



AGENDA

PLANS AND PROGRAMS COMMITTEE Meeting Notice

Date: Tuesday, May 17, 2016; 10:30 a.m.
Location: Committee Room 263, City Hall
Commissioners: Tang (Chair), Farrell (Vice Chair), Avalos, Breed, Peskin and Wiener (Ex Officio)

Clerk: Steve Stamos

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1.	Roll Call	
2.	Citizens Advisory Committee Report – INFORMATION*	5
3.	Approve the Minutes of the April 19, 2016 Meeting – ACTION*	11
4.	Recommend Appointment of Two Members to the Geary Corridor Bus Rapid Transit Citizens Advisory Committee – ACTION*	19

The Transportation Authority has a 13-member Geary Corridor Bus Rapid Transit (BRT) Citizens Advisory Committee (GCAC). There are two vacancies on the GCAC for a representative of the Richmond area and a representative of at-large interests. The vacancies are due to the term expirations of Margie Hom Brown and Jonathan Foerster, who are both not seeking reappointment. After issuing notices seeking applicants to the GCAC over the past year, we have received applications from 35 candidates. Staff provides information on applicants but does not make recommendations on GCAC appointments. Attachment 1 contains a summary table with information about current and prospective GCAC members, showing neighborhood of residence, neighborhood of employment, affiliation, and other information provided by the applicants.

5.	Recommend Allocation of \$9,599,451 in Prop K Funds, with Conditions, for Three Requests, Subject to the Attached Fiscal Year Cash Flow Distribution Schedules – ACTION*	27
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As summarized in Attachments 1 and 2, we have three requests totaling \$9,599,451 in Prop K funds to present to the Plans and Programs Committee. The San Francisco Municipal Transportation Agency (SFMTA) is requesting \$5 million in Prop K funds and a commitment to allocate another \$6.6 million to leverage Federal Transit Administration funds for the procurement of 33 60-foot New Flyer electric trolley coaches. The committed funds would be available for allocation once the SFMTA secures the remaining federal funds for the project. The SFMTA has also requested \$4,400,000 in Prop K funds for planning and design work to renovate its Burke Avenue industrial building to increase the efficiency of the central warehouse for its Materials Management section and to provide a new headquarters for its Overhead Lines group. Finally, the SFMTA has requested \$199,451 in Prop K Neighborhood Transportation Improvement Program (NTIP) capital funds for bicycle and pedestrian safety improvements on Arguello Boulevard, including bike lane striping, continental crosswalks and design of sidewalk bulbouts to be constructed through the paving project in 2017.

6.	Major Capital Projects Update – Muni Radio Replacement Project – INFORMATION* 95	
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The San Francisco Municipal Transportation Agency (SFMTA) has embarked on a project to replace and

modernize its radio communications system, some elements of which date back to the 1970s. The Muni Radio Replacement Project will do much more than its name implies. It will integrate Muni's communications with Intelligent Transportation Systems components; incorporate up-to-date technological features such as expanded data transmission and simulcasting; and integrate multiple vehicle information systems. By replacing antiquated systems, the SFMTA will be able to improve transit operations and reliability across all modes of service. With a contribution of \$61.7 million, Prop K sales tax is the largest funding source for the \$128 million project. In June 2012, the SFMTA issued the notice-to-proceed to Harris Corp, the design-build contractor and sole bidder. We are pleased to report that construction, testing and configuration is nearing completion at the radio base stations. Construction is also taking place at 16 aboveground locations and the Metro subway system. Four above ground radio base stations have been completed and are on-the-air. All base stations are in the system setup and configuration stage. The antenna cable installation in the Metro tunnel has been 99% completed. Work is also underway at the subway stations and the above-ground yard and central control facility installations. The SFMTA estimates that the installation of the full rubber-tire fleet will be completed by September 2016. For the new LRVs, factory testing is scheduled for June 2016 and installation will take place from September 2016 to January 2017. The original contract schedule called for construction to be completed in September 2015 and had a budget of \$116.4 million. However, schedule delays and difficulties experienced by the contractor (e.g. ensuring compatibility with all five Muni modes, staffing issues) have contributed to a budget increase to \$128.0 million and a Final Switchover anticipated in March 2017.

7. Update on the San Francisco Municipal Transportation Agency's Bike Program – INFORMATION* 99

At the April 19 Plans and Programs Committee meeting, Commissioner Avalos requested a presentation on the San Francisco Municipal Transportation Agency's (SFMTA's) bike program including, but not limited to how the next generation of bike projects will interface with Bay Area Bike Share. Staff from SFMTA will also present on the recently adopted bicycle Capital Improvement Program, describe the process for identifying projects, provide details about some of the key bicycle projects, and discuss how the program is funded.

8. Update on Project Performance Results for Plan Bay Area 2040 and Regional Housing Agenda – INFORMATION* 119

The Metropolitan Transportation Commission (MTC) and the Association of Bay Area Governments (ABAG) are currently developing Plan Bay Area 2040 (PBA 2040), the Bay Area's Regional Transportation Plan/Sustainable Communities Strategy that adopts a land use vision and a transportation system to govern the region's growth and investment through 2040. In October 2015 the Transportation Authority adopted goals and objectives for our participation in the PBA 2040 process and approved a list of projects and programs for MTC and ABAG to consider for inclusion in PBA 2040. Since then the agencies have adopted goals and performance measures, ABAG has released draft growth scenarios for review, and MTC has been evaluating how the largest of the nominated projects perform in moving the region toward its targets. At the May Plans and Programs Committee meeting, we will provide an update on MTC's PBA project performance assessment and a look ahead at related items we anticipate bringing before the Citizens Advisory Committee, Plans and Programs Committee and Board as MTC and ABAG move toward adoption of the final preferred scenario, anticipated this September. We will also provide an update on the latest information MTC has produced on advancing the regional housing agenda in the near term through the One Bay Area Grant program and longer-term strategies to improve housing affordability and prevent displacement. More detail is provided in the attached presentation (Attachment 1) and MTC's memo provided to its Commission in April (Attachment 2).

9. Introduction of New Items – INFORMATION

During this segment of the meeting, Committee members may make comments on items not specifically listed above, or introduce or request items for future consideration.

10. Public Comment

11. Adjournment

* Additional materials

Plans and Programs Committee Meeting Agenda

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DRAFT MINUTES

CITIZENS ADVISORY COMMITTEE

Wednesday, April 27, 2016

1. Committee Meeting Call to Order

Chair Waddling called the meeting to order at 6:03 p.m.

CAC members present were Myla Ablog, Becky Hogue, Brian Larkin, John Larson, Santiago Lerma, Jacqueline Sachs, Peter Sachs, Peter Tannen (entered during Item 6) and Chris Waddling.

Transportation Authority staff members present were Michelle Beaulieu, Amber Crabbe, Anna LaForte, Maria Lombardo, Mike Pickford, Steve Rehn and Luis Zurinaga (Consultant).

2. Chair's Report – INFORMATION

Chair Waddling encouraged CAC members to watch the video of the Bay Area Bike Share update presented at the April 19 Plans and Programs Committee, which was available on SFGovTV. He said that prior to the meeting, four CAC members had attended a tour of the San Francisco Municipal Transportation Agency's (SFMTA's) Transportation Management Center, led by Project Manager Frank Lau. He said that SFMTA and New Flyer were working on a glare shield for the interior lights on new buses, as suggested by CAC member Peter Tannen, which he noted was an example of how input from the CAC was important.

Consent Calendar

3. Approve the Minutes of the March 23, 2016 Meeting – ACTION

4. Accounting Report and Investment Report for the Nine Months Ending March 31, 2016 – INFORMATION

5. State and Federal Legislative Update – INFORMATION

Chair Waddling noted that Assembly Bill (AB) 1641 would allow local authorities to permit commuter shuttle services to use transit stops, and asked under what authority the SFMTA permitted its existing program. Maria Lombardo, Chief Deputy Director, replied that the Board had also discussed this topic. She referenced Transportation Authority Chair Wiener's comments noting that state law already granted the SFMTA the necessary authority for the program. She said that she believed the intention of AB1641 per the author was to clarify the existing law.

During public comment, Edward Mason said that the current law used to justify the commuter shuttle program was actually intended for school buses.

Roland LeBrun said that the Santa Clara Valley Transportation Authority had a different shuttle system than San Francisco, as Google picked up riders at light-rail stations, bypassing downtown San Jose altogether.

Peter Sachs moved to approve the Consent Calendar, seconded by Brian Larkin.

The Consent Calendar was approved by the following vote:

Ayes: CAC Members Ablog, Hogue, Larkin, Larson, Lerma, J. Sachs, P. Sachs and Waddling

Absent: CAC Members Morrison and Tannen

End of Consent Calendar

6. Adopt a Motion of Support for Allocation of \$9,599,451 in Prop K Funds, with Conditions, for Three Requests, Subject to the Attached Fiscal Year Cash Flow Distribution Schedules – ACTION

Anna LaForte, Deputy Director for Policy and Programming, presented the item per the staff memorandum.

Peter Sachs asked why the bike lanes were buffered rather than barrier protected, noting that there was nothing to keep cars or Ubers from double parking in them, and asked how barrier protected lanes were prioritized. Charles Ream, Planner at the San Francisco Municipal Transportation Agency (SFMTA) replied that for Arguello Boulevard, there was a process of community walk-throughs and consultations with the San Francisco Bike Coalition and Supervisor Mar's office to evaluate different treatment options. He said that factors such as driveways and the offset street grids in the area were challenges, but that the chosen design was approved by the SFMTA and Supervisor Mar's office. Mr. Sachs said that barrier protected lanes would be ideal and asked if that was with the first option considered. Mr. Ream responded that prioritization was based on demand and cyclist injuries, and that there was often an iterative process where a less intensive treatment could be upgraded at a later.

Myla Ablog said she had read an article in the San Francisco Examiner from February 23 that said the new trolley buses struggled on San Francisco's hills. She asked whether these buses would be used on Geary Corridor Bus Rapid Transit and whether the trolley buses would cause problems in the future if they struggled on hills. Kamini Lall, Senior Financial Analyst at SFMTA, replied that the buses had completed a lot of testing and were working on the routes where the new buses were being used. She said she could follow up to get more information if desired.

Ms. Ablog asked about the environmental clearance necessary for the Burke facility renovation. Jonathan Rewers, Manager of Capital Planning and Analysis at the SFMTA, responded that the project would likely be categorically exempt because the use would not change.

Brian Larkin asked whether design of the Burke facility would be finalized by the time subcontracts were awarded. Mr. Rewers replied that it would, and that San Francisco Public Works (SFPW) had good experience using the Construction Manager/General Contractor (CM/GC) approach. He said that the overhead line crews were first responders to electric line problems and that it was important to move them to a seismically sound facility. He said that San Francisco Animal Care & Control would move into the Bryant facility in 2018 and that it was important to meet that schedule. Mr. Larkin asked what would happen if the project fell behind schedule. Mr. Rewers replied that there were three phases to the project, but that the project could be accelerated to two phases if necessary. He added that costs for the Animal Care & Control facility could go up if it was delayed. Mr. Larkin said he was concerned that the current situation would lead to a delay. Jim Bucher, Senior Architect with SFPW, said that they were conscious of wanting to have a defensible design and that with CM/GC, they could bring a prime contractor on early to provide input on the design. He said that SFPW would control the project, with the SFMTA as the client.

Chair Waddling asked what the reasoning was for restriping Arguello Boulevard now if it was going to be torn up for repaving. Ms. LaForte replied that SFPW's paving schedule was in flux

depending on utility coordination and that the SFMTA believed that the short-term improvements were worth the cost.

Chair Waddling asked why there was sales tax charged on bus procurements when there were exemptions for things like scientific equipment. Ms. LaForte said that she would follow up.

Jacqueline Sachs said that the Arguello project should take into account the congregation at the intersection of Arguello Boulevard and Lake Street. She said that current signal timing did not allow enough time for some people to cross the street. Mr. Ream replied that the paving project would install pedestrian countdown signals and would take a comprehensive look at signal timing and that all intersections would accommodate the standard pedestrian speed of 2.5 feet per second.

During public comment, John Templeton said that his church was at the intersection of Arguello Boulevard and Lake Street and that they had never been contacted regarding the project. He said that that intersection was not designed to be safe for all users.

Roland LeBrun said that 2.5 feet per second was too fast and that Caltrain assumed 1.5 feet per second. He asked how the Burke project would improve operations and efficiency, and whether the SFMTA was being paid to leave the Bryant facility. He noted that the Transbay Transit Center had used a CM/GC project delivery method.

Edward Mason asked how money was being accumulated to perform mid-life overhauls on all the new vehicles that San Francisco was buying. He also asked whether expensive mechanics or engineers were doing the warranty paperwork, as he did not see administrative staff listed in the budget.

John Larson moved to approve the item, seconded by Becky Hogue.

The item was approved by the following vote:

Ayes: CAC Members Ablog, Hogue, Larkin, Larson, Lerma, J. Sachs, Tannen and Waddling

Nays: Peter Sachs

Absent: CAC Members Morrison

7. **Major Capital Projects Update – Muni Radio Replacement Project – INFORMATION**

Luis Zurinaga, Consultant for the Transportation Authority, presented the item per the staff memorandum.

Brian Larkin asked why the cost for conceptual engineering was so high if the project was being delivered as design/build. Mr. Zurinaga replied that there was more developed conceptual engineering than was typical because it was design/build.

Santiago Lerma asked what the benefits of the project would be. Mr. Zurinaga replied that the existing systems were very old and that it was difficult to get parts to repair them. Mr. Lerma asked whether some of the vehicles slated for replacement would get upgraded radio equipment. Mr. Zurinaga said that vehicles would be prioritized based on their expected remaining service life.

Peter Sachs said he was familiar with projects in the air traffic control industry where Harris, SFMTA's contractor, seemed to strategically realize that a project required a broader scope than had been assumed, resulting in higher costs. He said he hoped this contract would not result in the same situation. Mr. Zurinaga said that it was unfortunate that Harris was the only bidder on the project, and noted that the bid was 40% above the estimate and that it took over a year to

negotiate the award.

During public comment, Roland LeBrun said that it would cost a fortune to integrate the many disparate systems SFMTA used and that it might be prudent to pause the radio project and hire a consultant to help better organize the communications systems before they were upgraded.

8. Update on the Proposed Golden State Warriors Arena – INFORMATION

Peter Albert, Urban Planning Initiatives Manager with the San Francisco Municipal Transportation Agency, and Adam Van de Water, Project Manager for the City's Office of Economic and Workforce Development, presented them item.

Maria Lombardo, Chief Deputy Director, acknowledged Mr. Albert's imminent retirement. She and Chair Waddling expressed great appreciation for his career, including his work at the Transportation Authority.

Chair Waddling asked if the Mission Bay Loop had been incorporated into the transportation management plan for the arena. Mr. Albert said that it had and that the Loop was one reason for the central platform design of the arena's light-rail station. Chair Waddling commented that San Francisco Giants games caused traffic jams in the Bayview and asked how any management plan could improve the situation once the Golden State Warriors arena was operational. Mr. Albert said the introduction of Parking Control Officers (PCOs) had improved traffic related to Giants games. He said PCOs for Warriors games would intercept vehicles before they reached the most congested areas near the arena and would divert them directly to parking facilities to reduce congestion from vehicles seeking parking places. Mr. Van de Water added that the transportation plan emphasized emergency access to the hospital and prioritized emergency vehicle corridors. He said PCOs would have the means to override signal phases for emergency vehicles and to ease gridlock. Mr. Van de Water noted that congestion would not improve as a result of the new arena, but that the goal was to manage it as well as possible. He said since Warriors games were in the evening, they would not coincide with most Giants games, and that the main issue was the overlap between evening rush hour and evening events at the arena.

Mr. Albert said the plan assumed construction of the Mission Rock parking structure, and that he had hoped to include shared use of an additional 9,000 existing parking spaces. He said ideal parking locations were located outside of the immediate vicinity of the arena. Mr. Van de Water added that the planners had looked at the development up to 40 years in the future, so the Mission Rock parking structure was incorporated in the traffic model because it was a known future development.

Jacqueline Sachs asked if construction of the arena would negatively impact access to the University of California, San Francisco's (UCSF's) Mission Bay campus, such as its shuttle. Mr. Albert responded that UCSF and the biotech companies in the area had endorsed the plan because of its parking management strategies. Chair Waddling commented that he worked near Mission Bay and said congestion had been managed well near the construction site.

During public comment, John Templeton said he had recently experienced major delays on the T-Third light-rail line as a result of Giants games. He said that he inquired with the San Francisco Planning Department as to why the environmental review process had not included input from the Hunters Point community, and was told that the California Environmental Quality Act did not require that environmental documents respond to environmental justice issues.

Roland LeBrun commented that the alignment for Caltrain's downtown extension to a rebuilt Transbay Transit Center should be designed to include a new station at 7th Street, which would

allow a bi-directional loop on the light-rail line.

Jerry Cauthen commented that most of the streets in the area of the arena were already at or near capacity and that the Environmental Impact Report should have done more to document the full impact of the arena on traffic and parking.

9. Preliminary Fiscal Year 2016/17 Annual Budget and Work Program – INFORMATION

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

Chair Waddling asked CAC members to email staff with any questions about the item, since the meeting was running long.

During public comment Ed Mason asked if the Freeway Corridor Management (FCMS) project was the same as the Metropolitan Transportation Commission's (MTC's) Managed Lane Implementation Program (MLIP), and whether the Transportation Authority was following the MTC's regional express bus system study. Maria Lombardo, Chief Deputy Director, said staff would follow up separately given the hour, but she noted FCMS was a separate but related project to MLIP.

10. Update on Plan Bay Area (PBA) 2040 – INFORMATION

Michelle Beaulieu, Transportation Planner, presented the item.

John Larson asked how all San Francisco projects received a negative score for displacement. Maria Lombardo, Chief Deputy Director, reiterated how the target had been applied in the project target assessment, which didn't make sense in that context. She noted that the target's main purpose could be viewed as a policy statement meant to keep the issue of displacement front and center in the planning conversation.

During public comment, John Templeton said that too few of these projects were aimed at helping African Americans in San Francisco, who were dependent on public transit. He said the projects should be aimed at getting African Americans to work and their kids to school, and that he would like to see mitigation proposals for displacement for all of these projects, particularly in San Francisco which had some of the worst out-migration of African Americans in the country. He added that there should be better tracking of the impacts of transit projects on African Americans.

During public comment Edward Mason asked why vehicle miles traveled reduction per capita wasn't included in the guidelines. He also asked where Caltrain's downtown extension to the Transbay Transit Center was expected to fall in the project performance assessment. Ms. Beaulieu replied that it was expected to fall in the middle.

11. Update on Transbay Transit Center Financing – INFORMATION

Maria Lombardo, Chief Deputy Director, presented the item.

During public comment Jerry Cauthen emphasized that the bridge financing mechanism was a loan and that the City would be repaid. He pointed out that Prop K funds accounted for only 2% of the total cost of the Transbay Transit Center, so City contributions had not been excessive to date.

12. Introduction of New Business – INFORMATION

Myla Ablog said that she had encountered SFMTA staff taking surveys of where passengers were tracked getting on and off the bus using an electronic system, and asked if this technology would become more widely used.

Jacqueline Sachs said regarding the late night transit study, “The Other 9 to 5,” that before any further recommendations were finalized, the CAC should have a presentation and the opportunity to add input.

Santiago Lerma said that he would like to see something done to improve the efficiency of passing through the building security when visiting the Transportation Authority’s offices.

There was no public comment.

13. Public Comment

During public comment, Jerry Cauthen said that he had traveled to the meeting on Muni light-rail and that it worked great, but was crowded. He said that in the 1990s, four and five car trains were run, but since then capacity had been cut by running shorter trains. He said that the Transportation Authority needed to look at increasing Muni Metro’s capacity.

Edward Mason said that in Noe Valley, he still saw large commuter shuttles on streets restricted to three-ton weight limits, buses without license plates or commuter shuttle program decals, and buses with Florida license plates, all of which were in violation of the commuter shuttle program. He said that signatures had been gathered opposed to lifting weight restrictions on Dolores Street, and that he had observed 50 commuter shuttles per hour at the intersection of 24th and Valencia Streets between 7 and 8 a.m.

John Templeton said that Plan Bay Area 2040 targeted Bay View Hunters Point for substantial growth, but that the people who currently lived there have limited transportation options and that the equity of transportation investments being proposed should be further considered.

14. Adjournment

The meeting was adjourned at 8:20 p.m.



