing TDM in the area. *Include findings in existing conditions memo.*
- 3.1.2. Describe status of near-term or planned SFMTA service improvements and any available information related to planned changes in BART, CCSF or nearby transportation services. *Include findings in existing conditions memo.*
- 3.1.3. Refine draft transportation questionnaire for CCSF affiliates and neighborhood commuters. With City staff, conduct intercept survey (two locations for three days each) and online survey of transportation usage, needs and pricing inquiries. Summarize survey findings in existing conditions memo. *Deliverable: web-based and paper questionnaire and survey findings report*
- 3.1.4. Estimate VMT to/from neighborhood destinations based on average trip length to help benchmark the performance of recommendations made in Task 5. Clearly

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identify the various trip markets in the project area. *Include findings in existing conditions memo.*

- 3.1.5. OPTIONAL TASK: Should additional data be required and identified in Task 1 by supporting agencies, conduct relevant automobile and/or transit observations, including, but not limited to, transit delay, ridership, automobile delay, parking supply and demand, pedestrian or public realm studies, or door entry counts (assume 10 locations for budgeting purposes). *Deliverable: raw data, as determined in Task 1*
- 3.1.6. Complete a draft and final Existing Conditions Memo, with all compiled existing or gathered data including:
- A base map and text for the project area
 - A description of existing uses and vehicular access to the project area
 - A description of existing parking and loading activities, including hours of operation, supply and hourly utilization.
 - Intersection level of service (LOS) conditions during the weekday p.m. peak hour at project intersections determined in Task 1, including, but not limited to, the 12 intersections in Exhibit B
 - A qualitative assessment of pedestrian and bicyclist conditions (conflicts, safety and operational issues), based on observations and existing studies.
 - Quantitative assessment of on- and off-street parking supply and utilization within the project area during the weekday midday and late evening periods.
 - Estimation of VMT currently generated by existing land uses, to form baseline for future projects and recommendations.
 - Quantitative assessment of carshare supply within ¼ mile of the project area.

Deliverables:

3.1.1 Web and print survey and findings

3.1.2 Draft and Final Existing conditions memo

3.2. Travel Demand/VMT Calculations for Future Conditions

- 3.2.1. Determine potential future transportation demand scenarios for the Balboa Public Site, including to-be-determined short term and long-term horizons, in coordination with the Planning Department. Short-term scenario should be based on the Planning Department's development pipeline. Long-term scenarios should include the development pipeline and up to two (2) land use program alternatives for the Balboa Public site.
- 3.2.2. Determine future travel demand scenarios for City College's Ocean Campus, including short and long-term time horizons and enrollment projections, in coordination with CCSF and City staff.

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Document assumptions, methodology and results in a draft and final Travel Demand/ Future VMT Memo. For task 3.2:

- Estimate net-new trips by mode of travel and net-new VMT.
- Estimate person trips and VMT generated using SF guidelines
- Compile and estimate LOS for future scenarios at key intersections (see Exhibit B)
- Future scenarios should be “cumulative,” including all development within the project area as well as planned sustainable mode transportation network improvements.
- Estimate parking demand based on available data and projections from City of San Francisco and CCSF master planning process (including enrollment, faculty/staff changes, square footage of educational and other public facilities)

Deliverables:
3.2 Draft and Final Travel Demand/Future VMT Memo

4. Public Engagement

Building on past public participation, engage stakeholders, CACs and neighbors at appropriate times throughout the Project, using appropriate methods.

The City Team will build on past outreach efforts to neighborhood stakeholders. Past outreach efforts have gathered input from the Balboa Park Station Area CAC, the Balboa Reservoir CAC, the Excelsior Collaborative, OMI Collaborative, Westwood Park association, and Sunnyside Neighborhood Association and Ocean Avenue Association. The Balboa Park CAC unanimously endorsed the proposal for this TDM Project and will continue to stay involved throughout its execution.

The City team will work closely with Commissioners Yee and Avalos to identify additional opportunities and communities for outreach, and to catalog known issues in the planning effort areas. Potential stakeholder groups include neighborhood associations within the project area, Communities United for Health and Justice, PODER, CCSF student and faculty groups, the SF Bike Coalition, and other community organizations as identified/requested

4.1. Facilitate Any Engagement Meetings and Presentations – budget should include at least six engagement meetings, including at least one public meeting, Balboa Park Station Area CAC or Balboa Reservoir CAC meeting focused on transportation. Meetings may include, but are not limited to, CAC, City-sponsored workshops, guest speaker engagements, and/or ongoing neighborhood organization meetings. Meetings meant to inform the public or neighborhood groups may take place early in the project, before Task 3. Public engagement meetings are distinct from the CCSF meetings identified in Task 5.3.