DRAFT MINUTES

PLANS AND PROGRAMS COMMITTEE

Tuesday, April 19, 2016

1. Roll Call

Chair Tang called the meeting to order at 10:32 a.m. The following members were:

Present at Roll Call: Commissioners Avalos, Peskin and Tang (3)

Absent at Roll Call: Commissioners Breed (entered during Item 5) and Farrell (entered during Item 3) (2)

2. Citizens Advisory Committee Report – INFORMATION

Chris Waddling, Chair of the Citizens Advisory Committee (CAC), reported that at its March 23, 2016 meeting, the CAC considered and unanimously passed Items 6 and 7 from the agenda. He said that regarding Item 6, on the allocation request for Treasure Island, the CAC was primarily concerned with affordability for low-income residents on the island. He noted that Becky Hogue, who resides on the island, said that the Transportation Authority had been doing a great job of reaching out to residents and addressing their concerns on this issue. Regarding the allocation request for the Mansell Corridor, he said Peter Sachs had inquired about the length of time between the initial public meetings in 2010 and the upcoming construction phase. Mr. Waddling noted that he had attended the public meetings and that the Recreation and Parks Department had explained that due to the timing of funding, the project was expected to have a delay. He said that regarding Item 7, the Bay Area Bike Share Update, Peter Sachs had voiced concerns regarding the proposed expansion in that the new stations would not be adequately dispersed throughout the city, specifically in the southeast and southwest sectors of the city.

Commissioner Avalos thanked Mr. Waddling for his work on the Mansell Corridor project, and said that the pedestrian safety and traffic calming measures would be a dramatic improvement to the area.

There was no public comment.

3. Approve the Minutes of the March 15, 2016 Meeting – ACTION

There was no public comment.

The minutes were approved without objection by the following vote:

Ayes: Commissioners Avalos, Peskin and Tang (3)

Absent: Commissioners Breed and Farrell (2)

4. Recommend Appointment of One Member to the Citizens Advisory Committee – ACTION

Maria Lombardo, Chief Deputy Director, presented the item per the staff memorandum.

Commissioner Peskin thanked Wells Whitney for his service on the CAC as a representative of District 3.

Bradley Wiedmaier spoke to his interest and qualification in being appointed to the Citizens Advisory Committee (CAC).

There was no public comment.

Commissioner Peskin moved to recommend appointment of Bradley Wiedmaier to the CAC, seconded by Commissioner Avalos.

The item was approved without objection by the following vote:

Ayes: Commissioners Avalos, Farrell, Peskin and Tang (4)

Absent: Commissioner Breed (1)

5. Recommend Appointment of Two Members to the Geary Corridor Bus Rapid Transit Citizens Advisory Committee – ACTION

Maria Lombardo, Chief Deputy Director, presented the item per the staff memorandum.

Tom Barton, Sanford Kingsley, Alexander Post and Jay Seiden spoke to their interests and qualifications in being appointed to the Geary Corridor Bus Rapid Transit (BRT) Citizens Advisory Committee (GCAC).

Commissioner Avalos said that he had spoken with Commissioner Mar, who supported reappointing Margie Hom Brown to the At-Large seat, but that he was still considering candidates for the Richmond seat.

Commissioner Farrell stated that he would support the appointment of either Mr. Post or Mr. Kingsley. He said that he would defer to Commissioner Mar regarding the Richmond seat but that for the At-Large seat he tended to support applicants who appeared before the Committee.

Commissioner Breed stated that she would support Commissioner Mar's recommendation, Ms. Hom Brown, as well as support an applicant who attended and spoke at the meeting. Chair Tang asked if there was a particular applicant that the Committee would support. Commissioner Farrell stated that he would support Mr. Post for the At-Large seat, seconded by Commissioner Breed.

Chair Tang asked if there were any objections to appointing Ms. Hom Brown to the Richmond seat and Mr. Post to the At-Large seat.

Commissioner Avalos stated that he would like to keep the Richmond seat vacant until there was a recommended candidate from Commissioner Mar and reappoint Ms. Hom Brown in the At-Large seat. He said that she had been a valuable member of the GCAC and brought an important perspective to the project.

Commissioner Breed asked if the neighborhood-based seats and at-large seats had equal say on the GCAC, to which Maria Lombardo, Chief Deputy Director, confirmed that all members had an equal vote.

Commissioner Peskin noted that Ms. Hom Brown had appeared before the Committee when she was originally appointed and that she should not have to reappear to be reappointed. He said while the project touched multiple districts, it had been the practice of the Committee to defer to the district supervisor of the vacant seat.

Commissioner Farrell reiterated that he would defer to Commissioner Mar for the vacant Richmond seat but that he would be inclined to support one of the applicants who appeared at the meeting for the At-Large seat.

Commissioner Breed said she was very supportive of applicants who appeared before the Committee. She noted that Ms. Hom Brown could be appointed to either the Richmond or the At-Large seat, and that the vacant seats should be filled promptly since there were multiple qualified applicants.

Commissioner Avalos noted that Ms. Hom Brown had been an active member on the GCAC and had not missed a meeting, and suggested that both vacancies be continued to the next meeting to allow additional time to consider applicants.

There was no public comment.

Commissioner Avalos moved to continue the item, seconded by Commissioner Farrell. The item was continued at the call of the chair.

6. Recommend Allocation of \$48,000 in Prop K Funds and \$1,684,954 in Prop AA funds, with Conditions, for Four Requests, and Appropriation of \$262,000 in Prop K Funds for Two Requests, Subject to the Attached Fiscal Year Cash Flow Distribution Schedules – ACTION

Anna LaForte, Deputy Director for Policy and Programming, presented the item per the staff memorandum.

Commissioner Avalos asked if the \$163,000 allocation request for the Mansell Corridor project represented the final portion of the funding, which Ms. LaForte confirmed. Commissioner Avalos asked if the project included clearer signage for people using the bike lane towards the intersection of Persia Avenue and Dublin Street. Ms. LaForte responded that she would follow up to clarify the specific locations in question.

Commissioner Peskin noted that regarding the Chinatown Broadway allocation request, he had spoken with staff from the San Francisco Municipal Transportation Agency who confirmed that the work could start near Columbus Avenue and move west towards the intersection of Powell Street and Broadway, where there had been a recent pedestrian fatality, while design issues were sorted out.

There was no public comment.

The item was approved without objection by the following vote:

Ayes: Commissioners Avalos, Breed, Peskin and Tang (4)

Absent: Commissioner Farrell (1)

7. Bay Area Bike Share Update – INFORMATION

Emily Stapleton, General Manager at Motivate, Inc., presented the item.

Commissioner Peskin asked if there was a process for the siting of bike share stations and if so, how it involved the San Francisco Municipal Transportation Agency (SFMTA). Ms. Stapleton responded that Motivate worked very closely with the SFMTA through every phase of the process, from siting the potential service area to siting specific stations locations. She said the bike share

stations could be placed on public or private property, but that there were siting guidelines for stations placed on public property.

Commissioner Peskin said that his office had received multiple complaints regarding the bike share station located at the intersection of Grant and Columbus Avenues being moved down Grant Avenue to Chinatown, in that merchants, community organizations and residents did not receive any notice of the move. Ms. Stapleton replied that the relocation of that station was only temporary but that the community should have been notified. She said for new stations being sited, there was a very thorough outreach process to businesses and residents in the immediate vicinity of the proposed station.

Commissioner Peskin asked if there was a process for objecting or appealing station locations to the SFMTA Board. Ms. Stapleton responded that there was a process in that there were multiple public workshops to identify primary and secondary station locations based on feedback received. She said the permitting process was posted online and that community outreach was conducted throughout the entirety of the process so that if there was negative feedback regarding the primary location they could pursue the secondary location. Commissioner Peskin commented that a lot of constituents in Chinatown did not access the internet and therefore would not have access that information.

Heath Maddox, Bike Share Program Manager at the SFMTA, added that there were detailed procedures and guidelines for locating and relocating stations, and that the station at Grant and Columbus Avenues was relocated on an emergency basis in response to a paving project. He said if a station was relocated to one location for longer than 90 days then it would have to go through the full legislative process which included a public hearing, but if the relocation was under 90 days there was no legislative process, but that businesses and residents in the immediate vicinity should have been consulted. Commissioner Peskin said that the community organization Chinatown TRIP, which had worked on transportation issues in Chinatown for several decades, was not consulted.

Commissioner Avalos noted that although Motivate was not receiving city funding and therefore not subject to local hiring requirements, the city was generally hitting 30% local hiring levels and that Motivate should strive to reach that level. He added that there were several examples of the First Source Hiring Program, which Motivate would be using, not yielding that level.

Chair Tang noted that bike share stations would eventually be rolled out to all 11 supervisorial districts but asked if there was a timeline for when it would reach the outer districts, such as District 4. Ms. Stapleton responded that the bikes would be rolled out in four phases, with 25% in the first phase, 15% in the second phase, 30% in the third phase, and the final 30% in the fourth phase. She said that for District 4, permits were scheduled to be submitted in spring/fall 2017 and deployment was anticipated in spring/fall 2018.

Commissioner Avalos asked if cash payments would be an option to use bike share as a lot of people did not have access to the internet. Ms. Stapleton responded that cash payment was not currently planned but as this was a long-term program, Motivate would be working with regional partners to make the system as accessible as possible to as many people as possible. She noted that the bikes were very expensive and the program currently required users to link to an account so that if a bike were to go missing there was a way to follow up with the user. She said theoretically a capital account be created that could secure cash payments, but for the first phase of the roll out the focus was on letting people know about the discount option.

Commissioner Avalos said that having a cash option was critical to removing a barrier for many potential bike share users but that he understood that cash might not be a sufficient collateral for the bikes. He asked if Clipper Card could be used as a payment option. Ms. Stapleton said that Clipper Card was included as part of the agreement in that it had to be a payment option within 20 months of the initial deployment of bikes.

Commissioner Breed asked when bike share stations were scheduled to be deployed in Hayes Valley. Ms. Stapleton said that since Hayes Valley was adjacent to the current service area, it could be included in next process of siting that would take place this summer, and therefore the stations could be active by spring/summer 2017.

Commissioner Avalos thanked Ms. Stapleton for her work on this program and acknowledged that it would take time to develop and deploy the stations to be rolled out in each supervisorial district.

During public comment, Andrew Yip said that the intersection of Grant Avenue and Broadway would be a good location for a bike share station because the area had a lot of tourists and that Grant Avenue was a good street for a bike lane.

David Lee commented that if the city did not stop depending on oil it was going have problems and that creating more Muni tunnels under the city was creating structural problems.

8. Update on the District 3 Neighborhood Transportation Improvement Program – INFORMATION

Greg Riessen, Transportation Engineer at the San Francisco Municipal Transportation Agency (SFMTA), presented the item.

Commissioner Peskin asked whether there were any updates regarding further upgrades to the existing signal timing “scramble” system at the intersection of Kearny and Clay Streets.

Mr. Riessen explained that to speed implementation, the scramble was put in place without the diagonally-oriented pedestrian signal heads that would typically accompany a scramble system. He said that implementing diagonal signal heads was time consuming and costly due to the age of the signal infrastructure and the presence of sub-floor basements. Mr. Riessen said that the SFMTA had included the intersection of Kearny and Clay Streets in its capital improvement program so that it could receive a full upgrade within the next few years.

There was no public comment.

9. Update on the San Francisco Municipal Transportation Agency’s Muni Equity Strategy – INFORMATION

Julie Kirschbaum, Operations Planning and Scheduling Manager at the San Francisco Municipal Transportation Agency (SFMTA), presented the item.

Commissioner Avalos commented that the Equity Strategy was many years in the making since his office had first launched it as a charter amendment. He recognized the SFMTA for taking a dynamic approach and working closely with community stakeholders, and noted the amount of participation by community groups who represented low-income individuals. He added that it was important to emphasize public input in the process, and not only transit advocates but every day Muni riders who were essential to meeting the strategy’s objectives.

Chair Tang acknowledged the work of SFMTA and the leadership of Commission Avalos on this strategy. She said that a lot of Muni routes traveled through multiple districts and could originate or pass through different communities of concern, and asked what metrics were used to determine what service improvements would be made. Ms. Kirschbaum responded that the strategy took a neighborhood-based approach because some routes that were critical to low-income neighborhoods didn't show up in the Title VI analysis. She cited the 22-Fillmore line as an example of a route serving mixed demographics, as it was critical for the Western Addition and Mission neighborhoods but also well-utilized in the Marina and Pacific Heights neighborhoods. She said the benefit of the neighborhood-based approach was that by shoring up how a route was performing in certain neighborhoods, it would improve service across the entire route. Ms. Kirschbaum said that the task force also promoted the neighborhood-based approach due to the differences in neighborhoods. She said while overcrowding and reliability were the biggest issues in Chinatown, for the Bayview the biggest issue was travel time, and that this approach would allow for a tailored strategy for each neighborhood. She added that travel time was not looked at in terms of speed but rather how travel times compared by transit and by car from central locations throughout a neighborhood, such as a hospital, school or park. She said that for each neighborhood they looked at how much of the city could be accessed within a reasonable amount of time.

Chair Tang asked if the strategy also looked at numbers of transfers, as some commutes might take two to three transfers to get to well-utilized destinations. Ms. Kirschbaum responded that the number of transfers was built into the analysis because transfer times were included as part of the overall travel time.

Commissioner Breed thanked the SFMTA for trying to better understand the challenges faced by members of the community who relied on Muni. She said that she had attended some of the community meetings but also gathered feedback from people who were unable to participate. She noted that gathering information from people with significant work, school or family commitments was a challenge, but that they should also have a say in the process. Commissioner Breed said that there were better ways to solicit feedback beyond community meetings, and suggested that surveys be distributed to people with time limitations at their school or workplace. She said there were many people who relied solely on public transit and did not have the ability to take taxis or ride-sharing services, and that they would provide valuable input into the challenges of the system. Ms. Kirschbaum responded that once the next round of community outreach was underway, it would incorporate new ways of gathering feedback that would be convenient for customers, whether that be conducting surveys on the bus, doing an intercept survey, or surveys through community-based providers. She said the outreach would have to be creative because this project did not fit the typical community workshop approach.

Commissioner Breed said that outreach at schools would be effective, and in particular high schools, because the SFMTA could utilize student data and reach out to students who participate in the free or reduced-lunch program. She said the outreach needed to be creative in order to receive diverse opinions because it was hard to quantify the unique challenges faced by people in different neighborhoods.

Chair Tang said that in the West Side and Sunset neighborhoods, there were high populations of seniors, many of whom were from low-income families, which were not considered communities of concern but relied heavily on transit. She said that while projects in the Muni Forward program would help support these populations, she asked if the Equity Strategy also looked at factors such

as age. Ms. Kirschbaum responded that the strategy did incorporate age and that it was part of the neighborhood-based approach, which sought to understand the equity needs of seniors and people with disabilities. She said the fact that since many seniors and people with disabilities used discount passes, they were able to identify which routes were most heavily used by these populations. She said this resulted in additional recommendations and analysis for those routes, which would continue to be evaluated on an annual basis to incorporate shifts in demographics.

Chair Tang said that goals could sometimes compete with each other, such as providing faster and more reliable service to certain neighborhoods while removing stops in other neighborhoods, and asked for follow up on how those differences in goals were reconciled. She then asked how the SFMTA determined how the performance of a route in a community of concern compared to how the overall route performed. Ms. Kirschbaum responded that for data like on-time performance, there were GPS monitors located on buses that signaled the location of the bus every half mile or so. She said the SFMTA collected millions of samples of this data per day which allowed them to look at how a route was performing in particular neighborhoods compared to the entire route, as well as compared to the overall category of the route in terms of similar ridership levels and other characteristics.

There was no public comment.

10. Introduction of New Items – INFORMATION

Commissioner Avalos requested a presentation on the San Francisco Municipal Transportation Agency's bike program, including an overview of the next generation of bike projects and how the bike network would interface with Bay Area Bike Share.

There was no public comment.

11. Public Comment

During public comment, Andrew Yip spoke regarding principles and virtues.

12. Adjournment

The meeting was adjourned at 12:02 p.m.




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Memorandum

Date: 05.12.16 **RE:** Plans and Programs Committee
May 17, 2016

To: Plans and Programs Committee: Commissioners Tang (Chair), Farrell (Vice Chair), Avalos, Breed, Peskin and Weiner (Ex Officio)

From: Eric Cordoba – Deputy Director for Capital Projects 

Through: Tilly Chang – Executive Director 

Subject: **ACTION** – Recommend Appointment of Two Members to the Geary Corridor Bus Rapid Transit Citizens Advisory Committee

Summary

The Transportation Authority has a 13-member Geary Corridor Bus Rapid Transit (BRT) Citizens Advisory Committee (GCAC). There are two vacancies on the GCAC for a representative of the Richmond area and a representative of at-large interests. The vacancies are due to the term expirations of Margie Hom Brown and Jonathan Foerster, who are both not seeking reappointment. After issuing notices seeking applicants to the GCAC over the past year, we have received applications from 35 candidates. Staff provides information on applicants but does not make recommendations on GCAC appointments. Attachment 1 contains a summary table with information about current and prospective GCAC members, showing neighborhood of residence, neighborhood of employment, affiliation, and other information provided by the applicants.

BACKGROUND

Geary Corridor Bus Rapid Transit (BRT) is one of the signature projects included in the Prop K Expenditure Plan. The Transportation Authority is currently leading environmental analysis for Geary Corridor BRT, in partnership with the San Francisco Municipal Transportation Agency (SFMTA). The environmental analysis will identify the benefits and impacts of BRT alternatives, a preferred alternative, and strategies to mitigate any environmental impacts. Engineering work for this phase entails preparation of designs for project alternatives as needed to clarify potential impacts and support identification of a preferred alternative, as well as development of design solutions for complex sections of the corridor. Due to the detailed nature and significance of the study, the Geary Corridor BRT Citizens Advisory Committee (GCAC) is distinct from the Transportation Authority Citizens Advisory Committee (CAC).

Role of the GCAC: The role of the GCAC is to advise Transportation Authority staff throughout the environmental analysis of the Geary BRT project by providing input representative of varying interests along the corridor, as well as broader, citywide interests related to the project. The GCAC currently meets approximately bi-monthly. Specifically, the GCAC members have and will continue to:

- Advise on the study scoping to identify the alternatives for analysis;
- Advise on the selection of a preferred alternative based on project benefits and expected environmental impacts;

- Advise on strategies to mitigate any negative environmental impacts; and
- Advise on strategies for effective outreach and assist with outreach to neighborhoods and other stakeholders.

In February 2008, through Resolution 08-56, the Transportation Authority Board established the structure for the GCAC. In October 2013, the Board increased the number of seats on the GCAC from eleven to thirteen. Appointed individuals are to reflect a balance of interests, including residents, businesses, transportation system users, and advocates. Each member is appointed to serve for a two-year term.

DISCUSSION

The purpose of this memorandum is to present the applications received for the GCAC and to seek a recommendation to appoint two members to the GCAC for two-year terms. The vacant seats on the GCAC are for a representative of the Richmond area and a representative of at-large interests. The vacancies are due to the term expirations of Margie Hom Brown and Jonathan Foerster, who are both not seeking reappointment. The current GCAC membership and structure are shown in the table below:

Geographic Representation	Seats on GCAC	Term Expires	Member(s)
Richmond	3	Apr 2016 Feb 2017 Sep 2017	J. Foerster (expiring term) A.P. Miller J. Fong
Japantown/Fillmore	3	Sep 2017 Jan 2018 Jan 2018	B. Horne R. Hashimoto W. Newsom
Tenderloin/Downtown	2	Jul 2017 Sep 2017	K. Stull P. Gallotta
At-Large	5	Apr 2016 Dec 2016 Sep 2017 Sep 2017 Oct 2017	M. H. Brown (expiring term) W. Parsons C. Bakir J. John P. Chan

Recruitment: We solicited GCAC applications in March 2016 through the Transportation Authority's website and social media accounts, Commissioners' offices, and an email blast to community members and organizations with interest in the Geary corridor. Applications are also accepted on a rolling basis on the Transportation Authority's website.

Applicant Pool: We have received applications from 35 candidates, including the one member seeking reappointment. Attachment 1 provides a matrix summarizing the applications, including information about each person's affiliation to and interest in the Geary Corridor BRT project. Applicants were informed of the opportunity to speak on behalf of their candidacies at the May 2016 Plans and Programs Committee meeting. Applicants were advised that appearance before the Committee is strongly encouraged, but not required, for appointment. Staff provides information on applicants but does not

make recommendations on these appointments.

ALTERNATIVES

1. Recommend appointment of two members to the GCAC.
2. Recommend appointment of one member to the GCAC.
3. Defer action, pending additional information or further staff analysis.

CAC POSITION

None. The CAC does not make recommendations on other CACs or appointments to those committees.

FINANCIAL IMPACTS

None.

RECOMMENDATION

Recommend appointment of two members to the GCAC.

Attachments (2):

1. Geary BRT CAC Members
2. Geary BRT CAC Applicants for Richmond and At-Large Seats

Enclosure:

1. Geary BRT CAC Applications for Richmond and At-Large Seats

Attachment 1. Geary BRT Citizens Advisory Committee Members, May 2016

Term Expiration	Name	Corridor Relationship / Interest / Affiliation				Residence		Work		Self-Identified:					
		Resident	Business	Employee	Transit	Environment	Disabled	Senior	Other	District	Neighborhood	District	Neighborhood	Gender	Ethnicity
Richmond (3 seats, 1 vacancy)															
Apr. 2016	Jonathan Foerster	x			x					1	Richmond			M	n/a
Feb. 2017	Angela Paige Miller	x	x		x	x		Pedestrian, bicycling advocate	1	Inner Richmond		Stanford	F	Caucasian	
Sep. 2017	Joanna Fong	x			x				1	Richmond			F	Chinese	
Japantown/Fillmore (3 seats)															
Sep. 2017	Benjamin Horne	x	x		x				5	Lower Pac Heights/Upper Fillmore	3	Union Square/Lower Pac Heights	M	n/a	
Jan. 2018	Richard Hashimoto	x	x		x	x		Pedestrian advocate	n/a	Vallejo, CA (part-time in W. Addition)	5	Western Addition	M	Asian	
Jan. 2018	William Newsom	x	x		x			Bicycling advocate	5	Western Addition	3	Financial District	M	n/a	
Tenderloin/Downtown (2 seats)															
Jul. 2017	Kevin Stull	x			x	x		Central City SRO Collaborative; Pedestrian Safety Advisory Committee	6	Tenderloin	6	Tenderloin	M	Caucasian	
Sep. 2017	Peter Gallotta	x			x			LGBT	6	Tenderloin	6	Civic Center	M	n/a	
At-Large (5 seats, 1 vacancy)															
Apr. 2016	Margie Hom Brown	x			x			Chinese speakers	1	Richmond			F	Chinese	
Dec. 2016	Winston Parsons	x			x	x		Pedestrian and bicycle advocate	2	Inner Richmond/Jordan Park	6	SOMA	M	n/a	
Sep. 2017	Jolsna M John	x			x			Pedestrian advocate	2	Lower Pac Heights			F	South Asian	

Term Expiration	Name	Corridor Relationship / Interest / Affiliation										Residence		Work		Self-Identified:					
		Resident	Business	Employee	Transit	Environment	Disabled	Senior	Other	District	Neighborhood	District	Neighborhood	District	Neighborhood	Gender	Ethnicity				
Sep. 2017	Cyndi Bakir	x		x	x	x						x	Pedestrian and bicycling advocate	1	Inner Richmond	1	Richmond	1	Richmond	F	Euro-American
Oct. 2017	Paul Chan	x	x		x									1	Richmond	1	Richmond	1	Richmond	M	n/a

Note: Dark shading denotes members with current term expirations.

Attachment 2. Geary BRT Citizens Advisory Committee Applicants, May 2016

Applicant Status	Name	Corridor Relationship / Interest / Affiliation						Residence		Work		Self-Identified:			
		Resident	Business	Employee	Transit	Environment	Disabled	Senior	Other	District	Neighborhood	District	Neighborhood	Gender	Ethnicity
Richmond (3 seats, 1 vacancy)															
Applicant*	Matthew Alvarez	x			x		x			1	Inner Richmond	3	Financial District	M	Latino
Applicant	Tom Barton	x			x			x		1	Richmond			M	
Applicant*	Nelson Bonilla	x		x						1	Inner Richmond	6	SOMA	M	Latino
Applicant*	Asher Butnik	x		x	x			Pedestrian advocate		1	Richmond	1	Richmond		
Applicant*	Jamie Choy	x			x			Pedestrian advocate	2	Sea Cliff / Outer Richmond			Oakland	M	Chinese-Caucasian
Applicant*	Sascha Cohen	x	x		x			Bicycling and pedestrian advocate	1	Inner Richmond	5		Inner Sunset		
Applicant*	Gilbert Dair	x					x		1	Richmond	9		Mission		
Applicant*	Peter Geiler	x			x		x		1	Richmond				M	
Applicant*	Emily Grimm	x	x	x	x	x		Pedestrian advocate	1	Outer Richmond	6		Financial District	F	Caucasian
Applicant*	Rene Hinojosa	x	x						1	Richmond	3		Financial District	M	Latino
Applicant*	Neal Johnson	x	x		x			Pedestrian advocate	1	Richmond	1		Richmond	M	Caucasian
Applicant	Jason Jungreis	x			x	x			1	Outer Richmond	3		Financial District	M	Caucasian
Applicant*	Patrick Kennedy	x	x		x				1	Inner Richmond	3		Russian Hill	M	Caucasian
Applicant	Sanford Kingsley	x	x		x				2	Richmond	1		Richmond	M	Caucasian
Applicant*	Brian Larkin	x	x		x		x		1	Outer Richmond	1		Outer Richmond	M	
Applicant	Kate Lazarus	x	x	x	x				1	Richmond	3		Jackson Square	F	Caucasian
Applicant*	David Lee	x	x		x		x		1	Richmond	1		Richmond	M	Chinese

Applicant Status	Name	Corridor Relationship / Interest / Affiliation							Residence			Work			Self-Identified:		
		Resident	Business	Employee	Transit	Environment	Disabled	Senior	Other	District	Neighborhood	District	Neighborhood	District	Neighborhood	Gender	Ethnicity
Applicant*	Thomas Ma	x			x			x		1	Outer Richmond	6	Downtown	6	M	Chinese	
Applicant*	Dylan MacDonald	x				x				1	Inner Richmond	6	SOMA				
Applicant*	Suzie Moy	x	x			x		x		1	Richmond				F	Asian	
Applicant*	Bozhena Palatnik	x			x			Pedestrian advocate		1	Outer Richmond		Belmont, CA		F		
Applicant	Jay Seiden	x			x					1	Richmond	3	Downtown	3	M		
Applicant*	Daniel Sisson	x	x		x			SF Transit Riders Union		1	Inner Richmond	3	Financial District	3	M		
Applicant*	Victoria Stephens	x			x		x			1	Lower Richmond				F	Caucasian	
Applicant*	Ventsislav Stoichev	x			x					1	Central Richmond	3	Financial District	3			
Applicant*	Joe Strella	x			x			Pedestrian advocate		1	Inner Richmond		San Bruno		M		
Applicant*	Alexei Nikolaeff-Svensson	x	x		x			Bicycling advocate		1	Inner Richmond	1	Inner Richmond	1			
Applicant*	Mark Valentine	x	x		x			Pedestrian advocate		1	Richmond	1	Richmond	1			
Applicant*	Kevin Watkins	x	x		x			Bicycling advocate		1	Inner Richmond		SOMA		M	Caucasian	
Applicant*	Oleg Zhoglo	x	x		x					1	Outer Richmond	6	SOMA	6	M		
Japantown/Fillmore (3 seats, 0 vacancies)																	
Applicant*	Lotus Yee Fong	x	x		x		x	Pedestrian advocate		5	Western Addition				F	Asian	
Tenderloin/Downtown (2 seats, 0 vacancies)																	
No applicants.																	
At-Large (5 seats, 1 vacancy)																	
Applicant	Ceci de la Montanya	x	x		x					2	Jordan Park	2			F		
Applicant	Alexander Post	x			x					2	Presidio / Laurel Heights						

Applicant Status	Name	Corridor Relationship / Interest / Affiliation							Residence			Work		Self-Identified:		
		Resident	Business	Employee	Transit	Environment	Disabled	Senior	Other	District	Neighborhood	District	Neighborhood	District	Gender	Ethnicity
Applicant*	Elliott Talbot			x	x					2	Marina	3	Financial District			
Applicant*	Jeffrey Wood	x	x			x				8	Noe Valley	8	Noe Valley	M		

Note: Applicants eligible for neighborhood-based seats listed above are also eligible for At-Large seats.

***Applicant has not appeared before the Plans and Programs Committee. This is not a requirement but is encouraged.**



Memorandum

Date: 05.12.16 **RE:** Plans and Programs Committee
May 17, 2016

To: Plans and Programs Committee: Commissioners Tang (Chair), Farrell (Vice Chair), Avalos, Breed, Peskin and Wiener (Ex Officio)

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

Through: Tilly Chang – Executive Director *all*

Subject: **ACTION** – Recommend Allocation of \$9,599,451 in Prop K Funds, with Conditions, for Three Requests, Subject to the Attached Fiscal Year Cash Flow Distribution Schedules

Summary

As summarized in Attachments 1 and 2, we have three requests totaling \$9,599,451 in Prop K funds to present to the Plans and Programs Committee. The San Francisco Municipal Transportation Agency (SFMTA) is requesting \$5 million in Prop K funds and a commitment to allocate another \$6.6 million to leverage Federal Transit Administration funds for the procurement of 33 60-foot New Flyer electric trolley coaches. The committed funds would be available for allocation once the SFMTA secures the remaining federal funds for the project. The SFMTA has also requested \$4,400,000 in Prop K funds for planning and design work to renovate its Burke Avenue industrial building to increase the efficiency of the central warehouse for its Materials Management section and to provide a new headquarters for its Overhead Lines group. Finally, the SFMTA has requested \$199,451 in Prop K Neighborhood Transportation Improvement Program (NTIP) capital funds for bicycle and pedestrian safety improvements on Arguello Boulevard, including bike lane striping, continental crosswalks and design of sidewalk bulbouts to be constructed through the paving project in 2017.

BACKGROUND

We have received three requests for a total of \$9,599,451 in Prop K funds to present to the Plans and Programs Committee at its May 17, 2016 meeting, for potential Board approval on May 24, 2016. As shown in Attachment 1, the requests come from the following Prop K categories:

- New and Renovated Vehicles – Muni
- Rehab/Upgrades Existing Facilities – Muni
- Bicycle Circulation/Safety
- Pedestrian Circulation/Safety

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

DISCUSSION

The purpose of this memorandum is to present three Prop K requests totaling \$9,599,451 to the Plans and Programs Committee and to seek a recommendation to allocate the funds as requested. Attachment 1 summarizes the three requests, including information on proposed leveraging (i.e. stretching Prop K 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 are included in the attached Allocation Request Forms.

Staff Recommendation: Attachment 3 summarizes the staff recommendations for the requests, highlighting special conditions and other items of interest.

Transportation Authority staff and project sponsors will attend the Plans and Programs Committee meeting to provide brief presentations on some of the specific requests and to respond to any questions that the Plans and Programs Committee may have.

ALTERNATIVES

1. Recommend allocation of \$9,599,451 in Prop K funds, with conditions, for three requests, subject to the attached Fiscal Year Cash Flow Distribution Schedules, as requested.
2. Recommend allocation of \$9,599,451 in Prop K funds, with conditions, for three requests, subject to the attached Fiscal Year Cash Flow Distribution Schedules, with modifications.
3. Defer action, pending additional information or further staff analysis.

CAC POSITION

The CAC was briefed on this item at its April 27, 2016 meeting and adopted a motion of support for the staff recommendation. Subsequent to that meeting, the SFMTA completed final contract negotiations with New Flyer of America, reducing the total cost for procurement of 33 trolleys by \$1.9 million and reducing the needed Prop K match by \$386,000. Transportation Authority staff has therefore reduced its recommended future commitment to allocate from \$7,023,785 to \$6,637,580.

FINANCIAL IMPACTS

This action would allocate \$9,599,451 in Fiscal Year (FY) 2015/16 Prop K sales tax funds, with conditions, for three requests. The allocations would be subject to the Fiscal Year Cash Flow Distribution Schedules contained in the attached Allocation Request Forms.

Attachment 4, Prop K Allocation Summaries – FY 2015/16, shows the total approved FY 2015/16 Prop K allocations and appropriations to date, 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 recommendation actions. Furthermore, sufficient funds will be included in future budgets to cover the recommended cash flow distribution for those respective fiscal years.

RECOMMENDATION

Recommend allocation of \$9,599,451 in Prop K funds, with conditions, for three requests, 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 Allocation Summaries – FY 2015/16
5. Prop K/Prop 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)	Leveraging		Phase(s) Requested	District	
							Expected Leveraging by EP Line ³	Actual Leveraging by Project Phase(s) ⁴			
Prop K	17M	SFMTA	Replace 14 60-Foot Trolley Coaches	\$ 5,000,000	\$ -	\$ 25,000,000	84%	80%	Procurement	Citywide	
Prop K	20M	SFMTA	Burke Facility Renovation	\$ 4,400,000		\$ 4,550,000	90%	3%	Planning, Design	10	
Prop K	39, 40	SFMTA	Arguello Boulevard Near-term Improvements [NTIP Capital]	\$ 199,451	\$ -	\$ 199,451	NA	0%	Design, Construction	1	
TOTAL							\$ 9,599,451	\$ -	\$ 29,749,451	84%	68%

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 Acronym: 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 or non-Prop AA 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 Descriptions¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Requested	Prop AA Funds Requested	Project Description
17M	SFMTA	Replace 14 60-Foot Trolley Coaches	\$ 5,000,000	\$ -	<p>The SFMTA is requesting allocation of \$5 million and a commitment to allocate \$6.6 million in Prop K funds to match \$46.6 million in federal funds for procurement of 33 60-foot articulated trolley coaches from New Flyer Inc. This allocation would help fund the procurement of 14 of the 33 buses and would match federal funds currently available to SFMTA. The SFMTA will request the remaining Prop K funds and issue a second Notice to Proceed for the last 19 buses after the Metropolitan Transportation Commission programs sufficient FY16/17 federal funds to the project (expected fall 2016). The new coaches will replace 60-foot trolley coaches that have reached the end of their useful lives. The subject procurement is the second tranche in the planned purchase of up to 333 trolley coaches from New Flyer. The first vehicle that is funded by the subject request should be delivered June 2017 and all vehicles to be in service by October 2017.</p>

Attachment 2: Brief Project Descriptions¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Requested	Prop AA Funds Requested	Project Description
20M	SFMTA	Burke Facility Renovation	\$ 4,400,000	\$ -	Funds will be used for the planning and design phases for the SFMTA's \$30 million project to renovate 1570-1580 Burke Avenue. This facility currently functions as the central warehouse for SFMTA's Materials Management section, which distributes parts and supplies to all vehicle maintenance facilities throughout the city. The renovation will make more efficient use of the building, with about half of the space being remodeled to improve the capacity of the central warehouse through improved shelving systems and inventory management systems, and half of the space being remodeled as the new headquarters of SFMTA's Overhead Lines division. The project schedule is highly compressed, with completion of design scheduled for December 2016 and project completion by May 2018, when the Overhead Lines division must vacate 1401 Bryant Street to allow the building to be renovated for the new Animal Care and Control facility. The project will be delivered through a Construction Manager/General Contractor (CMGC) delivery method.
39, 40	SFMTA	Arguello Boulevard Near-term Improvements [NTIP Capital]	\$ 199,451	\$ -	Funds would be used for construction of bicycle and pedestrian safety improvements on Arguello Boulevard between Fulton Street and West Pacific Avenue. Improvements for this Bicycle High Injury Corridor were developed through a Neighborhood Transportation Improvement Program (NTIP) planning grant to improve safety and access to Golden Gate Park. The paint-only treatments include striping a 2-ft. buffer alongside the existing bike lanes, and continental crosswalks and daylighting at intersections to improve pedestrian visibility. This request would also fund the design phase for concrete bulbouts to be constructed through the SFPW's paving project in 2017. Near-term paint improvements will be constructed by August 2016.
TOTAL			\$ 9,599,451	\$ -	

¹ See Attachment 1 for footnotes.

Attachment 3: Staff Recommendations¹

EP Line No./ Category	Project Sponsor	Project Name	Prop K Funds Recommended	Prop AA Funds Recommended	Recommendation
17M	SFMTA	Replace 14 60-Foot Trolley Coaches	\$ 5,000,000	\$ -	Our recommendation includes a commitment to allocate about \$6.6 million in Prop K funds to match \$26.6 million in FY16/17 Federal Transit Administration funds anticipated to be programmed by MTC in fall 2016. 5-Year Prioritization Program (5YPP) Amendment: The recommended allocation is contingent on an amendment to the Vehicles 5YPP to reprogram \$5,000,000 in FY15/16 funds from Replace 100 ETI 40' Trolley Coaches to the subject project. See attached 5YPP amendment for details.
20M	SFMTA	Burke Facility Renovation	\$ 4,400,000	\$ -	Multi-phase allocation is recommended given the overlapping schedules of the two phases and the compressed schedule of the project as a whole. Due to the highly compressed project schedule and uncertain site conditions, our recommendation places \$2,335,000 in contingency and final design funds on reserve pending receipt of updated scope, schedule and budget upon completion of 35% design. 5YPP Amendment: The recommended allocation is contingent upon amendment of the Facilities-Muni 5YPP to reprogram FY14/15 funds from the Implementation of Various Facility Plans Placeholder and cumulative remaining programming capacity to the subject project. See attached 5YPP amendment for details.
39, 40	SFMTA	Arguello Boulevard Near-term Improvements [NTIP Capital]	\$ 199,451	\$ -	Multi-phase allocation is recommended as the work represents two distinct scopes of work with independent utility (e.g. design of concrete bulbs and construction of near-term striping work). Our recommendation includes a commitment to allocate \$78,696 in Prop K funds for pedestrian and bicycle paint improvements that will be constructed through the SFPW's Arguello paving project in 2017. These improvements include green bike boxes and green bike lane treatments, and khaki pedestrian safety zones. The paving project will pay for restriping all the near-term paint work to be funded by this request.
TOTAL			\$ 9,599,451	\$ -	

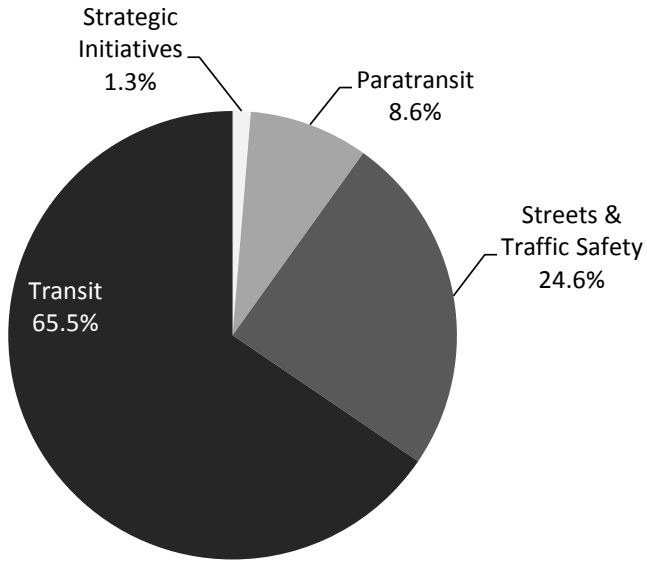
¹ See Attachment 1 for footnotes.

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

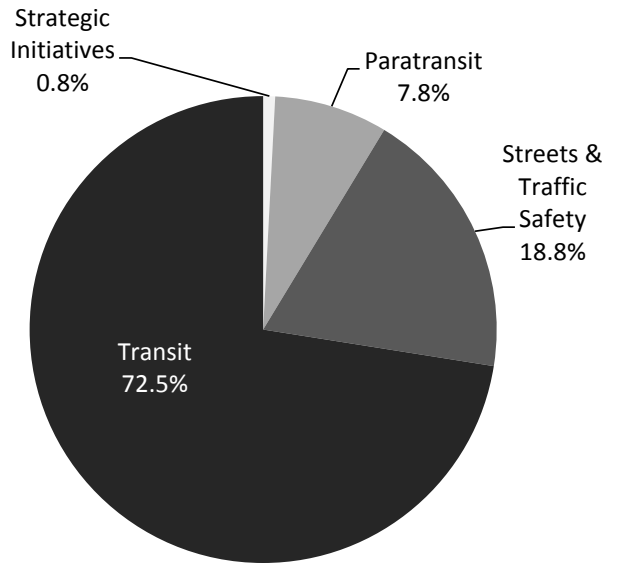
PROP K SALES TAX						
		CASH FLOW				
	Total	FY 2015/16	FY 2016/17	FY 2017/18	FY 2018/19	2019/20
Prior Allocations	\$ 189,376,527	\$ 91,177,712	\$ 83,708,529	\$ 14,026,822	\$ 333,487	\$ 32,495
Current Request(s)	\$ 9,599,451	\$ 500,000	\$ 9,099,451	\$ -	\$ -	\$ -
New Total Allocations	\$ 198,975,978	\$ 91,677,712	\$ 92,807,980	\$ 14,026,822	\$ 333,487	\$ 32,495

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



Attachment 5
Prop K Grouped Allocation Requests
May 2016 Board Action

Table of Contents

No.	Fund Source	Project Sponsor ¹	Expenditure Plan Line Item/ Category Description	Project Name	Phase	Funds Requested
1	Prop K	SFMTA	Vehicles - SFMTA	Replace 14 60-Foot Trolley Coaches	Procurement	\$ 5,000,000
2	Prop K	SFMTA	Facilities - Muni	Burke Facility Renovation	Planning, Design	\$ 4,400,000
3	Prop K	SFMTA	Bicycle Circulation/ Safety, Pedestrian Circulation/ Safety	Arguello Boulevard Near-term Improvements [NTIP Capital]	Design, Construction	\$ 199,451
Total Requested						\$ 9,599,451

1

Acronym: SFMTA (San Francisco Municipal Transportation Agency)



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**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.

The San Francisco Municipal Transportation Agency (SFMTA) requests \$5 million in Prop K funds and a commitment to allocate \$6,637,580 for procurement of a total of 33 60-foot articulated New Flyer electric trolley coaches to replace 33 Electric Transit Inc. (ETI) 60-foot trolley coaches that have reached the end of their useful lives.

Please see details on the following pages.