4.2. For any public meetings/workshops: Presentation, agenda, minutes

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Deliverables:

4.1 Meeting facilitation

4.2 Presentation, agenda, minutes

5. Recommendations

The City Team will provide a framework of principles and objectives to guide the TDM program for the project area. The City Team will also provide a draft toolkit of TDM measures that may be appropriate for consideration for residential, commercial, retail, campus/institutional uses based on current practice, negotiations, and research best practices.

- 5.1. Review City Team (a) TDM framework and (b) draft toolkit of TDM strategies, propose any additions and considerations to both the framework and toolkit, in particular out of consideration for the project area and implementation by multiple agencies and entities.

Based on this review, propose specific TDM measures appropriate to address VMT impacts in the project area. Define the proposed measures, including identifying where they would be implemented, what trip markets would be served/addressed, level of deployment, cost, potential funding sources, rate of impact, timeline, and appropriate implementing agency or entity (by future developer of Balboa Reservoir public site, by CCSF, by City, or other). Inter-agency tools or agreements should also be considered and recommended in this task.

Recommendations should be justified based on VMT impact, auto trip generation, maintaining mobility, and promoting access to CCSF; while increasing non-auto mode share and other criteria as appropriate and determined by City staff and the consultant. Monitoring recommendations should use City of SF TDM monitoring approach and tailor, if necessary, to the project area and implementing entities.

- 5.2. Identify transportation gaps for future study or future concept design, such as last mile improvements, capital improvements or circulation considerations which, given expected demand, would increase access and mobility on or near the project area.
- 5.3. Within the project area and/or at Balboa Park Station (see attached map), identify land uses or public amenities to complement CCSF and future residential neighborhood which would have highest impact on reducing vehicle miles traveled. Include qualitative justification of why recommended land uses would be effective at reducing VMT or otherwise needed in the neighborhood.
- 5.4. Consultant should develop solutions related to CCSF in coordination with CCSF master planning consultants and CCSF enrollment projections, under the guidance of City Team. This should include at least four (4) coordination meetings with CCSF, its representative or consultants. The final meeting should present findings to CCSF administration and master planners.

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- 5.5. Document findings in a draft and final proposed TDM measures memo. Memo should also include how this planning effort may be used as a model for new developments and institutional master planning. The City team will coordinate with the consultant, CCSF and OEWD to identify lessons and replicable elements of the project.

Deliverables:

5.1 TDM Proposal, including

(a) Revised Framework of principles and objectives and

(b) Proposed TDM measures specific to project area, with implementation matrix

5.2 Identified transportation gaps, last mile or capital improvements for future study to increase access or mobility

5.3 Recommended land uses or public amenities recommended for reducing trips or VMT

5.4 Meeting agendas, minutes and materials

5.5 Draft and Final Proposed TDM Proposal memo

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FY 2015/16

Project Name: Balboa Area TDM Study [NTIP Planning]

Implementing Agency: Planning Department

ENVIRONMENTAL CLEARANCE

Type : n/a

Status: Not yet started

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 | 2 | FY 2015/16 | 1 | FY 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) | | | | |
| Project Closeout (i.e., final expenses incurred) | | | | |

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.

- Task 1 - Consultant scope of services, budget schedule - December 4, 2015
- Task 2 - Public Engagement Plan - by January 15, 2016
- Task 3 - Needs Assessment - January 2016- April 2016
- Task 4 - Public Engagement - February 2016 - May 2016, as determined in scope. External deadline for future meeting: Final RFP document for Balboa Reservoir Site in February 2016; Student/faculty survey in April 2016
- Task 5- Recommendations - May 2016 - July 2016

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Prop K/Prop AA Allocation Request Form**

FY 2015/16

Project Name: Balboa Area TDM Study [NTIP Planning]

Implementing Agency: Planning Department

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.

| | Yes/No | Cost for Current Request/Phase | | |
|----------------------------------|--------|--------------------------------|--------------------------|---------------------------|
| | | Total Cost | Prop K - Current Request | Prop AA - Current Request |
| Planning/Conceptual Engineering | Yes | \$137,230 | \$100,000 | |
| Environmental Studies (PA&ED) | | | | |
| Design Engineering (PS&E) | | | | |
| R/W Activities/Acquisition | | | | |
| Construction | | | | |
| Procurement (e.g. rolling stock) | | | | |
| | | \$137,230 | \$100,000 | \$0 |

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 | \$ 137,230 | Staff estimate including consultant costs |
| Environmental Studies (PA&ED) | | |
| Design Engineering (PS&E) | | |
| R/W Activities/Acquisition | | |
| Construction | | |
| Procurement (e.g. rolling stock) | | |
| Total: | \$ 137,230 | |

% Complete of Design: as of
Expected Useful Life: Years

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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.