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

Background

The SFMTA currently has a fleet of 93 60-ft articulated trolley coaches consisting of 60 New Flyer trolleys that were placed into service in 1993 - 1994 and 33 ETI Trolleys that were placed into service in 2003. The useful life of trolley coaches per FTA Circular C5010.1D is 15 years. Therefore, the New Flyer Trolley coaches are soon to meet or have already exceeded their useful life and are overdue for replacement. The SFMTA has entered into a joint procurement contract with King County Metro in Seattle (the second largest trolley coach operator in the United States). Through options to the multi-year contract the SFMTA plans to purchase up to 220 40-foot and 105 60-foot trolley coaches. A contract (CPT 632) for an initial purchase of 60 articulated trolley coaches from New Flyer Inc. was signed on February 26, 2014, partially funded by a \$20,831,776 Prop K allocation. Deliveries have begun for those 60 trolleys, which will replace the older 60-foot New Flyer trolley coaches.

Performance of the 33 ETI 60-ft articulated trolley coaches has been declining due to mechanical or electrical system failures and maintenance costs have been increasing exponentially as the fleet has reached the end of its service lifespan. Therefore, SFMTA has made an economical decision to retire these ETI 60-ft articulated coaches now.

To replace these vehicles, the SFMTA proposes to amend the joint procurement contract with King County Metro to purchase an additional 33 articulated trolley coaches from New Flyer Inc. This Contract Amendment No.1 includes related tools, training and spare parts, for a total amount not to exceed approximately \$55.5 million, and for a term not to exceed six years.

CPT 632

Contract Option	Date of Notice to Proceed	# Vehicles to be Procured	Vehicles to be Replaced	Placed in Service
Base Contract	Feb-2014	60	Replacement for 60 New Flyer 60-foot trolley coaches	1993-94
Contract Amendment #1			Replacement for 33 ETI 60-foot trolley coaches	2003
NTP 1	Jun-2016	14		
NTP 2	Jan-2017 *	19		
Future Contract Amendment	TBD	240	Replacement for 240 ETI 40-foot trolley coaches	2001-2003
TOTAL		333		

* or following approval of FY17 funds in the Transportation Improvement Program

Scope of Subject Request

The requested funds will provide the local match for \$20 million in Federal Transit Administration (FTA) funds that the SFMTA has secured to fund the \$25 million cost for replacing 14 of the 33 ETI 60-foot trolley coaches. The SFMTA expects to secure an additional \$26.6 million in FTA funds to procure the remaining coaches when the Metropolitan Transportation Commission (MTC) programs FY 2016/17 FTA funds through its Transit Capital Priorities process in Fall 2016. The SFMTA will request a Prop K match when it has secured the additional FTA funds. Note that the full cost includes SFMTA staff labor, consultant costs and other non-contract costs. See major line item budget for more cost information.

The Replace 14 60-Foot Trolley Coaches project will ensure that there are enough vehicles available to transport passengers throughout the City. A portion of the replacement trolley coaches will be used for the bus rapid transit (BRT) service being planned on the Van Ness corridor. The Van Ness BRT project will allow a faster mode of transportation through one of the busiest corridors in the city. The replacement trolley coaches are anticipated to have a useful life of 15 years. This project is included in the Muni Vehicles Prop K 5-Year Prioritization Program (5YPPs) and the 2014 SFMTA Transit Fleet Management Plan.

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

FY 2015/16

Project Name: Replace 14 60-Foot Trolley Coaches

Implementing Agency: San Francisco Municipal Transportation Agency

ENVIRONMENTAL CLEARANCE

Type : Categorically Exempt

Status: Completed

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)	3	2012/13	2	2014/15
Prepare Bid Documents				
Advertise Construction				
Start Construction (e.g., Award Contract)	4	2015/16		
Procurement (e.g. rolling stock)	3	2016/17	2	2017/18
Project Completion (i.e., Open for Use)			1	2019/20
Project Closeout (i.e., final expenses incurred)			4	2024/25

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.

The first vehicle is anticipated to be delivered by June 2017 and all vehicles are anticipated to be delivered by October 2017.

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

FY 2015/16

Project Name: Replace 14 60-Foot Trolley Coaches

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				
Environmental Studies (PA&ED)				
Design Engineering (PS&E)				
R/W Activities/Acquisition				
Construction				
Procurement (e.g. rolling stock)	Yes	\$ 25,000,000	\$ 5,000,000	
		\$ 25,000,000	\$ 5,000,000	\$ -

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)		
R/W Activities/Acquisition		
Construction		
Procurement (e.g. rolling stock)	\$ 58,187,900	From contract and engineer's estimate
Total:	\$ 58,187,900	

% Complete of Design: 90 as of 3/30/16

Expected Useful Life: 15 Years

Includes the total cost of Contract Amendment No 1 to the New Flyer contract (33 60-foot trolley coaches).

**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.

Budget for CPT632 Contract Amendment No. 1

SUMMARY

PROCUREMENT	Provide by	Amount	% of Contract	Labor Detail
Vehicle (33 60-ft electric trolley buses)	Vendor	\$48,985,133	88.3%	
Tools, Training, & Manuals	Vendor	\$2,128,232	3.8%	
Sale Tax (8.75%)		\$4,384,920	7.9%	
Total contract		55,498,285		
Consultant Support	Consultant	299,960	0.5%	
Engineering & Project Management	SFMTA	640,011	1.2%	I
Maintenance Support	SFMTA	1,113,043	2.0%	II
Operations Support	SFMTA	55,808	0.1%	III
Warranty Support	SFMTA	554,143	1.0%	IV
Other Direct Cost (Travel & Per Diem)	SFMTA	26,400	0.0%	
City Attorney Review Fees 2 hrs x \$250/hr.	CAO	250	0.0%	
Total Amendment No. 1:		58,187,900		

BUDGET DETAILS

Procurement Phase for Contract Amendment No. 1 (33 60-ft.)

I. Engineering & Project Management	No. of FTEs	Total No. of Hours	Fully Burdened Cost/Hour	Total Cost
Program Manager (5211)	1	330	254	\$83,969
Resident Engineer (5241)	1	660	222	\$146,375
Lead Engineer (5207)	1	660	194	\$127,723
Fleet Engineer (5203)	1	660	169	\$111,481
Administrative Support (1824)	1	330	195	\$64,433
Administrative Support (1822)	1	330	149	\$49,012
Administrative Support (1820)	1	330	116	\$38,379
Subtotal				\$621,370
Total				\$640,011
II. Maintenance Support				
Auto Transit Shop Supv (7228)	1	165	198	\$32,670
Auto Mech Assist Sup (7249)	1	660	181	\$119,467
Automotive Mechanic (7381)	10	660	141	\$928,488
Subtotal				\$1,080,625
Total				\$1,113,043

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

III. Operations Support

Transit Manager (9141)	1	66	198	\$13,057
Transit Supervisor (9139)	1	66	153	\$10,076
Transit Operator (9163)	4	66	118	\$31,049
Subtotal				\$54,183
Total				\$55,808

Warranty Support
2 Year Warranty

Resident Engineer (5241)	1	417	222	\$92,482
Lead Engineer (5207)	1	417	194	\$80,698
Auto Mech Assist Sup (7249)	1	417	181	\$75,481
Automotive Mechanic (7381)	1	417	141	\$58,664
Subtotal				\$307,325
Total 2 Year Warranty				\$316,545

Extended Warranty

Resident Engineer (5241)	1	313	222	\$69,417
Lead Engineer (5207)	1	313	194	\$60,572
Auto Mech Assist Sup (7249)	1	313	181	\$56,656
Automotive Mechanic (7381)	1	313	141	\$44,033
Subtotal				\$230,678
Total Extended Warranty				\$237,598

IV. Total Warranty Support
\$554,142.78

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

FY 2015/16

Project Name: Replace 14 60-Foot Trolley Coaches

FUNDING PLAN - FOR CURRENT PROP K REQUEST

Prop K Funds Requested: \$5,000,000

5-Year Prioritization Program Amount: \$0 (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 recommended allocation is contingent upon an amendment to the Vehicles 5YPP to reprogram \$5,000,000 in Fiscal Year 2015/16 funds from Replace 100 ETI 40' Trolley Coaches to the subject project. See attached 5YPP amendment for details.

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	\$5,000,000			\$5,000,000
Transit Capital Priorities (federal) funds			\$20,000,000	\$20,000,000
				\$0
				\$0
				\$0
				\$0
Total:	\$0	\$0	\$20,000,000	\$25,000,000

Actual Prop K Leveraging - This Phase: 80.00%

Expected Prop K Leveraging per Expenditure Plan: 83.73%

\$25,000,000
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	
		%	\$
Prop K	\$25,000,000	20.00%	\$5,000,000

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	\$11,637,580			\$11,637,580
Transit Capital Priorities (federal) funds	\$26,550,230		\$20,000,000	\$46,550,230
				\$0
				\$0
				\$0
				\$0
				\$0
Total:	\$0	\$0	\$20,000,000	\$ 58,187,810

Actual Prop K Leveraging - Entire Project:	80.00%	\$ 58,187,900
Expected Prop K Leveraging per Expenditure Plan:	83.73%	Total from Cost worksheet
Actual Prop AA Leveraging - Entire Project:	NA	

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: \$5,000,000

Sponsor Request - Proposed Prop K Cash Flow Distribution Schedule			
Fiscal Year	Cash Flow	% Reimbursed Annually	Balance
FY 2016/17	\$5,000,000	100.00%	\$0
		0.00%	\$0
		0.00%	\$0
		0.00%	\$0
		0.00%	\$0
Total:	\$5,000,000		

**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	\$5,000,000	Procurement (e.g. rolling stock)
Total:	\$5,000,000		

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 17	FY 2016/17	\$500,000	10%	\$4,500,000
Prop K EP 17	FY 2017/18	\$4,500,000	90%	\$0
			0%	\$0
			0%	\$0
			0%	\$0
Total:		\$5,000,000	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 17	FY 2016/17	Procurement (e.g. rolling stock)	\$500,000	10%	\$4,500,000
Prop K EP 17	FY 2017/18	Procurement (e.g. rolling stock)	\$4,500,000	100%	\$0
				100%	\$0
				100%	\$0
				100%	\$0
Total:			\$5,000,000		

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:	Allocate	\$6,637,580	FY 2016/17	Procurement (e.g. rolling stock)

Trigger: Programming of FTA TCP funds by MTC or securing other funds to fund the remainder of Contract Amendment No. 1 to the New Flyer contract. The SFMTA anticipates that these funds will become available through the MTC-led TCP program cycle to begin in Spring 2016.

Deliverables:

- Quarterly progress reports shall provide percent complete for the overall project scope, the number of vehicles accepted for service and total expenses incurred (not necessarily invoiced to Prop K) in the previous quarter, in addition to the requirements described in the Standard Grant Agreement (SGA). See SGA for definitions.
- Upon placing the first vehicle into revenue service, provide two digital photos of the accepted vehicle, with at least one showing the decal with Prop K logo affixed to a vehicle.

Special Conditions:

- The recommended allocation is contingent upon an amendment to the Vehicles 5YPP to reprogram \$5,000,000 in Fiscal Year 2015/16 funds from Replace 100 ETI 40' Trolley Coaches to the subject project. See attached 5YPP amendment for details.
- The recommended allocation is contingent upon a commitment by the SFMTA to maintain the 14 new trolley coaches in a state of good repair, including a mid-life overhaul program to allow them to meet or exceed expectations for their useful lives per FTA guidelines.
- The Transportation Authority will only reimburse SFMTA up to the approved overhead multiplier rate for the fiscal year that SFMTA incurs charges.

Notes:

- Reminder on Attribution: A decal identifying the Transportation Authority and Prop K sales tax funds should be affixed to equipment purchased with Prop K funds. In addition, press releases related to the project should include the following statement: "This project was made possible in part with Proposition K Sales Tax dollars provided by the San Francisco County Transportation Authority." See Section 3.H.a in the SGA for additional details.
- Prop K funds from the New and Renovated Vehicles - Muni Expenditure Plan category will cover expenses for replacement vehicles only.

Supervisory District(s):

Prop K proportion of expenditures - this phase:	20.00%
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:

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:	\$ 5,000,000
		Current Prop AA Request:	\$ -

Project Name: Replace 14 60-Foot Trolley Coaches

Implementing Agency: San Francisco Municipal Transportation Agency

Project Manager

Grants Section Contact

Name (typed): Gary Chang, P.E.

Joel Goldberg

Title: Project Manager

Manager,
Capital Procurement & Mgmt

Phone: (415) 401-3173

(415) 701-4499

Fax: _____

(415) 701-4734

Email: gary.chang@sfmta.com

Joel.Goldberg@sfmta.com

Address: 700 Pennsylvania Ave, Building
200, San Francisco, CA 94107

1 South Van Ness Avenue, 8th
floor, San Francisco, CA 94103

Signature: _____

Date: _____

5-Year Project List (FY 2014/15 - FY 2018/19)
Vehicles - Muni (EP 17M)
Programming and Allocations to Date
 Pending 05.24.16

Agency	Subcategory	Project Name	Phase	Status	Fiscal Year					Total
					2014/15	2015/16	2016/17	2017/18	2018/19	
SFMTA		Historic Vehicle Rehabilitation/Replacement (16 PCC)	PROC	Programmed			\$4,785,063			\$4,785,063
SFMTA		Historic Vehicle Rehabilitation/Replacement (Milan and Vintage)	PROC	Programmed			\$3,304,749			\$3,304,749
SFMTA		Replace 34 Neoplan 40' Motor Coaches and Replace 6 Neoplan 60' Buses ^{2,3}	PROC	Programmed		\$0				\$0
SFMTA		Replace 41 Neoplan 40' Motor Coaches and Replace 48 Neoplan 60' Motor Coaches (2015/16) ^{3,4}	PROC	Programmed		\$0				\$0
SFMTA		61 60-ft Low Floor Diesel Hybrid Motor Coaches (26 replace+35 expand) ²	PROC	Allocated		\$12,352,094				\$12,352,094
SFMTA		48 40-ft and 50 60-ft Low Floor Diesel Hybrid Motor Coaches ³	PROC	Allocated		\$33,405,243				\$33,405,243
SFMTA		Replace 30 Orion 30' Motor Coaches and Replace 56 Orion 40' Motor Coaches (2018/19)	PROC	Programmed					\$26,433,627	\$26,433,627
SFMTA		85 40-ft and 63 60-ft Low-Floor Hybrid Diesel Motor Coaches ⁴	PROC	Allocated		\$47,641,538				\$47,641,538
SFMTA		85 40-ft and 63 60-ft Low-Floor Hybrid Diesel Motor Coaches ⁴	Warranty	Allocated		\$227,462				\$227,462
SFMTA		Motor Coach Replacement Warranty: 30' Motor Coaches (30), 40' Motor Coaches (211), 60' Motor Coaches (124)	Warranty	Programmed		\$150,000				\$150,000
SFMTA		Replace 60 New Flyer 60' Trolley Coaches (2014/15)	PROC	Programmed	\$168,224					\$168,224
SFMTA		Replace 60 New Flyer 60' Trolley Coaches (2014/15)	PROC	Allocated		\$20,831,776				\$20,831,776
SFMTA		Replace 100 ETI 40' Trolley Coaches (2015/16) ^{4,5}	PROC	Programmed		\$37,943,313				\$37,943,313
SFMTA		Replace 14 60-Foot Trolley Coaches ⁵	PROC	Pending		\$5,000,000				\$5,000,000
SFMTA		Replace 33 ETI 60' Trolley Coaches	PROC	Programmed			\$16,111,653			\$16,111,653
SFMTA		Replace 75 ETI 40' Trolley Coaches	PROC	Programmed			\$40,208,302			\$40,208,302
SFMTA		Replace 65 ETI 40' Trolley Coaches with 12 60' Trolley Coaches	PROC	Programmed				\$5,858,783		\$5,858,783
SFMTA		Trolley Coach Replacement Warranty: 40' Trolley Coaches (175); 60' Trolley Coaches (105)	Warranty	Programmed			\$150,000			\$150,000
SFMTA		Paratransit Van Replacement: Class B Vehicle (35)	PROC	Programmed					\$931,019	\$931,019
SFMTA		LRV Procurement*	PROC	Allocated		\$60,116,310				\$60,116,310

Agency	Project Name	Phase	Status	Fiscal Year					Total
				2014/15	2015/16	2016/17	2017/18	2018/19	
			Programmed in 5YPP	\$81,116,310	\$136,719,650	\$64,559,767	\$5,858,783	\$27,364,646	\$315,619,156
			Total Allocated and Pending in 5YPP	\$80,948,086	\$98,026,337	\$0	\$0	\$0	\$179,574,423
			Total Deobligated in 5YPP	\$0	\$0	\$0	\$0	\$0	\$0
			Total Unallocated in 5YPP	\$168,224	\$38,093,313	\$64,559,767	\$5,858,783	\$27,364,646	\$136,044,733
			Total Programmed in 2014 Strategic Plan	\$77,536,310	\$136,719,650	\$64,559,767	\$5,858,783	\$27,364,646	\$312,039,156
			Deobligated from Prior 5YPP Cycles **	\$4,721,316					\$4,721,316
			Cumulative Remaining Programming Capacity	\$1,414,316	\$1,414,316	\$1,414,316	\$1,414,316	\$1,414,316	\$1,414,316

Programmed
Pending Allocation / Appropriation
Board Approved Allocation / Appropriation

Footnotes:

- ¹ Strategic Plan and comprehensive 5YPP Amendment to accommodate SFMTA's LRV Procurement project (Res. 15-12, 10.21.14).
- ² Reduced funds for Replace 34 Neoplan 40' Motor Coaches and Replace 76 Neoplan 60' Buses by \$12,352,094 and programmed to Procure 61 60' Low Floor Diesel Hybrid Coaches. (Res. 15-61, 06.23.15)
- ³ 5YPP Amendment to accommodate allocation of \$33,405,094 for the Procure 48 40' and 50 60' Low Floor Diesel Hybrid Coaches project (Res. 15-61, 06.23.15):
 Replace 34 Neoplan 40' Motor Coaches and Replace 76 Neoplan 60' Buses: Reduced by \$33,113,072 in Fiscal Year 2015/16.
- ⁴ 5YPP Amendment to accommodate allocation of \$47,869,000 for the 85 40-ft and 63 60-ft Low-Floor Hybrid Diesel Motor Coaches project (Res. 16-040, 02.23.2016):
 Replace 41 Neoplan 40' Motor Coaches and Replace 48 Neoplan 60' Motor Coaches (2015/16): Reduced by \$37,201,244 in Fiscal Year 2015/16.
 Replace 100 ETI 40' Trolley Coaches: Reduced by \$10,667,756 in Fiscal Year 2015/16.
- ⁵ 5YPP Amendment to accommodate allocation of \$5,000,000 for the Replace 14 60-Foot Trolley Coaches project (Res. 16-XXX, xx.xx.2016):
 Replace 100 ETI 40' Trolley Coaches (2015/16): Reduced by \$5,000,000 in Fiscal Year 2015/16.
 Replace 14 60-Foot Trolley Coaches: Added project with \$5,000,000 in Fiscal Year 2015/16 funds.

**5-Year Project List (FY 2014/15 - FY 2018/19)
Vehicles - Muni (EP 17M)
Cash Flow (\$) Maximum Annual Reimbursement**
Pending_05.24.16

Subcategory	Project Name	Phase	Fiscal Year											Total			
			2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25				
	Historic Vehicle Rehabilitation/Replacement (16 PCC)	PROC			\$1,559,931	\$1,612,566	\$1,612,566	\$1,612,566									\$4,785,063
	Historic Vehicle Rehabilitation/Replacement (Milan and Vintage)	PROC			\$376,742	\$1,457,394	\$1,457,394										\$3,304,749
	Replace 34 Neoplan 40' Motor Coaches and Replace 76 Neoplan 60' Buses 2-3	PROC		\$0	\$0	\$0											\$0
	Replace 41 Neoplan 40' Motor Coaches and Replace 48 Neoplan 60' Motor Coaches (2015/16) 3, 4	PROC		\$0	\$0												\$0
	61 60-ft Low Floor Diesel Hybrid Motor Coaches (26 replace+35 expand) 2	PROC		\$12,352,094													\$12,352,094
	48 40-ft and 50 60-ft Low Floor Diesel Hybrid Motor Coaches 3	PROC		\$17,000,000	\$16,405,243												\$33,405,243
	Replace 30 Orion 30' Motor Coaches and Replace 56 Orion 40' Motor Coaches (2018/19)	PROC				\$13,216,814	\$13,216,814										\$26,433,627
	85 40-ft and 63 60-ft Low-Floor Hybrid Diesel Motor Coaches 4	PROC		\$429,000	\$39,000,000	\$8,212,538											\$47,641,538
	85 40-ft and 63 60-ft Low-Floor Hybrid Diesel Motor Coaches 4	Warranty			\$32,495	\$32,495	\$32,495	\$32,495	\$32,495	\$32,495	\$32,495	\$32,495	\$32,495	\$32,495	\$32,495	\$32,495	\$227,462
	Motor Coach Replacement Warranty: 30' Motor Coaches (30), 40' Motor Coaches (211), 60' Motor Coaches (124)	Warranty		\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$150,000
	Replace 60 New Flyer 60' Trolley Coaches (2014/15)	PROC	\$0	\$168,224													\$168,224
	Replace 60 New Flyer 60' Trolley Coaches (2014/15)	PROC	\$2,100,000	\$12,800,000	\$5,931,776												\$20,831,776
	Replace 100 EIT 40' Trolley Coaches (2015/16) 4, 5	PROC		\$0.00	\$17,034,996	\$20,908,317											\$37,943,313
	Replace 14 60-Foot Trolley Coaches 5	PROC			\$500,000	\$4,500,000											\$5,000,000
	Replace 33 EIT 60' Trolley Coaches	PROC			\$8,055,827	\$8,055,827											\$16,111,653
	Replace 75 EIT 40' Trolley Coaches	PROC			\$15,548,550	\$24,659,752											\$40,208,302
	Replace 65 EIT 40' Trolley Coaches with 12 60' Trolley Coaches	PROC				\$2,929,392	\$2,929,392										\$5,858,783
	Trolley Coach Replacement Warranty: 40' Trolley Coaches (175); 60' Trolley Coaches (105)	Warranty			\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$150,000
	Paratransit Van Replacement: Class B Vehicle (35)	PROC				\$931,019											\$931,019
	LRV Procurement*	PROC				\$382,369	\$2,965,510	\$8,388,642	\$9,784,631	\$10,075,544	\$10,128,849	\$10,128,849	\$10,128,849	\$10,128,849	\$10,128,849	\$10,128,849	\$60,116,310

Project Name	Phase	Fiscal Year												Total
		2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25		
Cash Flow Programmed in 5YPP		\$2,100,000	\$42,764,318	\$104,475,560	\$72,398,279	\$20,222,898	\$13,661,677	\$3,028,005	\$8,451,137	\$9,847,126	\$10,105,544	\$10,158,849	\$215,619,156	
Total Cash Flow Allocated		\$2,100,000	\$42,581,094	\$61,869,514	\$12,745,032	\$32,495	\$0	\$0	\$0	\$0	\$0	\$0	\$119,328,135	
Total Cash Flow Decobligated		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Total Cash Flow Unallocated		\$0	\$183,224	\$42,606,046	\$59,653,247	\$20,190,403	\$13,661,677	\$3,028,005	\$8,451,137	\$9,847,126	\$10,105,544	\$10,158,849	\$196,291,021	
Total Cash Flow in 2014 Strategic Plan		\$2,100,000	\$71,652,615	\$88,494,768	\$59,653,247	\$20,190,403	\$10,049,183	\$2,995,510	\$8,418,642	\$9,814,631	\$10,105,544	\$10,158,849	\$312,039,156	
Deobligated from Prior 5YPP Cycles **		\$4,721,316											\$4,721,316	
Cumulative Remaining Cash Flow Capacity		\$4,721,316	\$33,609,613	\$17,628,821	\$4,883,789	\$4,851,294	\$1,238,800	\$1,206,305	\$1,173,811	\$1,141,316	\$1,141,316	\$1,141,316	\$1,141,316	
Programmed														
Pending Allocation/Appropriation														
Board Approved Allocation/Appropriation														



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**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.

The San Francisco Municipal Transportation Agency (SFMTA) requests \$4,400,000 in Prop K funds for the planning and design phases of a project to renovate a 45 year-old pre-engineered industrial building at 1570-1580 Burke Avenue currently housing the Central Warehouse for the SFMTA Materials Management Section. The scope of work will renovate the existing building including any needed seismic or structural work and include tenant improvements to house the SFMTA Overhead Lines Section. The goal of the project is to relocate Overhead Lines to support their mission to respond to electric trolley service interruptions, maintenance and any unsafe conditions of the overhead electric power lines. The project will also improve, through investment in improved shelving systems and inventory management systems, the capacity of Central Warehouse to carry out its mission.

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

Background

Project will rehabilitate the 103,231 square feet of the SFMTA Burke Facility, constructed in 1969 and purchased by the SFMTA in 2005 using federal and Prop K funds with the intention of renovating it to be a modern facility to house SFMTA's overhead lines maintenance functions and increase parts storage efficiency.

The former 1968 canned goods storage warehouse was converted to a United States Postal Services processing facility in 1989. The property was purchased in 2005 for the SFMTA. It was found to be suitable for SFMTA user needs and in conformity with the SF General Plan. After the property was purchased, the SFMTA moved a significant portion of its storage activities into the building. Currently, the site operates daily parts distribution and maintains the SFMTA's inventory levels. The warehouse also acts as an overflow storage space. The SFMTA Materials Management Section is now utilizing the west wing and other significant portions of the building. The building footprint is 103,231 square feet. The full property area is 105,000 square feet with a portion at the front of the building set back from the sidewalk a distance of 20 feet by 100 feet for parking spaces, access to several doors, and utilities. An electricity transformer is located in this area and two exterior concrete wheelchair access ramps rising 4 to 6 inches from paved grade to the door thresholds at building floor level. The majority of the building is built to the property lines.

The SFMTA's Real Estate and Facilities Vision, completed in 2013, found significant potential for increased efficiency at Burke, which is the SFMTA's central parts storage warehouse. In addition, the SFMTA completed a Facilities Condition Assessment in early 2016, identifying a program of \$2.5 million in improvements needed to continue its current operations. The Board of Supervisors recently approved a plan to move the City's Animal Care and Control (ACC) department into the building at 1401 Bryant Street currently occupied by the Overhead Lines group, and to proceed with its earlier plan to relocate Overhead Lines to the Burke facility. The SFMTA must complete the relocation of Overhead Lines by May 2018 to allow for the remodeling necessary to house ACC, requiring a highly compressed schedule for the Burke Facility Renovation project.

Scope

Rehabilitation of the Burke Avenue facility will include new: roof, building cladding, insulation, foundation improvements, lighting, heating, air conditioning, staff kitchens, training rooms, restrooms, and other interior improvements. Approximately 50,000 square feet of the remodeled facility will be assigned to the Overhead Lines Group. The remaining square footage will be modernized and optimized to serve as the central store of parts and supplies for the SFMTA. The major functions of the rehabilitated facility will be to store and distribute parts used at various SFMTA vehicle maintenance facilities, house shops required for the overhead lines maintenance crew and create sufficient parking for heavy duty equipment and vehicles.

Based on recent facility evaluations, existing defects or limitations at the Burke facility include poor lighting, older and leaky roof, lack of insulation, bowed concrete slabs, inadequate heating and cooling, rusted building exterior and roof leaks. The proposed facility improvements will enhance SFMTA's operational performance and safety by relocating overhead lines personnel, parts and equipment into a seismically safe building. Current accommodations are located in an older brick building at 1401 Bryant Street. Other benefits include more efficient use of space for parts storage and distribution and improved working conditions.

Project Delivery Method

The project requires phased construction within a facility that must maintain continuous operations. San Francisco Public Works (SFPW) will provide design services (with assistance from consultants) and contract and construction management services. The project plan for the Burke Renovation is based on procuring a construction manager/general contractor (CMGC) for the prime contract. Early in the design development phase SFPW will procure the CMGC and award a professional services contract for pre-construction services. This benefits the project by leveraging the expertise of the general contractor who will actually perform the work, while allowing the SFMTA and SFPW managers to exercise control of the design and the way the phased construction work will affect facility operations.

Select components of the project will be delivered by design/build subcontractors. The CMGC will prepare bid packages for the trade subcontractors based on construction documents prepared by SFPW. SFPW and SFMTA will review the trade bid packages for conformance with project requirements prior to advertising. Upon completion of SFPW and the CMGC review of subcontract bids, SFPW will authorize the CMGC to award subcontracts to the lowest responsible responsive bidders.

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

FY 2015/16

Project Name: Burke Facility Renovation

Implementing Agency: San Francisco Municipal Transportation Agency

ENVIRONMENTAL CLEARANCE

Type : TBD

Status: Not yet started

SFMTA anticipates that environmental clearance will entail a Categorical Exemption

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	3	FY 2015/16	2	FY 2016/17
Environmental Studies (PA&ED)	4	FY 2015/16	3	FY 2016/17
R/W Activities/Acquisition				
Design Engineering (PS&E)	1	FY 2016/17	3	FY 2016/17
Prepare Bid Documents	2	FY 2016/17	3	FY 2016/17
Advertise Construction	1	FY 2016/17	4	FY 2016/17
Start Construction (e.g., Award Contract)	1	FY 2016/17		
Procurement (e.g. rolling stock)				
Project Completion (i.e., Open for Use)			1	FY 2018/19
Project Closeout (i.e., final expenses incurred)			2	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.

The schedule for advertising includes both CMGC selection, which happens early in design phase so prime contractor can provide input, and bidding out the trade subcontractors, which happens after 100% design.

See project schedule attachment, next page.

Schedule Attachment

Task	Calendar Years												
	2016				2017				2018				
	1	2	3	4	1	2	3	4	1	2	3	4	
SFMTA 1570 Burke Facility Renovation 3-Phase Construction; Completion target: 7/1/18													
Concept Design, SFMTA select preferred scenario													
Submit Preliminary Project Assessment and Environmental Evaluation to Planning Department		X	X										
Complete CEQA Categorical Exemption													
Schematic Design, Design Development, Construction Documents Permits													
Hire CMGC; CMGC Preconstruction Services; Bid Trade Pkgs													
Construction Phase 1 - 5 Mos.													
Construction Phase 2 - 4 Mos.													
Construction Phase 3 - 4 Mos.													
Moves (Materials Management activities to different parts of the Burke facility for different phases of construction and Overhead Lines group from Bryant to Burke)													

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

FY 2015/16

Project Name: Burke Facility Renovation

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 Environmental Studies (PA&ED)	Yes	\$ 610,000	\$ 470,000	
Design Engineering (PS&E) R/W Activities/Acquisition	Yes	\$ 3,940,000	\$ 3,930,000	
Construction				
Procurement (e.g. rolling stock)				
		\$ 4,550,000	\$ 4,400,000	\$ -

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)	\$ 610,000	Department of Public Works/Pre-Development Report
Design Engineering (PS&E) R/W Activities/Acquisition	\$ 3,940,000	Department of Public Works/Pre-Development Report
Construction	\$ 25,450,000	Department of Public Works/Pre-Development Report
Procurement (e.g. rolling stock)		
Total:	\$ 30,000,000	

% Complete of Design: 0 as of 4/12/16
Expected Useful Life: 30 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.	

BURKE RENOVATION PROJECT SUMMARY BY TASK					
Task	Totals	SFMTA	Public Works	Consultants & CMGC	% of Request
Perform Geotechnical Investigation	\$ 190,000	\$ 20,000	\$ 50,000	\$ 120,000	4.3%
Perform Structural Investigation Existing					
Building Members and Foundations	\$ 270,000	\$ 20,000	\$ 50,000	\$ 200,000	6.1%
Develop CMGC Criteria Package *	\$ 430,000	\$ 30,000	\$ 200,000	\$ 200,000	9.8%
Develop 35% Design for CMGC contractor	\$ 995,000	\$ 100,000	\$ 395,000	\$ 500,000	22.6%
Develop 100% Design for CMGC Contractor	\$ 1,850,315	\$ 226,909	\$ 540,343	\$ 1,083,063	42.1%
Environmental and Regulatory Approvals (Permits, etc.)	\$ 170,000				3.9%
Phase Contingency (Pre-Engineering/Detail Design)	\$ 494,685				11.2%
TOTAL	\$ 4,400,000	\$ 396,909	\$ 1,235,343	\$ 2,103,063	

* SFPW anticipates enlisting its on-call architectural/engineering consultant to help develop the CMGC criteria package

MFB = Mandatory Fringe Benefits, FTE = Full Time Equivalent

BURKE RENOVATION PROJECT LABOR DETAIL							
Position	Unburdened Salary	MFB	Overhead = 1.143 * (Salary + MFB)	Burdened Salary	FTE Ratio	Hours	Cost
SFMTA Staff							
Associate Engineer (5207)	\$ 126,443	\$ 65,969	219,927	\$ 412,340	0.250	520	\$ 103,085
Senior Engineer (5211)	\$ 169,430	\$ 83,434	289,023	\$ 541,887	0.077	160	\$ 41,684
Project Manager II (5504)	\$ 156,959	\$ 78,357	268,966	\$ 504,281	0.500	1040	\$ 252,141
Subtotal SFMTA CP&C Division Labor						1720	\$ 396,909

Position	Unburdened Salary	MFB	Overhead = .73564 * (Salary + MFB)	Burdened Salary	FTE Ratio	Hours	Cost
Public Works Staff Estimate							
Associate Engineer (5207)	\$ 126,443	\$ 65,969	141,558	\$ 333,970	0.500	1040	\$ 166,985
Senior Engineer (5211)	\$ 169,430	\$ 83,434	186,032	\$ 438,896	0.173	360	\$ 75,963
Architectural Associate I (5207)	\$ 103,116	\$ 53,799	115,442	\$ 272,357	1.000	2080	\$ 272,357
Architectural Associate II (5266)	\$ 120,042	\$ 62,629	134,391	\$ 317,063	1.000	2080	\$ 317,063
Architect (5268)	\$ 138,970	\$ 72,505	155,582	\$ 367,056	0.500	1040	\$ 183,528
Senior Architect (5211)	\$ 169,430	\$ 83,434	186,032	\$ 438,896	0.500	1040	\$ 219,448
Subtotal SFMTA CP&C Division Labor						6240	\$ 1,235,343

TOTAL CURRENT SFMTA PROP K REQUEST (ROUNDED)

Total Prop K Request: **\$ 4,400,000**

OTHER PROJECT PHASES NOT PART OF CURRENT PROP K REQUEST	
Planning Phase/Building Program	\$ 150,000
Construction Contract Estimate	\$ 19,600,000
Furniture, Fixtures and Equipment	\$ 600,000
Moving Expenses	\$ 400,000
Construction Management	\$ 920,000
Construction Phase/Market Contingency (18.3%)	\$ 3,930,000

PROJECT TOTAL \$ 30,000,000

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

FY 2015/16

Project Name: Burke Facility Renovation

FUNDING PLAN - FOR CURRENT PROP K REQUEST

Prop K Funds Requested: \$4,400,000

5-Year Prioritization Program Amount: \$0 (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.

Funding the subject request requires an amendment to the Facilities - Muni 5YPP to reprogram \$1,903,327 in FY2014/15 funds from the Implementation of Various Facility Plans: Placeholder and \$2,596,673 from cumulative remaining programming capacity to the subject project. See attached 5YPP amendment for details.

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	\$4,400,000			\$4,400,000
SFMTA operating		\$150,000		\$150,000
				\$0
				\$0
				\$0
				\$0
Total:	\$4,550,000	\$0	\$0	\$4,550,000

Actual Prop K Leveraging - This Phase: 3.30%

Expected Prop K Leveraging per Expenditure Plan 89.66%

\$4,550,000
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?

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
Prop K	\$4,400,000			\$4,400,000
SFMTA Operating Funds		\$150,000		\$150,000
Prop A General Obligation Bond		\$25,450,000		\$25,450,000
				\$0
				\$0
				\$0
Total:		\$25,600,000	\$30,000,000	\$ 30,000,000

Actual Prop K Leveraging - Entire Project:	<input type="text" value="85.33%"/>	<input type="text" value="\$ 30,000,000"/>
Expected Prop K Leveraging per Expenditure Plan:	<input type="text" value="89.66%"/>	Total from Cost worksheet
Actual Prop AA Leveraging - Entire Project:	<input type="text" value="NA"/>	

FISCAL YEAR CASH FLOW DISTRIBUTION FOR CURRENT PROP K REQUEST

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

Prop K Funds Requested:

Sponsor Request - Proposed Prop K Cash Flow Distribution Schedule			
Fiscal Year	Cash Flow	% Reimbursed Annually	Balance
FY 2015/16	\$500,000	11.00%	\$3,900,000
FY 2016/17	\$3,900,000	89.00%	\$0
		0.00%	\$0
		0.00%	\$0
		0.00%	\$0
Total:	\$4,400,000		

**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		\$470,000	Planning/Conceptual Engineering
Prop K Allocation		\$3,930,000	Design Engineering (PS&E)
Total:		\$4,400,000	

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

Multi-phase allocation is recommended given the overlapping schedules of the phases and the compressed schedule for the project as a whole.

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

Source	Fiscal Year	Maximum Reimbursement	% Reimbursable	Balance
Prop K EP 20	FY 2015/16	\$500,000	11%	\$3,900,000
Prop K EP 20	FY 2016/17	\$3,900,000	89%	\$0
			0%	\$0
			0%	\$0
			0%	\$0
Total:		\$4,400,000	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 20	FY 2015/16	Planning/Conceptual Engineering	\$470,000	11%	\$3,930,000
Prop K EP 20	FY 2015/16	Design Engineering (PS&E)	\$30,000	11%	\$3,900,000
Prop K EP 20	FY 2016/17	Design Engineering (PS&E)	\$3,900,000	100%	\$0
				100%	\$0
				100%	\$0
Total:			\$4,400,000		

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:

- Monthly (in lieu of quarterly) progress reports shall provide the anticipated completion dates of key project milestones, including 35% design, 65% design and 100% design in addition to all other requirements described in the Standard Grant Agreement (SGA). See SGA for definitions.
- The SFMTA will provide an overview of its Facilities Program at an upcoming Plans and Programs Committee and Citizens Advisory Committee meeting.
- Upon completion of 35% design (anticipated by July 18, 2016), provide updated scope, schedule, major line item budget and funding plan. See Special Condition 3 below.
- Upon project completion, provide evidence of completion of 100% design (e.g. copy of certifications page).

Special Conditions:

- The recommended allocation is contingent upon amendment of the Facilities-Muni 5YPP to reprogram \$1,903,327 in FY 2014/15 funds from the Implementation of Various Facility Plans: Placeholder and \$2,596,673 from cumulative remaining programming capacity to the subject project. See attached 5YPP amendment for details.
- Transportation Authority staff or its Project Management Oversight consultant will participate in bi-weekly design team coordination meetings and participate on the selection panel for the CMGC.
- SFMTA may not expend final design and contingency funds (\$2,345,000) until Transportation Authority staff releases the funds pending receipt of updated scope, schedule, major line item budget and funding plan on completion of 35% design (anticipated July 18, 2016). See Deliverable 3 above.

Notes:

- The SFMTA will need to request that the Transportation Authority waive the Prop K policy prohibiting advertisement of contracts funded with Prop K prior to allocation by the Authority Board. The SFMTA has indicated that it wants to advertise the CMGC contract in May 2016 in order to complete construction of the Burke Facility Renovation project by May 2018.