Consultant Contract

| Task | Cost |
|--|------------------|
| 1. Project Kickoff, Scoping | \$ 3,100 |
| 2. Project Management/Public Engagement Planning | \$ 17,400 |
| 3. Needs Assessment | \$ 25,900 |
| 4. Public Engagement | \$ 21,400 |
| 5. Recommendations | \$ 17,200 |
| Contingency | \$ 10,000 |
| Materials | \$ 4,000 |
| Total | \$ 99,000 |

Planning Department Labor

| Position | Class | Hourly Rate* | Hours | FTE | Cost |
|--|-------|--------------|--------------|------------|------------------|
| Planner II | 5278 | \$ 108.15 | 50 | 0.024 | \$ 5,407 |
| Planner III | 5291 | \$ 128.41 | 102 | 0.049 | \$ 13,098 |
| Planner IV | 5293 | \$ 152.12 | 25 | 0.012 | \$ 3,803 |
| *Mandatory Fringe Benefits + Indirect = 2.45 Total Overhead Rate | | | Total | 177 | \$ 22,309 |

San Francisco Municipal Transportation Agency Labor

| Position | Class | Hourly Rate* | Hours | FTE | Cost |
|--|-------|--------------|--------------|------------|------------------|
| Manager IV | 9174 | \$ 152.56 | 100 | 0.048 | \$ 15,256 |
| *Mandatory Fringe Benefits + Indirect = 2.26 Total Overhead Rate | | | Total | 100 | \$ 15,256 |

City Attorney

| | | | |
|--------------|---------|------------|--------------------|
| Fees | 2 Hours | \$250/hour | \$ 1,000.00 |
| TOTAL | | | \$ 137,565 |

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

FY 2015/16

Project Name: Balboa Area TDM Study [NTIP Planning]

FUNDING PLAN - FOR CURRENT PROP K REQUEST

Prop K Funds Requested: \$100,000

5-Year Prioritization Program Amount: \$100,000 (enter if appropriate)

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 Prop K 5-Year Prioritization Program (5YPP) amount is the entire amount of Prop K funds available for allocation in Fiscal Year 2015/16 for the subject project in the Transportation/Land Use Coordination 5YPP.

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 | | \$100,000 | | \$100,000 |
| Priority Development Area Planning | | | \$37,230 | \$37,230 |
| | | | | \$0 |
| Total: | \$100,000 | \$37,230 | \$37,230 | \$137,230 |

Actual Prop K Leveraging - This Phase: 27.13%

Expected Prop K Leveraging per Expenditure Plan: 40.48%

\$137,230

Total from Cost worksheet

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

Is Prop K/Prop AA providing **local match funds** for a state or federal grant? No

| Fund Source | \$ Amount | Required Local Match | |
|-------------|-----------|----------------------|----|
| | | % | \$ |
| | | | |
| | | | |

| FUNDING PLAN - FOR ENTIRE PROJECT (ALL PHASES) | | | | |
|--|---------|------------|-----------|-------------|
| Enter the funding plan for all phases (environmental studies through construction) of the project. This section may be left blank if the current request covers all project phases. Totals should match those shown on the Cost worksheet. | | | | |
| Fund Source | Planned | Programmed | Allocated | Total |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| Total: | | \$0 | \$0 | \$ - |

Actual Prop K Leveraging - Entire Project: #DIV/0! **\$ 137,230**

Expected Prop K Leveraging per Expenditure Plan: 40.48% Total from Cost worksheet

| 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: \$100,000

| Sponsor Request - Proposed Prop K Cash Flow Distribution Schedule | | | |
|---|------------------|-----------------------|---------|
| Fiscal Year | Cash Flow | % Reimbursed Annually | Balance |
| FY 2015/16 | \$100,000 | 100.00% | \$0 |
| | | 0.00% | \$0 |
| | | 0.00% | \$0 |
| | | 0.00% | \$0 |
| | | 0.00% | \$0 |
| Total: | \$100,000 | | |

**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:

| Funding Recommended: | Amount | | Phase: |
|----------------------|-------------------|-----------|---------------------------------|
| | Prop K Allocation | \$100,000 | Planning/Conceptual Engineering |
| | | | |
| | | | |
| | | | |
| | | | |
| Total: | \$100,000 | | |

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 2015/16 | \$100,000 | 100.00% | \$0 |
| | | | 0.00% | \$0 |
| | | | 0.00% | \$0 |
| | | | 0.00% | \$0 |
| | | | 0.00% | \$0 |
| Total: | | \$100,000 | 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 2015/16 | Planning/Conceptual Engineering | \$100,000 | 100% | \$0 |
| | | | | 100% | \$0 |
| | | | | 100% | \$0 |
| | | | | 100% | \$0 |
| | | | | 100% | \$0 |
| Total: | | | \$100,000 | | |

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.
2.
3.

Special Conditions:

1.
2.

Notes:

1.
2.

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

MAPS AND DRAWINGS

BALBOA AREA TRANSPORTATION DEMAND MANAGEMENT PROJECT
PROJECT AREA



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

FY of Allocation Action:

2015/16

Current Prop K Request:

\$ 100,000

Current Prop AA Request:

\$ -

Project Name:

Balboa Area TDM Study [NTIP Planning]

Implementing Agency:

Planning Department

Project Manager

Grants Section Contact

Name (typed): Jeremy Shaw

Sheila Nickolopoulos

Title: Planner/Urban Designer

Sr Administrative Analyst

Phone: 415.575.9135

415.558.6409

Email: jeremy.shaw@sfgov.org

sheila.nickolopoulos@sfgov.org

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

FY of Allocation Action:

2015/16

Project Name:

Ensuring Transit Service Equity through Community Engagement

Implementing Agency:

San Francisco Municipal Transportation Agency

EXPENDITURE PLAN INFORMATION

Prop K EP Project/Program:

b. Transportation/Land Use Coordination

Prop K EP Line Number (Primary):

44

Current Prop K Request:

\$ 38,868

Prop K Other EP Line Numbers:

Prop AA Category:

Current Prop AA Request:

\$ -

Supervisorial District(s):

citywide

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.

If a project is not already name 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.

Please see attached scope document.

San Francisco County Transportation Authority
Proposition K Transportation Sales Tax Allocation Request Form
Ensuring Transit Service Equity through Community Engagement

The San Francisco Municipal Transportation Agency (SFMTA) is requesting \$38,868 in Proposition K funding for the Ensuring Transit Service Equity through Community Engagement planning project. This funding will provide the 11.47% required local match (\$38,868) to SFMTA's Fiscal Year 2015/16 Caltrans Planning grant award (\$300,000).

Background

San Francisco's Muni transit system (Muni) provides critical transit service to low-income and minority communities. However, while more than half of Muni customers are low-income (51%) and minority (58%), it has historically been difficult to engage riders of these large demographic groups in the Muni transit planning process. To address this gap in participation, the Ensuring Transit Service Equity through Community Engagement project, as proposed by SFMTA, which manages Muni, will deliver an important neighborhood-based framework to engage low-income and minority communities on transit service issues and equity. The project would provide tremendous insight on the public engagement process for SFMTA and help Muni serve as a more equitable system.

The SFMTA is continually working to improve the planning process for ensuring transportation equity in San Francisco. Improving the process for Muni is particularly important because it provides service to a disproportionate number of minority and low-income customers. While 31% of San Francisco residents are low-income, 51% of Muni customers report living in low-income households. Further, although 52% of residents in San Francisco are minorities, 58% of Muni customers self-identify as a minority. In 2014, in an effort to improve transit service and ensure that existing and future service changes are equitable, the SFMTA initiated the Muni Forward program¹ and established the Muni Service Equity Policy. The SFMTA also began efforts to develop a Muni Service Equity Strategy in support of the policy. But while these steps move toward improving equity in San Francisco, the SFMTA currently does not have the right tools and methods to engage low-income and minority communities in its equity improvement efforts. As these and other projects move forward, there is an urgent need to better understand the needs of low-income and minority communities.

SFMTA's data-based tools examine Muni service performance in great detail. However, they are not necessarily appropriate for assessing the needs and concerns of low-income and minority communities, which are often difficult to quantify and qualify by using standard methods. For example, SFMTA's systems rely on the analysis of Census data, but because the Census collects data only for home-to-work trips, SFMTA cannot use it to assess non-work trips and their related transportation challenges, which are common trips in low-income and minority neighborhoods. In addition to non-work trips, SFMTA lacks an understanding of specific night-time and early-morning work trips, as well as the overall travel experience for individuals who do not speak English as their first language. Moreover, SFMTA has found that its traditional outreach methods, which include

¹ More information at www.muniforward.com

San Francisco County Transportation Authority
Proposition K Transportation Sales Tax Allocation Request Form
Ensuring Transit Service Equity through Community Engagement

such tools as public open houses and public hearings, are often ineffective ways of reaching individuals in low-income and minority neighborhoods due to many residents' limited time availability, abnormal work schedules, child and health care-related demands, and general distrust of the public process.

Scope

The Ensuring Transit Service Equity through Community Engagement project would fill this void of information by developing new partnerships and methodologies to increase the public participation of low-income and minority communities. More specifically, the project will identify neighborhoods with the greatest needs, form partnerships with key community-based organizations (CBOs), develop targeted methods in collaboration with CBOs, and provide analysis of the effectiveness of engagement methods and the input that various communities have on transit service.

The Ensuring Transit Service Equity through Community Engagement would use a neighborhood-based approach to engage low-income and minority communities and gather input on Muni service performance. In addition, the project would use the engagement process to gauge community feedback on potential improvements and identify the major Muni transit-related challenges that impact selected neighborhoods.