Supervisorial District(s):

Prop K proportion of expenditures - this phase:	96.70%
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 20	FY 2015/16	Planning/Conceptual Engineering	\$470,000	100%	\$0
				100%	\$0
				100%	\$0
				100%	\$0
Total:			\$470,000		

Sub-Project # from SGA:

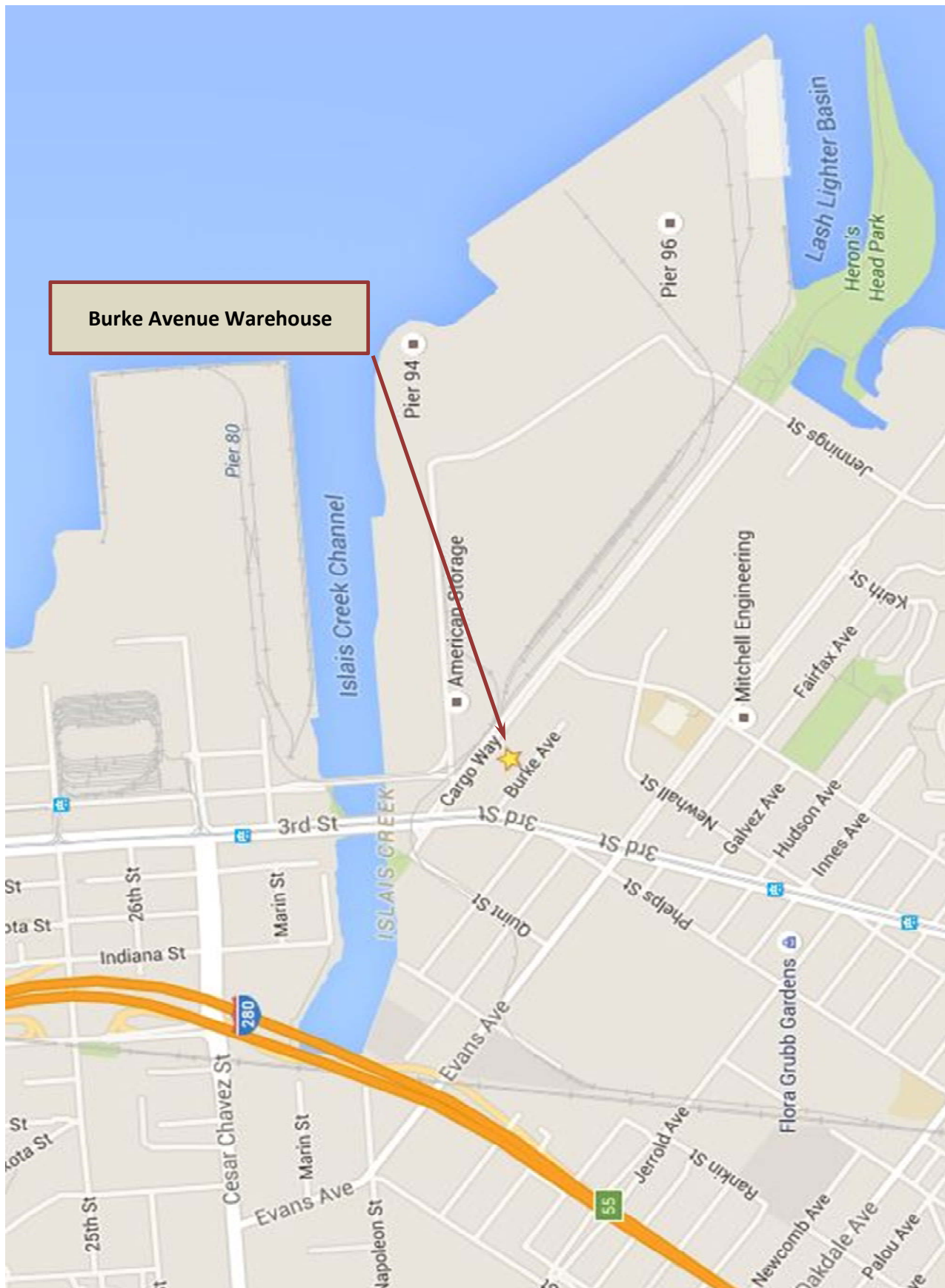
Name:

Supervisorial District(s):

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

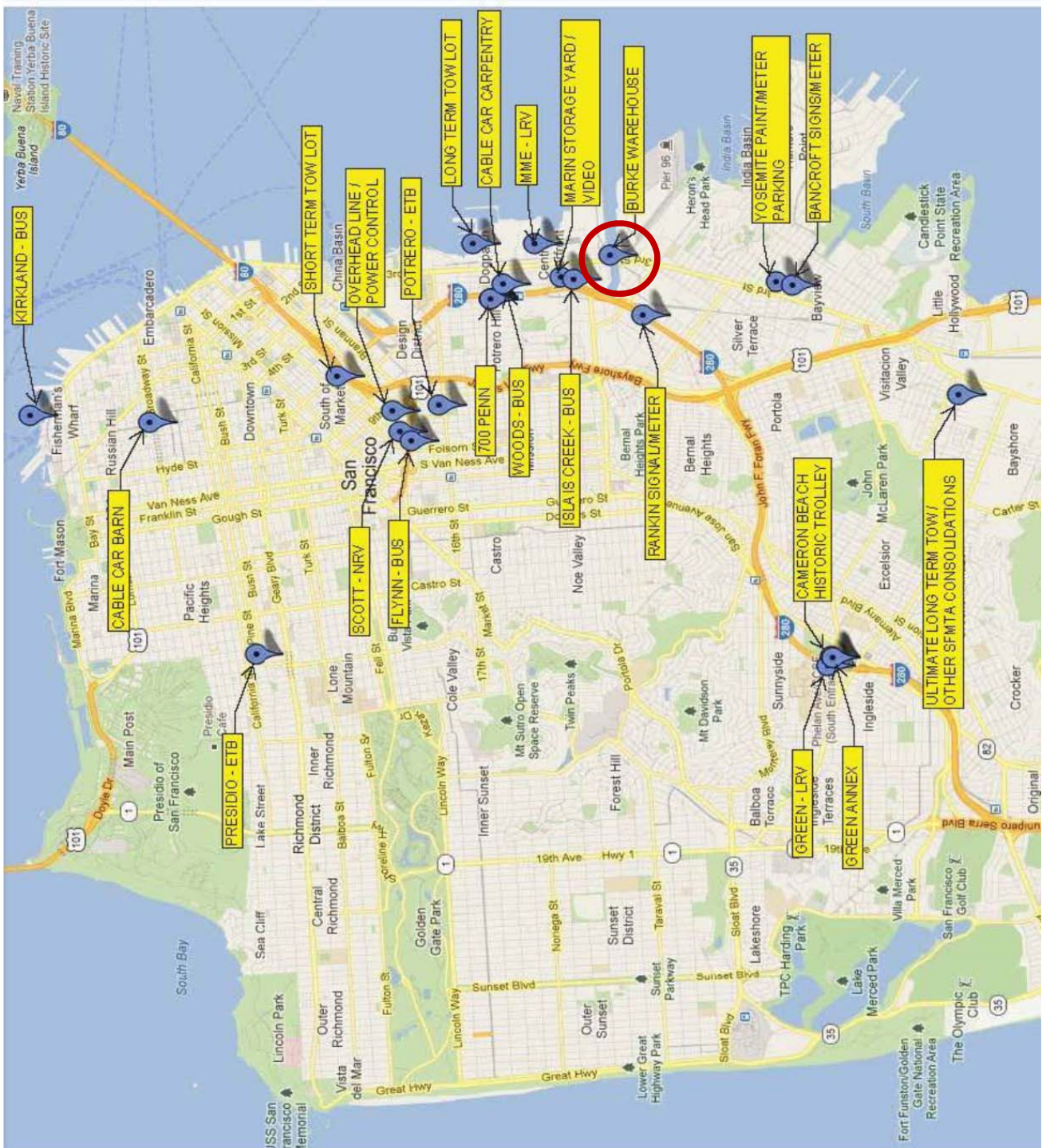
EP Line	Fiscal Year	Phase	Maximum Reimbursement	Cumulative % Reimbursable	Balance
Prop K EP 20	FY 2015/16	Design Engineering (PS&E)	\$30,000	1%	\$3,900,000
Prop K EP 20	FY 2016/17	Design Engineering (PS&E)	\$3,900,000	100%	\$0
				100%	\$0
				100%	\$0
Total:			\$3,930,000		

MAPS AND DRAWINGS



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

SFMTA Facilities Locations



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

FY of Allocation Action:	2015/16	Current Prop K Request:	\$ 4,400,000
			Current Prop AA Request:

Project Name: Burke Facility Renovation

Implementing Agency: San Francisco Municipal Transportation Agency

Project Manager

Grants Section Contact

Name (typed): David Greenaway

Joel Goldberg

Title: Project Manager

Manager, Capital Procurement & Management

Phone: 415-701-4237

415-701-4499

Fax: _____

Email: david.greenaway@sfmta.com

joel.goldberg@sfmta.com

Address: 1 South Van Ness Ave, 3rd floor

1 South Van Ness Ave, 8th floor

5-Year Project List (FY 2014/15 – FY 2018/19)
Rehab/Upgrade Existing Facilities - MUNI (EP 20M)
Programming and Allocations to Date

Pending 5/24/16 Board Action

Agency	Project Name	Phase	Status	Fiscal Year					Total
				2014/15	2015/16	2016/17	2017/18	2018/19	
Subcategory									
SEMTA	Various Facility Plans Predevelopment	PLAN/CER, PA&ED	Programmed	\$400,000					\$400,000
SEMTA	Implementation of Various Facility Plans ⁵	PS&E, CON	Programmed	\$1,096,673					\$1,096,673
SEMTA	1570 Burke Avenue Facility Renovation ⁵	PS&E	Pending		\$4,400,000				\$4,400,000
SEMTA	Paint Booth Upgrade (Woods and Potrero)	PLAN/CER, PA&ED	Programmed	\$850,000					\$850,000
SEMTA	Muni Metro East Paint and Body Shop ¹	PLAN/CER, PA&ED	Programmed	\$3,428,500					\$3,428,500
SEMTA	Muni Metro East (MME) Phase 2 ¹	PA&ED	Allocated	\$2,598,500					\$2,598,500
SEMTA	Woods Renovation Hoists and Bays ^{2,4}	PLAN/CER	Programmed	\$4,132,826					\$4,132,826
SEMTA	Fall Protection Systems - Presidio Division ⁴	CON	Allocated		\$706,397				\$706,397
SEMTA	Upgrade Life and Fire Safety Systems	PLAN/CER	Programmed	\$0					\$0
SEMTA	Upgrade Life and Fire Safety Systems ³	PS&E	Allocated		\$400,000				\$400,000
SEMTA	Fall Protection ²	PLAN/CER, PS&E	Allocated	\$2,160,777					\$2,160,777
				\$14,667,276	\$5,506,397	\$0	\$0	\$0	\$20,173,673
				Programmed in 5YPP					
				Total Allocated and Pending in 5YPP					
				\$4,759,277	\$5,506,397	\$0	\$0	\$0	\$10,265,674
				Total Deobligated in 5YPP					
				\$0	\$0	\$0	\$0	\$0	\$0
				Total Unallocated in 5YPP					
				\$9,907,999	\$0	\$0	\$0	\$0	\$9,907,999
				Total Programmed in 2014 Strategic Plan					
				\$17,277,000	\$0	\$0	\$0	\$0	\$17,277,000
				Deobligated from Prior 5YPP Cycles **					
				\$2,996,673	\$0	\$0	\$0	\$0	\$2,996,673
				Cumulative Remaining Programming Capacity					
				\$5,606,397	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Programmed									
Pending Allocation/Appropriation									
Board Approved Allocation/Appropriation									

5-Year Project List (FY 2014/15 – FY 2018/19)
Rehab/Upgrade Existing Facilities - MUNI (EP 20M)
Cash Flow (\$) Maximum Annual Reimbursement

Project Name	Phase	Fiscal Year						Total
		2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	
Subcategory								
Various Facility Plans Predevelopment	PLAN/CER, PA&ED	\$400,000						\$400,000
Implementation of Various Facility Plans 5	PS&E, CON	\$0	\$96,673	\$1,000,000				\$1,096,673
1570 Burke Avenue Facility Renovation 5	PS&E			\$4,400,000				\$4,400,000
Paint Booth Upgrade (Woods and Potrero)	PLAN/CER, PA&ED	\$725,000	\$125,000					\$850,000
Muni Metro East Paint and Body Shop 1	PLAN/CER, PA&ED	\$1,560,500	\$959,000	\$909,000				\$3,428,500
Muni Metro East (MME) Phase 2 1	PA&ED	\$998,500	\$1,600,000					\$2,598,500
Woods Renovation Hoists and Bays 2, 4	PLAN/CER	\$1,498,603	\$1,284,223	\$1,350,000				\$4,132,826
Fall Protection Systems - Presidio Division 4	CON			\$206,397	\$500,000			\$706,397
Upgrade Life and Fire Safety Systems	PLAN/CER	\$0	\$0					\$0
Upgrade Life and Fire Safety Systems 3	PS&E		\$132,000	\$268,000				\$400,000
Fall Protection 2	PLAN/CER, PS&E	\$400,000	\$1,760,777					\$2,160,777
Cash Flow Programmed in 5YPP		\$5,582,603	\$5,957,673	\$8,133,397	\$500,000	\$0	\$0	\$20,173,673
Total Cash Flow Allocated		\$1,398,500	\$3,492,777	\$4,874,397	\$500,000	\$0	\$0	\$10,265,674
Total Cash Flow Deobligated		\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Cash Flow Unallocated		\$4,184,103	\$2,464,896	\$3,259,000	\$0	\$0	\$0	\$9,907,999
Cash Flow Programmed in 2014 Strategic Plan		\$7,509,000	\$6,509,000	\$3,259,000	\$0	\$0	\$0	\$17,277,000
Deobligated from Prior 5YPP Cycles **		\$2,996,673						\$2,996,673
Cumulative Remaining Cash Flow Capacity		\$4,923,070	\$5,474,397	\$600,000	\$100,000	\$100,000	\$100,000	\$100,000
Programmed								
Pending Allocation / Appropriation								
Board Approved Allocation / Appropriation								

5-Year Project List (FY 2014/15 – FY 2018/19) Rehab/Upgrade Existing Facilities - MUNI (EP 20M) Programming and Allocations to Date

Pending 5/24/16 Board Action

Agency	Project Name	Phase	Status	Fiscal Year				Total
				2014/15	2015/16	2016/17	2017/18	

Footnotes

- ¹ To accommodate allocation of \$2,598,500 in FY 14/15 funds for the environmental phase of Muni Metro East (MME) Phase 2 (Res. 15-034, 1.27.15): Muni Metro East Paint and Body Shop: Reduced the planning/environmental placeholder from \$6,027,000 to \$3,428,500.
- ² 5YPP Amendment to fully fund the planning and design of the Fall Protection Systems project (Res. 15-041, 2.24.15): Woods Renovation Hoists and Bays: Reduced by \$1,910,777 in FY 2014/15. The SFMTA will identify additional funding for the Woods project through its Capital Improvement Program updated in Spring 2015.
 Upgrade Life and Fire Safety Systems placeholder for construction: Reduced by \$250,000.
 Fall Protection: Added project with \$2,996,673.
- ³ 5YPP amendment to fully fund the Upgrade Life and Fire Safety Systems project (Res. 16-040, 2.23.16): Cumulative remaining programming capacity: Reduced by \$400,000.
 Upgrade Life and Fire Safety Systems (design): Added project with \$400,000 in FY 2015/16 funds.
- ⁴ 5YPP amendment to fully fund the Fall Protection Systems - Presidio Division project (Res. 16-047, 3.22.15): Woods Renovation Hoists and Bays: Reduced by \$706,397 in FY 2014/15. The SFMTA is reprioritizing planned facilities improvements as part of its Capital Improvements Program update, anticipated to be complete in Spring 2016, and the Woods Division project is not expected to move forward.
 Fall Protection Systems - Presidio Division: added project with \$706,397 in FY 2015/16 funds for construction.
- ⁵ 5YPP amendment to fully fund the Burke Facility Renovation (Res. 16-XXX, 5.24.15): Implementation of Various Facility Plans: Placeholder reduced by \$1,903,327 in FY 2014/15
 Cumulative Remaining Programming Capacity: Reduced by \$2,596,673
 Burke Facility Renovation: added project with \$4,400,000 in FY 2015/16 funds for planning and design.



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**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.

The SFMTA requests \$199,451 in Prop K Neighborhood Transportation Improvement Programming (NTIP) capital funds and a commitment to allocate \$78,696 in Prop K funds to implement bicycle and pedestrian safety upgrades on Arguello Boulevard between Fulton Street and West Pacific Avenue. These recommended upgrades are the result of a community engagement process funded by a grant of Prop K NTIP planning funding.

Please see attached word document for full scope, background, and task list.

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

The SFMTA requests \$199,451 in Prop K Neighborhood Transportation Improvement Programming (NTIP) capital funds and a commitment to allocate \$78,696 in NTIP capital funds to implement bicycle and pedestrian safety upgrades on Arguello Boulevard between Fulton Street and West Pacific Avenue. This project will utilize funds from the NTIP, which is intended to strengthen project pipelines and advance the delivery of community-supported neighborhood-scale projects, especially in Communities of Concern and other neighborhoods with high unmet needs. This project's recommended upgrades are the result of a community engagement process funded by a District 1 NTIP Planning grant.

Background

In March of 2015, the Livable Streets subdivision of the SFMTA received \$100,000 in Prop K NTIP funds to engage the community, the Supervisor's Office and other relevant stakeholders to plan and develop conceptual designs for improvements to bicycle and pedestrian safety on Arguello Boulevard and for people walking and biking to Golden Gate Park from District 1.

As part of this planning process, the project team split the NTIP Planning project into three parts: The Arguello Boulevard Safety Project, the Inner Richmond Neighborhood Greenways Project, and the 23rd Avenue Neighborhood Greenway Project. The Arguello Boulevard Safety Project was based on a background of community outreach and fell under a SF Public Works paving deadline, so this project was selected to begin immediately. The Arguello project team conducted a planning and community engagement process to plan bicycle and pedestrian safety improvements for Arguello Boulevard, which resulted in a final, legislated design for changes to the roadway striping. These paint-only treatments are ready to be implemented as early as funding is approved for implementation. These changes include:

1. Buffered Bike Lane: Narrowing wide vehicle travel lanes allows for space to paint a 2 foot buffer alongside the existing bike lanes on Arguello Boulevard. This will further separate and clearly delineate spaces on the street for motor vehicles and bicycles
2. Green Paint Treatments: Strategic use of green paint will accentuate the bike lane, increase visibility of the bicycle facility, and discourage cars from driving in/double parking in the bike lane.
3. Bike Boxes and Two-Stage Left Turn Boxes: These paint treatments will allow bicycles to make safe turns into and out of side streets and will create a space for bicycles waiting at red lights.
4. Daylighting at Intersections: "Daylighting" increases the visibility of pedestrians by removing one parking space on the approach to crosswalks.
5. New Continental Crosswalks: Brightly painted continental crosswalks increase pedestrian visibility and improve vehicle yield rates.

Additionally, the project team proposed several concrete pedestrian islands and concrete pedestrian safety bulbouts, which would be constructed along with the Public Works paving project in 2017.

This allocation request would fund the implementation of the paint upgrades and the detailed design of concrete elements proposed by the Arguello Boulevard Safety Project. The SFMTA would seek action on the requested commitment to allocate \$78,696 in Prop K funds for post-paving paint work when SFPW's paving project is ready to proceed with construction.

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

The Inner Richmond Neighborhood Greenways Project and the 23rd Avenue Neighborhood Greenway Project are moving forward on separate timelines. Implementation of those projects will be handled by future funding requests.

Scope

The scope for this funding request can be divided into two parts, (1) the implementation of paint-only upgrades to the roadway striping on Arguello Boulevard, and the (2) detailed design of concrete elements that will be coordinated with the upcoming public works paving project.

It is the recommendation of the SFMTA that the paint-only upgrades be implemented as soon as possible, in advance of the planned Public Works paving project currently scheduled for 2017. Arguello Boulevard is a Cyclist High Injury Corridor, designated by the SFMTA and the SF Department of Public Health, and these safety improvements will increase safety for people riding bikes and walking along Arguello Boulevard. Only necessary striping changes will be implemented before the paving project, with add-on elements like green and khaki paint treatments to be implemented following the paving project.

1. Implementation of paint upgrades:

- \$188,931 of this funding request will pay for SFMTA crews to grind and restripe the roadway striping on Arguello Boulevard in 2016 to install safety improvements for people walking and biking. These paint changes will not include green or khaki StreetBond paint treatments due to the imminent paving project in 2017.
- Following the paving project in 2017, \$78,696 in future Prop K funding will be used to implement the proposed green and khaki StreetBond paint treatments such as bike boxes, green bike lane treatments, and khaki Painted Safety Zones. SFPW will pay for restriping of all the paint work done in the prior bullet.

2. Detailed Design of concrete upgrades:

- \$10,520 of this funding request will be sent to DPW to pay for the design of pedestrian safety bulbouts and pedestrian safety islands.
- This design work will be done by DPW in coordination with their curb ramp design work as part of the Arguello Boulevard paving project.
- *Note:* Construction of these concrete elements will be funded via a future funding request.

Tasks and Deliverables

Tasks and deliverables included in the scope of the project include the following, assuming funding is available June 1, 2016:

Task	Timeline	Deliverable
1. Create work orders for paint upgrades to Arguello Boulevard and obtain signatures	June 2016	
2. Grind and restripe Arguello Boulevard	July/August 2016	2-3 digital photos of implemented roadway striping upgrades

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

Task	Timeline	Deliverable
3. Detailed design by Public Works of concrete upgrades to be coordinated with 2017 paving project	June-September 2016	Final detailed designs and cost estimates for concrete upgrades

Project Results

Firstly, this project will result in the implementation of paint-only safety improvements this summer for people walking and biking on Arguello Boulevard, as planned by the Arguello Boulevard Safety Project. These upgrades will increase the visibility of pedestrians crossing the street, provide a buffer zone to separate people biking from moving vehicle traffic, provide safe waiting zones for people on bikes making left turns, and address documented collision patterns between motor vehicles and people walking and biking on Arguello Boulevard. Second, this project will pay for Public Works to design concrete improvements along with their 2017 paving project that will increase safety for people walking and biking on Arguello Boulevard. This project would result in approximately 30 fewer parking spaces, or about 2% of parking spaces within one block of Arguello.

Benefits

This project will support the following goals from the SFMTA Strategic Plan:

1. **Safety:** Create a safer transportation experience for everyone.
This project will address documented collision patterns and community concerns on Arguello Boulevard and make the corridor safer for all roadway users.
2. **Travel Choices:** Make transit, walking, bicycling, taxi, ridesharing and carsharing the most attractive and preferred means of travel.
The recommended improvements to Arguello Boulevard will create a safe and comfortable environment for people walking and biking on Arguello Boulevard and will make these modes a more popular and attractive choice on this corridor.
3. **Livability:** Improve the environment and quality of life in San Francisco.
This project will improve access to recreational opportunities in Golden Gate Park.

Prioritization

The project will be funded with NTIP placeholder funds in the Bicycle Safety and Circulation and Pedestrian Safety and Circulation categories.

Environmental

For Paint Work:

Prior to approval of the project for construction, SFMTA will conduct review under the California Environmental Protection Act (CEQA). SFMTA shall not proceed with the approval of the project for construction until there has been complete compliance with CEQA. Prior to billing for any construction funds, if requested by the Transportation Authority, the SFMTA will provide the Authority with documentation confirming that CEQA review has been completed.

For DPW Design Work:

The scope of work for which funding is being requested is not considered a project or is otherwise exempt from environmental review.

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

Prior to approval of the project for construction, SFMTA will conduct review under the California Environmental Protection Act (CEQA). SFMTA shall not proceed with the approval of the project for construction until there has been complete compliance with CEQA. Prior to billing for any construction funds, if requested by the Transportation Authority, the SFMTA will provide the Authority with documentation confirming that CEQA review has been completed.

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

FY 2015/16

Project Name: Arguello Boulevard Near-term Improvements [NTIP Capital]

Implementing Agency: San Francisco Municipal Transportation Agency

ENVIRONMENTAL CLEARANCE

Type : Categorically Exempt

Status: Pending Completion by 6/1/16

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	4	2014/2015	3	2015/2016
Environmental Studies (PA&ED)	3	2015/2016	4	2015/2016
R/W Activities/Acquisition				
Design Engineering (PS&E)	4	2015/2016	1	2016/2017
Prepare Bid Documents				
Advertise Construction				
Start Construction (e.g., Award Contract)	1	FY 2016/17		
Procurement (e.g. rolling stock)				
Project Completion (i.e., Open for Use)			1	2016/2017
Project Closeout (i.e., final expenses incurred)			2	2016/2017

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.

MILESTONES	
Work orders for paint upgrade	June 2016
Grind and restripe Arguello Boulevard	July/August 2016
Project Closeout	December 2016

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

FY 2015/16

Project Name: Arguello Boulevard Near-term Improvements [NTIP Capital]

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				
Environmental Studies (PA&ED)				
Design Engineering (PS&E)	Yes	\$10,520	\$10,520	
R/W Activities/Acquisition				
Construction	Yes	\$ 188,931	\$ 188,931	
Procurement (e.g. rolling stock)				
		\$199,451	\$199,451	\$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		
Environmental Studies (PA&ED)		
Design Engineering (PS&E)	\$ 10,520	SFPW design fee proposals
R/W Activities/Acquisition		
Construction	\$ 188,931	SFMTA Engineer cost estimate
Procurement (e.g. rolling stock)		
Total:	\$ 199,451	

% 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.

Summary

Task	Agency	COST
Construction Cost - Grinding	SFPW	\$38,212
Construction Cost - Striping	SFPW	\$115,269
Signs and Meters	SFMTA	\$14,750
Construction Management and Support	SFMTA	\$20,200
Subtotal of Implementation		\$188,431
Detailed Design of concrete upgrades	SFPW	\$10,520
Subtotal of Implementation and Design		\$198,951
City Attorney Fees	City Attorney	\$500
TOTAL		\$199,451

CONSTRUCTION PHASE

CONSTRUCTION COSTS - GRINDING

Agency: SFPW

Project: Arguello Boulevard

Computed by: C.Beck

ITEM #	DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	EXTENSION
1	12" Crosswalk Lines / Stop Bars	189	Lin Ft	\$6.39	\$1,208
2	4" Broken White or Yellow	417	Lin Ft	\$1.82	\$759
3	4" Solid White or Yellow	920	Lin Ft	\$3.20	\$2,944
4	6" Broken White	845	Lin Ft	\$2.63	\$2,222
5	6" Solid White	925	Lin Ft	\$4.00	\$3,700
6	8" Broken White or Yellow	1026	Lin Ft	\$3.60	\$3,694
7	8" Solid White or Yellow	880	Lin Ft	\$4.69	\$4,127
8	Double Yellow	1900	Lin Ft	\$6.27	\$11,913
9	Messages (see page 2)	210	Sq Ft	\$6.08	\$1,277

Labor: \$30,570

Total:

\$31,844

Mat'ls: \$7,642

Added 20% Contingency =

\$38,212

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

CONSTRUCTION COSTS - STRIPING

Agency: SFPW

Project: Arguello Boulevard

Computed by: C.Beck

ITEM #	DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	EXTENSION
1	12" Crosswalk Lines / Stop Bars	181	Lin Ft	\$6.39	\$1,157
2	4" Broken White or Yellow	312	Lin Ft	\$1.82	\$568
3	4" Solid White or Yellow	636	Lin Ft	\$3.20	\$2,035
4	6" Broken White	1400	Lin Ft	\$2.63	\$3,682
5	6" Solid White	5715	Lin Ft	\$4.00	\$22,860
6	8" Broken White or Yellow	80	Lin Ft	\$3.60	\$288
7	8" Solid White or Yellow	56	Lin Ft	\$4.69	\$263
8	Double Yellow	1800	Lin Ft	\$6.27	\$11,286
9	Raised Pavement Markers (White or Yellow)	197	Each	\$14.66	\$2,886
10	Messages (see page 2)	1035	Sq Ft	\$6.08	\$6,293
11	Bus Zones	360	Lin Ft	\$7.76	\$2,794
12	Color Curb Painting	900	Lin Ft	\$10.21	\$9,189
13	Staggered Yellow/White Continental Crosswalks (see page 3)		Lump Sum	-	\$27,638
14	Green Sharrow Backing - thermoplastic	320	Sq Ft	\$16.00	\$5,120

Total: \$96,058

Added 20% Contingency = **\$115,269****PAINT AND SIGN COSTS**

Agency: SFMTA

Project: Arguello Boulevard

Computed by: C.Beck

ITEM #	DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	EXTENSION
1	Meter Change/Modification	8	Each	\$250.00	\$2,000
2	Safe Hit post	40	Each	\$100.00	\$4,000
3	Sign Installation	35	Each	\$250.00	\$8,750

TOTAL **\$14,750** includes contingency**CONSTRUCTION MANAGEMENT AND SUPPORT**

Agency: SFMTA

Source: FY 2016 Salaries with FY 2015 Overhead Approved Rate v2

Class	Job Class Title	FY16 Salary per FTE	FY16 Mandatory Fringe Benefits per FTE	Approved Rate (FY 2015)	Overhead	Salary + Fringe + O/H	Hourly Rate	Hours	Cost
5203	Assistant Engineer	\$103,246	\$58,644	0.901	\$145,863	\$307,753	\$147.96	40	\$5,918
5207	Associate Engineer	\$120,085	\$65,513	0.901	\$167,225	\$352,824	\$169.63	10	\$1,696
5288	Transit Planner II	\$91,799	\$53,574	0.901	\$130,981	\$276,354	\$132.86	20	\$2,657
5289	Transit Planner III	\$108,942	\$60,633	0.901	\$152,787	\$322,362	\$154.98	50	\$7,749
5290	Transit Planner IV	\$129,182	\$69,498	0.901	\$179,011	\$377,691	\$181.58	12	\$2,179

TOTAL **\$20,200****DETAILED DESIGN COSTS**

Agency: SFDPPW

Job Class Title	Hours	Hourly Fully Burd.	Cost
Assistant Engineer / 5203	66	\$134.06	\$8,848
Division Manager: Senior Engineer/5211	8	\$209.14	\$1,673
SFDPPW Labor Subtotal	74		\$10,521

CITY ATTORNEY FEES

Agency: Sf City Attorney

Job Class Title	Hourly Rate	Hours	Cost
City Attorney	\$250	2	\$500
TOTAL			\$500

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

FY 2015/16

Project Name: Arguello Boulevard Near-term Improvements [NTIP Capital]

FUNDING PLAN - FOR CURRENT PROP K REQUEST

Prop K Funds Requested: \$199,451

5-Year Prioritization Program Amount: see below (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 to the subject project in the NTIP Placeholder line in the Bicycle Circulation and Safety 5YPP (\$336,000) and the NTIP Placeholder line in the Pedestrian Circulation and Safety 5YPP (\$1,522,000).

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	\$199,451			\$199,451
				\$0
				\$0
				\$0
Total:	\$199,451	\$0	\$0	\$199,451

Actual Prop K Leveraging - This Phase: 0.00%
 Expected Prop K Leveraging per Expenditure Plan: N/A

\$199,451
 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
				\$0
Total:	\$0	\$0	\$0	\$0

Actual Prop K Leveraging - Entire Project:	#DIV/0!	\$ 199,451
Expected Prop K Leveraging per Expenditure Plan:	N/A	Total from Cost worksheet
Actual Prop AA Leveraging - Entire Project:	NA	

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: \$199,451

Sponsor Request - Proposed Prop K Cash Flow Distribution Schedule			
Fiscal Year	Cash Flow	% Reimbursed Annually	Balance
FY 2015/16	\$199,451	100.00%	\$0
		0.00%	\$0
		0.00%	\$0
		0.00%	\$0
		0.00%	\$0
Total:	\$199,451		

Prop AA Funds Requested: \$0

Sponsor Request - Proposed Prop AA Cash Flow Distribution Schedule			
Fiscal Year	Cash Flow	% Reimbursed Annually	Balance
		#DIV/0!	\$199,451
		#DIV/0!	\$199,451
		#DIV/0!	\$199,451
Total:	\$0		

**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	\$188,931	
Prop K Allocation	\$10,520	Design Engineering (PS&E)	
Total:	\$199,451		

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

A multi-phase allocation is recommended as the work represents two distinct scopes of work with independent utility (e.g. design of concrete bulbs and construction of near-term striping work).

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

Source	Fiscal Year	Maximum Reimbursement	% Reimbursable	Balance
Prop K EP 39	FY 2016/17	\$188,931	95.00%	\$10,520
Prop K EP 40	FY 2016/17	\$10,520	5.00%	\$0
			0.00%	\$0
			0.00%	\$0
			0.00%	\$0
Total:		\$199,451	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 39	FY 2016/17	Construction	\$188,931	95%	\$10,520
Prop K EP 40	FY 2016/17	Design Engineering (PS&E)	\$10,520	100%	\$0
				100%	\$0
				100%	\$0
Total:			\$199,451		

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:	Allocate	\$78,696	FY 2016/17	Construction

Trigger:

Deliverables:

1.
2.
3.

Special Conditions:

1.
2.
3.

Notes:

1.
2.

Supervisorial District(s):

Prop K proportion of expenditures - this phase:	100.00%
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 39	FY 2016/17	Construction	\$188,931	95%	\$10,520
				95%	\$10,520
Total:			\$188,931		

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

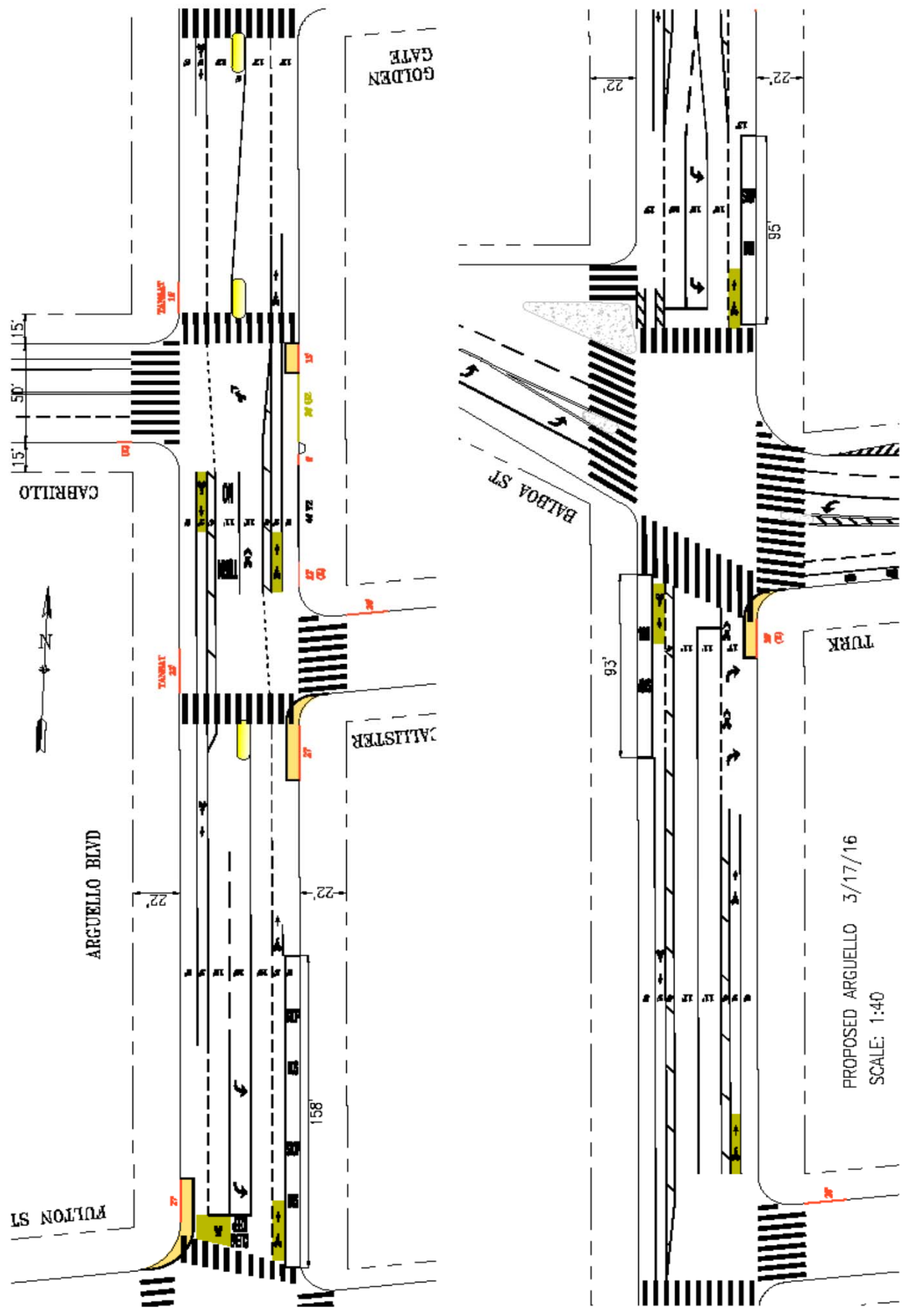
Cash Flow Distribution Schedule by Fiscal Year & Phase (for entire allocation/appropriation)

Source	Fiscal Year	Phase	Maximum Reimbursement	Cumulative % Reimbursable	Balance
Prop K EP 40	FY 2016/17	Design Engineering (PS&E)	\$10,520	100%	\$0
				100%	\$0
Total:			\$10,520		

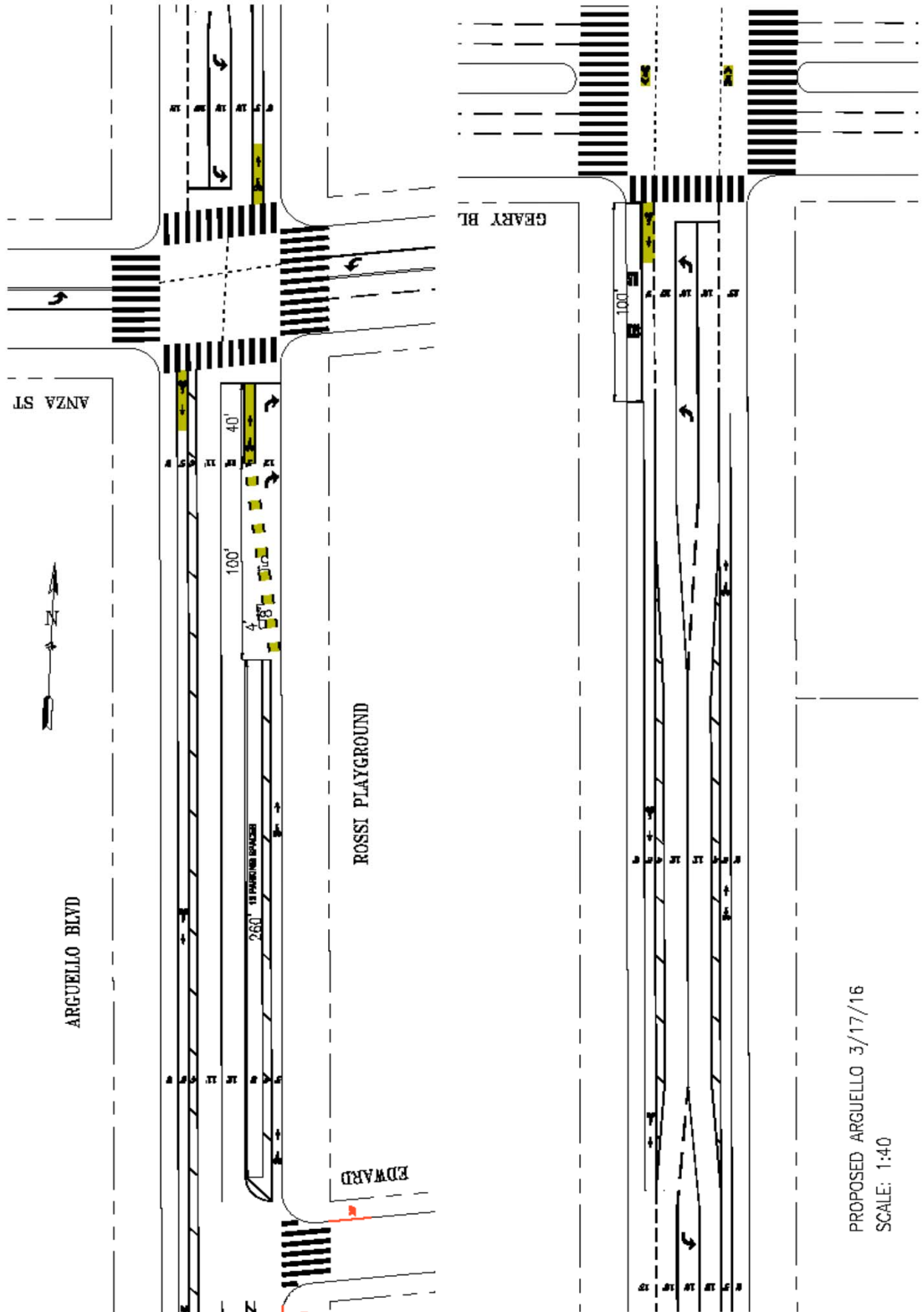
MAPS AND DRAWINGS



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

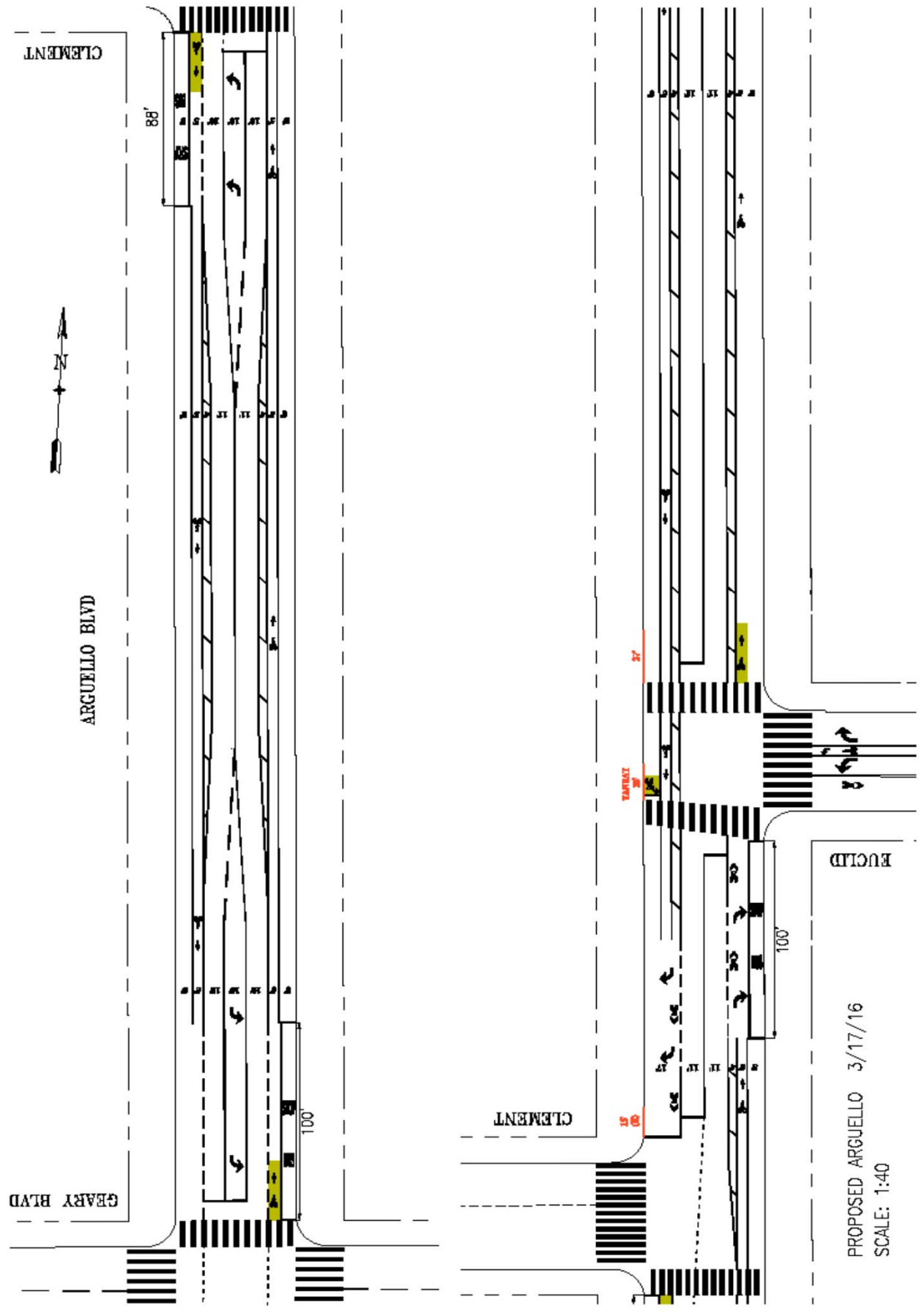


San Francisco County Transportation Authority
Prop K/Prop AA Allocation Request Form