SFMTA therefore wants to launch a targeted community engagement effort to enrich our analysis of neighborhood-based transit performance, understand the priority service performance issues that affect specific communities, and gauge whether or not transit performance improvement efforts that are conducted as part of the Equity Strategy improve the transit experience of low-income and minority customers. This neighborhood-based engagement project represents a unique and groundbreaking effort that could serve as a model for other transportation agencies in California. By working toward transportation quality improvements for communities in need, the community engagement effort will work to allow all San Francisco neighborhoods to enhance mobility and accessibility in target communities while serving to preserve multimodal transportation. As a result, this effort will promote the reduction of transportation-related greenhouse gases, the sustainability of multi-modal transportation in neighborhoods, and the improvement of quality of health. Additionally, with the planning, surveying, and research that its community engagement efforts will involve, SFMTA will identify strategies to optimize its transit infrastructure, evaluate the accessibility and connectivity of its multimodal transportation network, and help address transportation-related social service and environmental justice issues.

The project tasks are shown in detail in the attached table.

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

FY 2015/16

Project Name: Ensuring Transit Service Equity through Community Engagement

Implementing Agency: San Francisco Municipal Transportation Agency

ENVIRONMENTAL CLEARANCE

Type : TBD

Status: Not yet started

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 | 2 | FY 2015/16 | 4 | FY 2017/18 |
| 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) | | | | |
| Project Closeout (i.e., final expenses incurred) | | | | |

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.

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

FY 2015/16

Project Name: Ensuring Transit Service Equity through Community Engagement

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.

| | Yes/No | Cost for Current Request/Phase | | |
|----------------------------------|--------|--------------------------------|--------------------------|---------------------------|
| | | Total Cost | Prop K - Current Request | Prop AA - Current Request |
| Planning/Conceptual Engineering | Yes | \$338,868 | \$38,868 | |
| Environmental Studies (PA&ED) | | | | |
| Design Engineering (PS&E) | | | | |
| R/W Activities/Acquisition | | | | |
| Construction | | | | |
| Procurement (e.g. rolling stock) | | | | |
| | | \$338,868 | \$38,868 | \$0 |

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 | \$ 338,868 | SFMTA Staff |
| Environmental Studies (PA&ED) | | |
| Design Engineering (PS&E) | | |
| R/W Activities/Acquisition | | |
| Construction | | |
| Procurement (e.g. rolling stock) | | |
| Total: | \$ 338,868 | |

% Complete of Design: as of

Expected Useful Life: Years

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

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.

| Task | Totals | % of Project |
|---|-------------------|---------------|
| 1. Project Initiation | \$ 35,016 | 10.3% |
| 2. Community Identification and Outreach | \$ 54,219 | 16.0% |
| 3. Analyze Neighborhoods and Engagement Tools | \$ 38,405 | 11.3% |
| 4. Neighborhood Engagement | \$ 105,049 | 31.0% |
| 5. Evaluation of Findings | \$ 100,531 | 29.7% |
| 6. Fiscal Management | \$ 5,648 | 1.7% |
| TOTAL | \$ 338,868 | 100.0% |

MFB = Mandatory Fringe Benefits, FTE = Full Time Equivalent

| Position | Unburdened Salary | MFB | Overhead = 0.901 * (Salary + MFB) | Burdened Salary | FTE Ratio | Hours | Cost |
|--------------------------------|-------------------|-----------|-----------------------------------|-----------------|--------------|--------------|-------------------|
| FY16 Transit Planner IV (5290) | \$ 129,182 | \$ 69,498 | \$ 179,011 | \$ 377,691 | 0.065 | 136 | \$ 8,459 |
| FY17 Transit Planner IV (5290) | \$ 133,058 | \$ 71,583 | \$ 184,381 | \$ 389,022 | 0.086 | 180 | \$ 11,505 |
| FY18 Transit Planner IV (5290) | \$ 137,050 | \$ 73,730 | \$ 189,913 | \$ 400,693 | 0.101 | 211 | \$ 13,873 |
| FY16 Project Manager 3 (5506) | \$ 180,861 | \$ 92,133 | \$ 245,968 | \$ 518,962 | 0.047 | 97 | \$ 8,459 |
| FY17 Project Manager 3 (5506) | \$ 186,287 | \$ 94,897 | \$ 253,347 | \$ 534,531 | 0.062 | 128 | \$ 11,505 |
| FY18 Project Manager 3 (5506) | \$ 191,875 | \$ 97,744 | \$ 260,947 | \$ 550,566 | 0.072 | 150 | \$ 13,873 |
| FY16 Transit Planner 3 (5289) | \$ 108,942 | \$ 60,633 | \$ 152,787 | \$ 322,362 | 0.078 | 162 | \$ 8,459 |
| FY17 Transit Planner 3 (5289) | \$ 112,211 | \$ 62,452 | \$ 157,371 | \$ 332,033 | 0.103 | 213 | \$ 11,505 |
| FY18 Transit Planner 3 (5289) | \$ 115,577 | \$ 64,325 | \$ 162,092 | \$ 341,994 | 0.120 | 250 | \$ 13,873 |
| FY16 Jr. Admin Analyst (1820) | \$ 68,352 | \$ 43,181 | \$ 100,491 | \$ 212,024 | 0.062 | 129 | \$ 4,230 |
| FY17 Jr. Admin Analyst (1820) | \$ 70,402 | \$ 44,477 | \$ 103,506 | \$ 218,385 | 0.082 | 170 | \$ 5,752 |
| FY18 Jr. Admin Analyst (1820) | \$ 72,514 | \$ 45,811 | \$ 106,611 | \$ 224,936 | 0.096 | 199 | \$ 6,937 |
| FY16 Muni Operators (9163) | \$ 63,413 | \$ 44,519 | \$ 97,247 | \$ 205,180 | 0.133 | 277 | \$ 8,459 |
| FY17 Muni Operators | \$ 65,316 | \$ 45,855 | \$ 100,165 | \$ 211,335 | 0.176 | 366 | \$ 11,505 |
| FY18 Muni Operators | \$ 67,275 | \$ 47,230 | \$ 103,170 | \$ 217,675 | 0.206 | 429 | \$ 13,873 |
| Subtotal SFMTA Labor | | | | | 1.489 | 3,098 | \$ 152,266 |

| | |
|---|----------------|
| Consultants (Time and Materials) | 186,102 |
|---|----------------|

| | |
|--|------------|
| City Attorney Fees = 2 hours @ \$250/hr | 500 |
|--|------------|

| | |
|--------------|-------------------|
| TOTAL | \$ 338,868 |
|--------------|-------------------|

| | |
|------------------------------|------------------|
| Total Prop K Request: | \$ 38,868 |
|------------------------------|------------------|

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

FY 2015/16

Project Name: Ensuring Transit Service Equity through Community Engagement

FUNDING PLAN - FOR CURRENT PROP K REQUEST

Prop K Funds Requested: \$38,868

5-Year Prioritization Program Amount: \$150,000 (enter if appropriate)

FUNDING PLAN - FOR CURRENT PROP AA REQUEST

Prop AA Funds Requested: \$0

5-Year Prioritization Program Amount: (enter if appropriate)

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 Fiscal Year 2015/16 for the Planning Grant Match (e.g. Caltrans Planning Grants) in the Transportation/Land Use Coordination 5YPP.

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 Sales Tax | | \$38,868 | | \$38,868 |
| Caltrans Planning Grant | | | \$300,000 | \$300,000 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| Total: | \$38,868 | \$300,000 | \$300,000 | \$338,868 |

Actual Prop K Leveraging - This Phase: 88.53%

Expected Prop K Leveraging per Expenditure Plan: 40.48%

\$338,868
Total from Cost worksheet

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

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

Yes - Prop K

| Fund Source | \$ Amount | Required Local Match | |
|-------------------|-----------|----------------------|-------------|
| | | % | \$ |
| Caltrans Planning | \$300,000 | 11.47% | \$38,868.00 |
| | | | |

FUNDING PLAN - FOR ENTIRE PROJECT (ALL PHASES)

Enter the funding plan for all phases (environmental studies through construction) of the project. This section may be left blank if the current request covers all project phases. Totals should match those shown on the Cost worksheet.

| Fund Source | Planned | Programmed | Allocated | Total |
|---------------|---------|------------|-----------|-------|
| | | | | |
| | | | | |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| | | | | \$0 |
| Total: | | \$0 | \$0 | \$ - |

Actual Prop K Leveraging - Entire Project:

Expected Prop K Leveraging per Expenditure Plan:

Actual Prop AA Leveraging - Entire Project:

Total from Cost worksheet

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:

\$38,868

Sponsor Request - Proposed Prop K Cash Flow Distribution Schedule

| Fiscal Year | Cash Flow | % Reimbursed Annually | Balance |
|---------------|-----------------|-----------------------|----------|
| FY 2015/16 | \$9,830 | 25.00% | \$29,038 |
| FY 2016/17 | \$13,156 | 34.00% | \$15,882 |
| FY 2017/18 | \$15,882 | 41.00% | \$0 |
| | | 0.00% | \$0 |
| | | 0.00% | \$0 |
| Total: | \$38,868 | | |

**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:

| Funding Recommended: | Amount | | Phase: |
|----------------------|-------------------|----------|---------------------------------|
| | Prop K Allocation | \$38,868 | Planning/Conceptual Engineering |
| | | | |
| | | | |
| | | | |
| | | | |
| Total: | \$38,868 | | |

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 2015/16 | \$9,830 | 25.00% | \$29,038 |
| Prop K EP 44 | FY 2016/17 | \$13,156 | 34.00% | \$15,882 |
| Prop K EP 44 | FY 2017/18 | \$15,882 | 41.00% | \$0 |
| | | | 0.00% | \$0 |
| | | | 0.00% | \$0 |
| Total: | | \$38,868 | 100% | |

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

| Source | Fiscal Year | Phase | Maximum Reimbursement | Cumulative % Reimbursable | Balance |
|---------------|-------------|-------|-----------------------|---------------------------|----------|
| Same as above | | | | 0% | \$38,868 |
| | | | | 0% | \$38,868 |
| | | | | 0% | \$38,868 |
| | | | | 0% | \$38,868 |
| | | | | 0% | \$38,868 |
| Total: | | | \$0 | | |

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.
2.
3.
4.

Special Conditions:

1.
2.

Notes:

1.
2.

Supervisory District(s):

| | |
|--|--------|
| Prop K proportion of expenditures - this phase: | 11.47% |
| Prop AA proportion of expenditures - this phase: | NA |

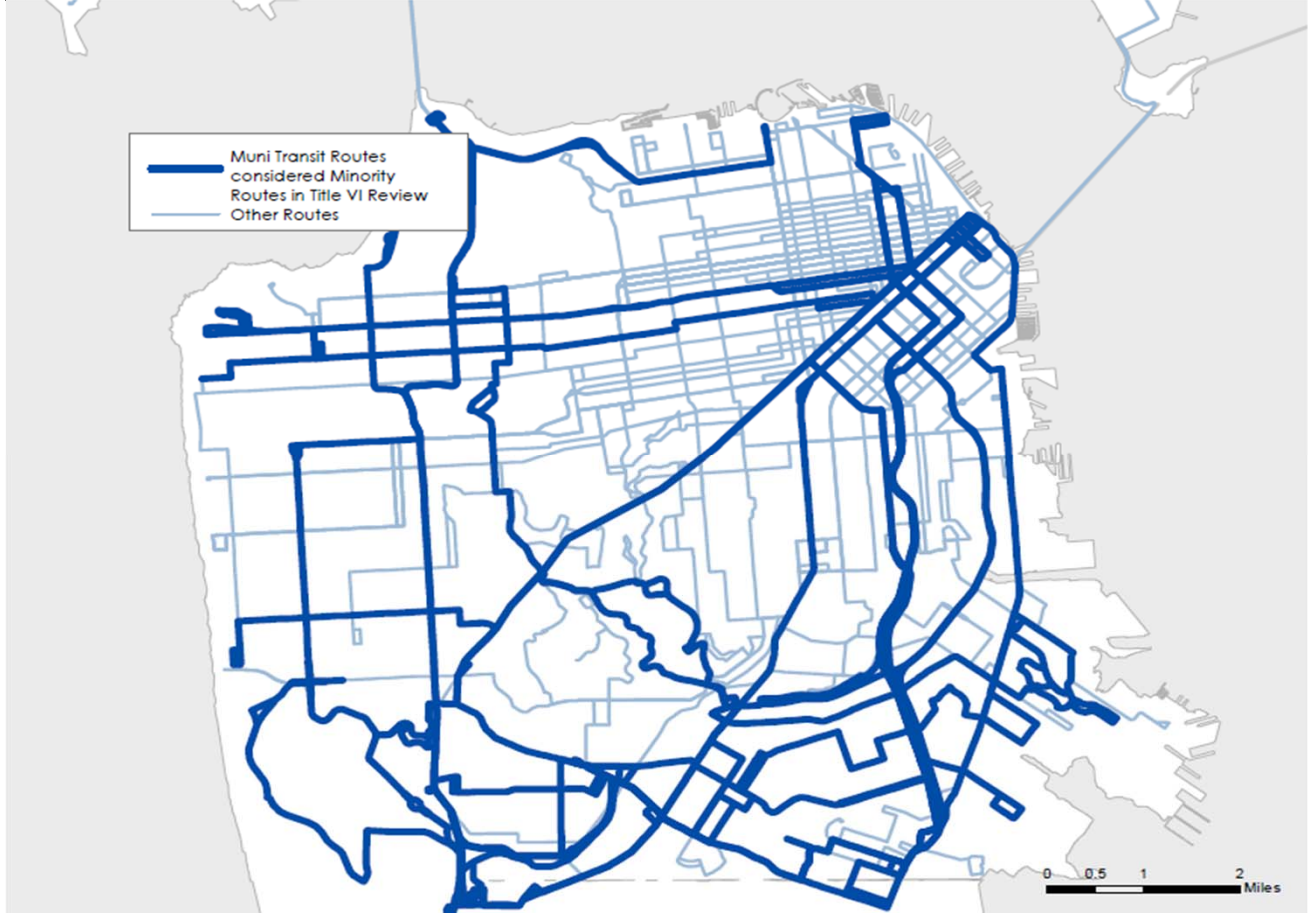
Sub-project detail? If yes, see next page(s) for sub-project detail.

SFCTA Project Reviewer:

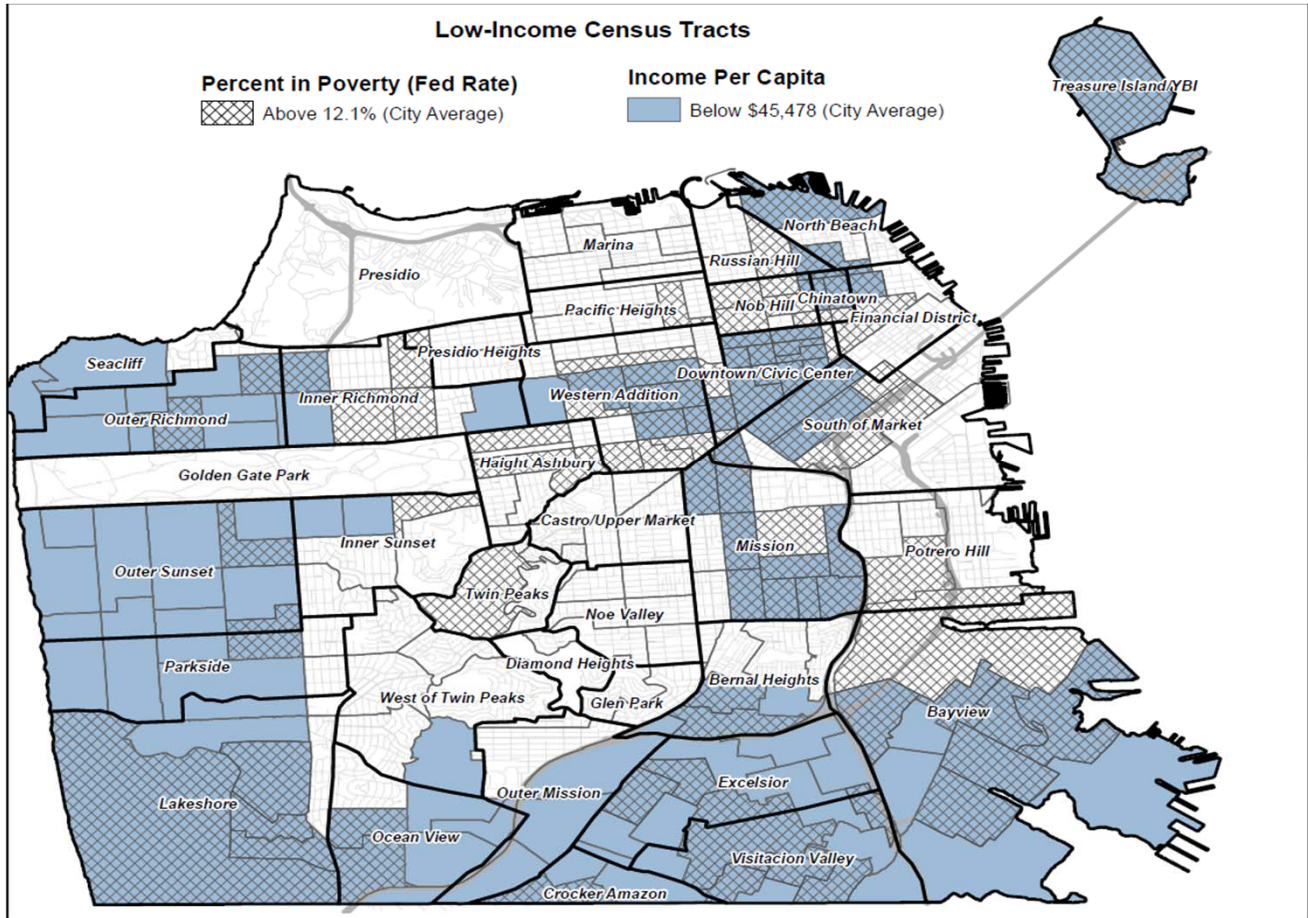
Project # from SGA:

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

MAPS AND DRAWINGS



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



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

FY of Allocation Action:

2015/16

Current Prop K Request:

\$ 38,868

Current Prop AA Request:

\$ -

Project Name:

Ensuring Transit Service Equity through Community Engagement

Implementing Agency:

San Francisco Municipal Transportation Agency

Project Manager

Grants Section Contact

Name (typed): Sandra Padilla

Timothy Manglicmot

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