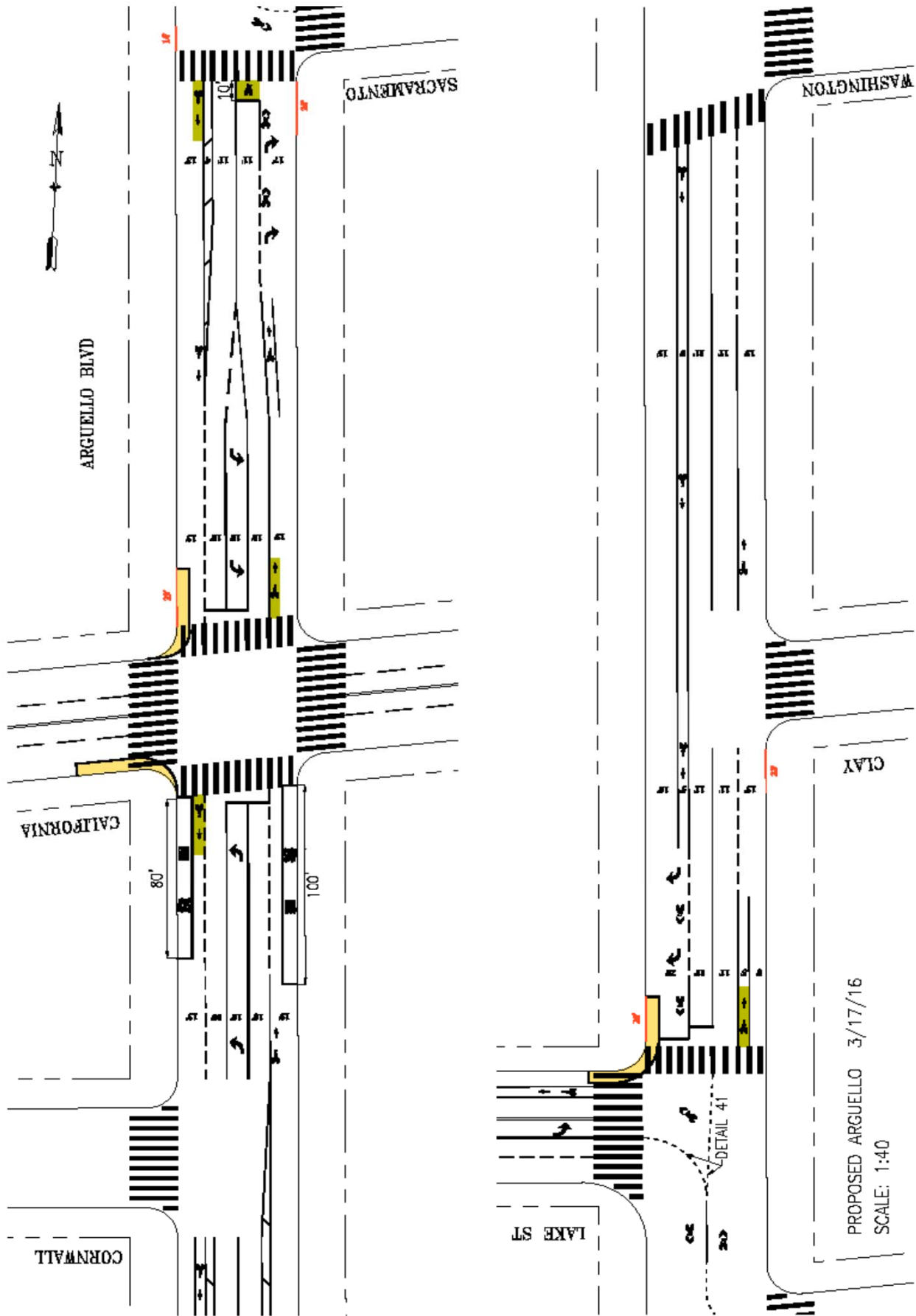
PROPOSED ARGUELLO 3/17/16
SCALE: 1:40

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



PROPOSED ARGUELLO 3/17/16
SCALE: 1:40

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



PROPOSED ARGUELLO 3/17/16
SCALE: 1:40

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

Arguello Boulevard Safety Project – Paving Coordination

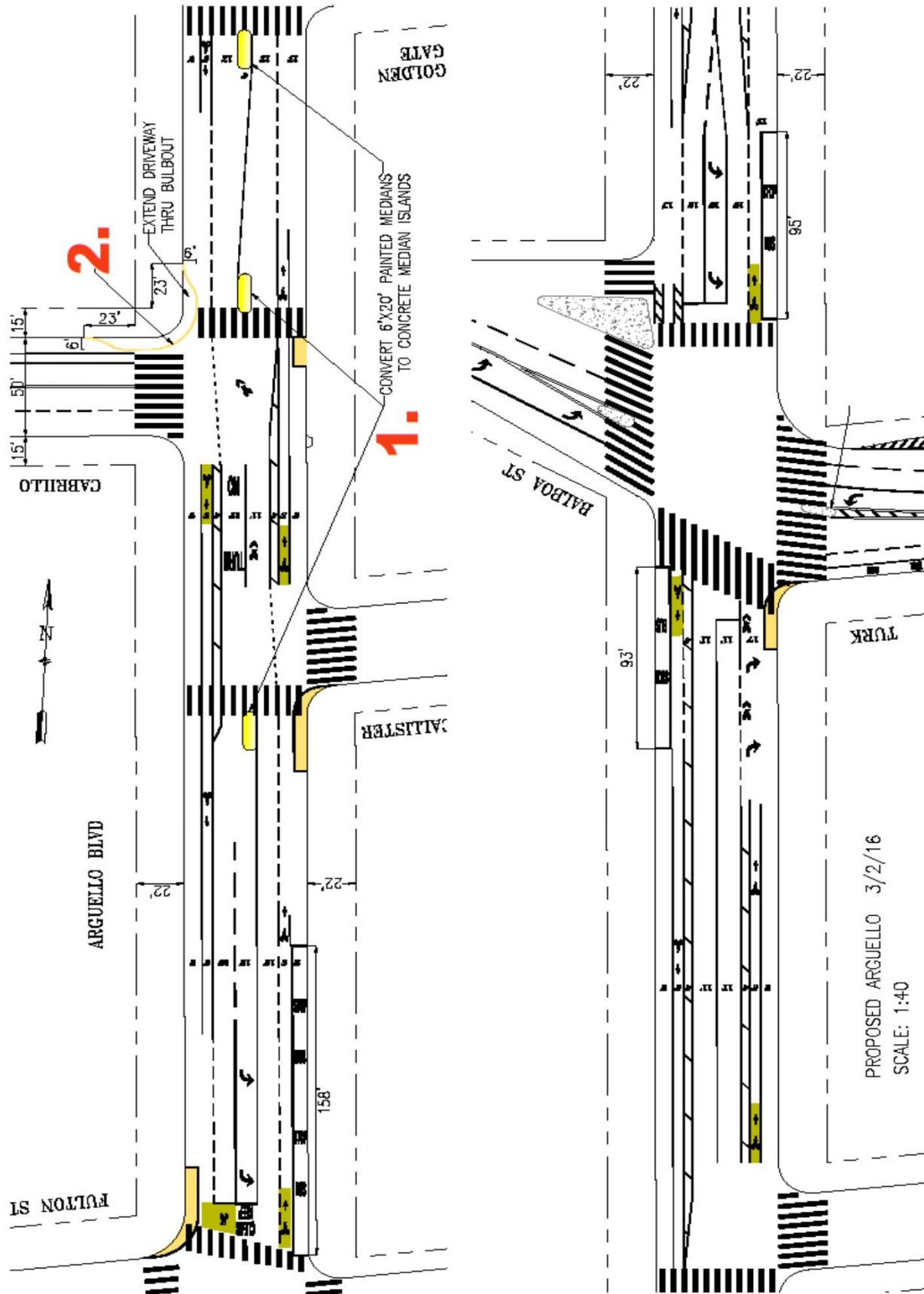
The below improvements are concrete bulbouts and islands that the SFMTA is seeking to have SFPW design and construct as part of their 2017 paving project. These measures address safety concerns that were identified by the community for people walking across Arguello Boulevard at Cabrillo Street.

The March 2016 NTIP Capital funding request will include \$30,000 to send to DPW to design these concrete traffic calming measures along with their design activities for the 2017 paving project.

Concrete Island and Bulb-outs:

1. McAllister, Cabrillo, and Golden Gate Islands
 - Convert 3 painted islands to concrete islands with 6" raised curbs (at McAllister Street, Cabrillo Street, and Golden Gate Avenue)
 - Make design changes to islands where necessary to apply with SF Accessibility guidelines
2. Cabrillo Street pedestrian bulb-out
 - Install a wraparound bulb-out in conjunction with Public Works curb ramp/paving work
 - This location was identified by the community for safety concerns and this bulbout will address key crossing locations of Cabrillo/Arguello

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: \$ 199,451
Current Prop AA Request: \$ -

Project Name: Arguello Boulevard Near-term Improvements [NTIP Capital]

Implementing Agency: San Francisco Municipal Transportation Agency

Project Manager

Grants Section Contact

Name (typed): Charlie Ream

Joel Goldberg

Title: Planner, Livable Streets

Manager,
Capital Procurement & Mgmt

Phone: 415-701-4695

415-701-4499

Fax: _____

Email: charlie.ream@sfmta.com

joel.goldberg@sfmta.com

Address: 1 South Van Ness, 7th FL, San Francisco, CA 94103

1 South Van Ness, 8th FL, San Francisco, CA 94103

Signature: _____

Date: _____



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Memorandum

Date: 05.12.16 **RE:** Plans and Programs Committee
May 17, 2016

To: Plans and Programs Committee: Commissioners Tang (Chair), Farrell (Vice Chair), Avalos, Breed, Peskin and Wiener (Ex Officio)

From: Eric Cordoba – Deputy Director for Capital Projects 

Through: Tilly Chang – Executive Director 

Subject: **INFORMATION** – Major Capital Projects Update – Muni Radio Replacement Project

Summary

The San Francisco Municipal Transportation Agency (SFMTA) has embarked on a project to replace and modernize its radio communications system, some elements of which date back to the 1970s. The Muni Radio Replacement Project will do much more than its name implies. It will integrate Muni's communications with Intelligent Transportation Systems components; incorporate up-to-date technological features such as expanded data transmission and simulcasting; and integrate multiple vehicle information systems. By replacing antiquated systems, the SFMTA will be able to improve transit operations and reliability across all modes of service. With a contribution of \$61.7 million, Prop K sales tax is the largest funding source for the \$128 million project. In June 2012, the SFMTA issued the notice-to-proceed to Harris Corp, the design-build contractor and sole bidder. We are pleased to report that construction, testing and configuration is nearing completion at the radio base stations. Construction is also taking place at 16 aboveground locations and the Metro subway system. Four above ground radio base stations have been completed and are on-the-air. All base stations are in the system setup and configuration stage. The antenna cable installation in the Metro tunnel has been 99% completed. Work is also underway at the subway stations and the above-ground yard and central control facility installations. The SFMTA estimates that the installation of the full rubber-tire fleet will be completed by September 2016. For the new LRVs, factory testing is scheduled for June 2016 and installation will take place from September 2016 to January 2017. The original contract schedule called for construction to be completed in September 2015 and had a budget of \$116.4 million. However, schedule delays and difficulties experienced by the contractor (e.g. ensuring compatibility with all five Muni modes, staffing issues) have contributed to a budget increase to \$128.0 million and a Final Switchover anticipated in March 2017.

BACKGROUND

The San Francisco Municipal Transportation Agency (SFMTA) has embarked on a project to replace and modernize its radio communications system, some elements of which date back to the 1970s. The Muni Radio Replacement Project will do much more than its name implies. The new communications system will be an Intelligent Transportation System and will incorporate up-to-date technological features such as expanded data transmission and simulcasting in addition to providing voice communication. It will integrate multiple vehicle information systems, including: the Vehicle Logic Unit, Automated Vehicle Location, Wireless Local Network, Digital Vehicle Announcement System, Automated Passenger Counting, Fare Collection, Vehicle Health Monitoring, Computer-Aided Dispatch, Mobile Dispatch,

Reporting System, and Traveler Information. By replacing antiquated systems, some of which are forty years old, SFMTA will be able to improve transit operations and reliability across all modes of service.

DISCUSSION

Project Status: Following extended negotiations with the single bidder, on June 20, 2012 the SFMTA issued notice-to-proceed (NTP) to Harris Corp, the design-build contractor for the project. As of February 2016, construction, testing and configuration is nearing completion at the radio base stations. Construction is also taking place at 16 aboveground locations and the Metro subway system. Four above-ground radio base stations have been completed and are on-the-air. All base stations are in the system setup and configuration stage. The antenna cable installation in the Metro tunnel has been 99% completed and work is underway at the subway stations and the above-ground yard and central control facility installations.

Having completed factory acceptance testing for the rubber-tire fleet, the contractor completed installation on nine revenue buses and two non-revenue vehicles as the First-of-the-Kind radio installations. The contractor is conducting system-wide setup and configuration, and dry-run testing using the First-of-the-Kind vehicles. Next project milestone is Mini-fleet testing, which is scheduled for May 2016. MTA estimates that the installation of the full rubber-tire fleet will be completed by September 2016. For the LRVs, factory testing is scheduled for June 2016 and installation will take place from September 2016 to January 2017. It will be followed by the historic fleet on-board installation, which will take place between January and March of 2017. Last fall, SFMTA started its training program with the bus operators and central dispatchers.

Budget and Cost: On April 17, 2012 the SFMTA board authorized the award of a design-build contract to Harris Corporation in the amount of \$105,152,343. At the time, the overall project budget was set at \$116,426,667. Subsequently the project has seen a series of cost increases--some due to unforeseen conditions and some due to scope changes--resulting in a current project budget of \$128,026,740 in year-of-expenditure dollars, an increase of \$11.6 million over the 2012 budget.

Federal	
FTA and FHWA	\$22,194,927
State	
Prop 1B I-Bond	\$26,000,268
Local	
Prop K	\$61,757,410
AB664 Bridge Tolls	\$554,878
SFMTA Revenue Bonds	\$13,710,000
SFMTA operating Fund	\$3,809,257
TOTAL	\$128,026,740

Conceptual Engineering	\$4,380,347
Final Design	\$6,736,977
Construction	\$116,909,416
TOTAL	\$128,026,740

The increase covers all the changes to the project from inception to date, which include: moving the South Hill Base Station to Bayview Park Base station, addition of mobile radio terminals to the historic fleet, modification of automatic passenger counters, providing GPS data to onboard video recorders, structural retrofit of the Twin Peaks tower, equipping newly acquired buses with new system, and executing an option for a three-year support program. In addition, the budget increase replenished the project contingency to a 5% level, which is appropriate for a project at this stage of completion. As of February 29, 2016, the project has incurred \$24,586,000 in costs.

Funding: With a contribution of \$61,757,410, Prop K is the largest funding source of the project. Funds were allocated to the project in 2007 and 2009. To date, only \$4,373,566 has been invoiced to the Transportation Authority. This is due to a combination of factors including delays in delivering the project, the fact that the contract payment structure is based on reaching a series of project milestones and the contractor has had difficulties meeting those dates, and that the SFMTA has been billing other fund sources with timely-use-of-funds requirements first (a practice which we support as it helps to keep Prop K financing costs low).

The current funding plan is shown in Table 2 on the previous page. As shown therein, the SFMTA Revenue Bond contribution has been increased to \$13,710,000 from \$4,710,000 to account for the \$11.6 million increase in forecasted project cost.

Schedule: The project is 18 months late from the original contract schedule. The original schedule called for the project to be completed in September 2015, but has suffered a series of setbacks. Progress has been delayed by Muni's mixed modes of operation and a unique fleet of revenue vehicles that include historic rail cars, cable cars, light rail, trolley buses, and diesel buses. The radio vendor had to develop customized solutions for each, which was very challenging resulting in delays to the system's design and development. In addition, the contractor experienced an exodus of key staff resources to other technology companies in the Bay Area. Final switchover to the new system is now scheduled to take place in March 2017. A revised list of major milestones for the project is shown in Table 3.

Table 3 – Muni Radio Replacement Project Major Milestones (Revised)	
Notice -to- Proceed to Design-Build Contractor	Jun 2012
Complete Design	Jun 2014
Complete Pilot Testing	May 2016
Construction/Installation Complete	March 2017
Final Switchover	March 2017

DBE/SBE Program: The Radio Replacement project has a small business enterprise (SBE) goal of 15% of construction work. To date, there has been an SBE participation of 32% of the billings.

Challenges: The current in-service date of the project is March 2017, 18 months later than originally anticipated. This delay has affected the final move in and transfer of operations to the recently built Transportation Management Center. In order to meet that schedule, Harris must successfully complete all the system testing in May 2016 and be ready for starting the bus installation on June 1, 2016.

ALTERNATIVES

None. This is an information item.

FINANCIAL IMPACTS

None. This is an information item.

RECOMMENDATION

None. This is an information item.



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SFMTA
Municipal
Transportation
Agency

Bicycle Strategy Implementation

Jamie Parks
May 17, 2016

SFMTA Strategic Plan

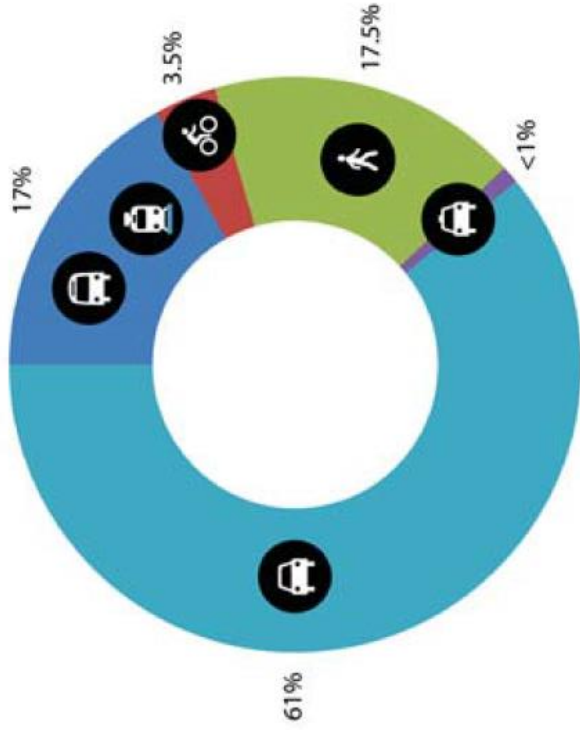
- Agency-wide direction and guidance



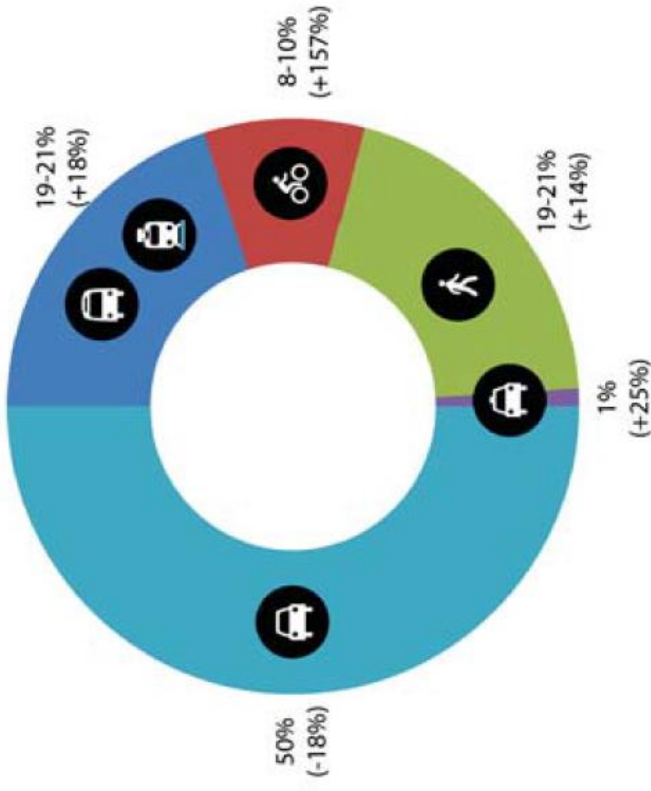
Strategic Plan Goals

1. Create a safer transportation experience for everyone.
2. Make transit, walking, bicycling, taxi, ridesharing, and carsharing the preferred means of travel.
3. Improve the environment and quality of life in San Francisco.
4. Create a workplace that delivers outstanding service.

2010 Mode Split

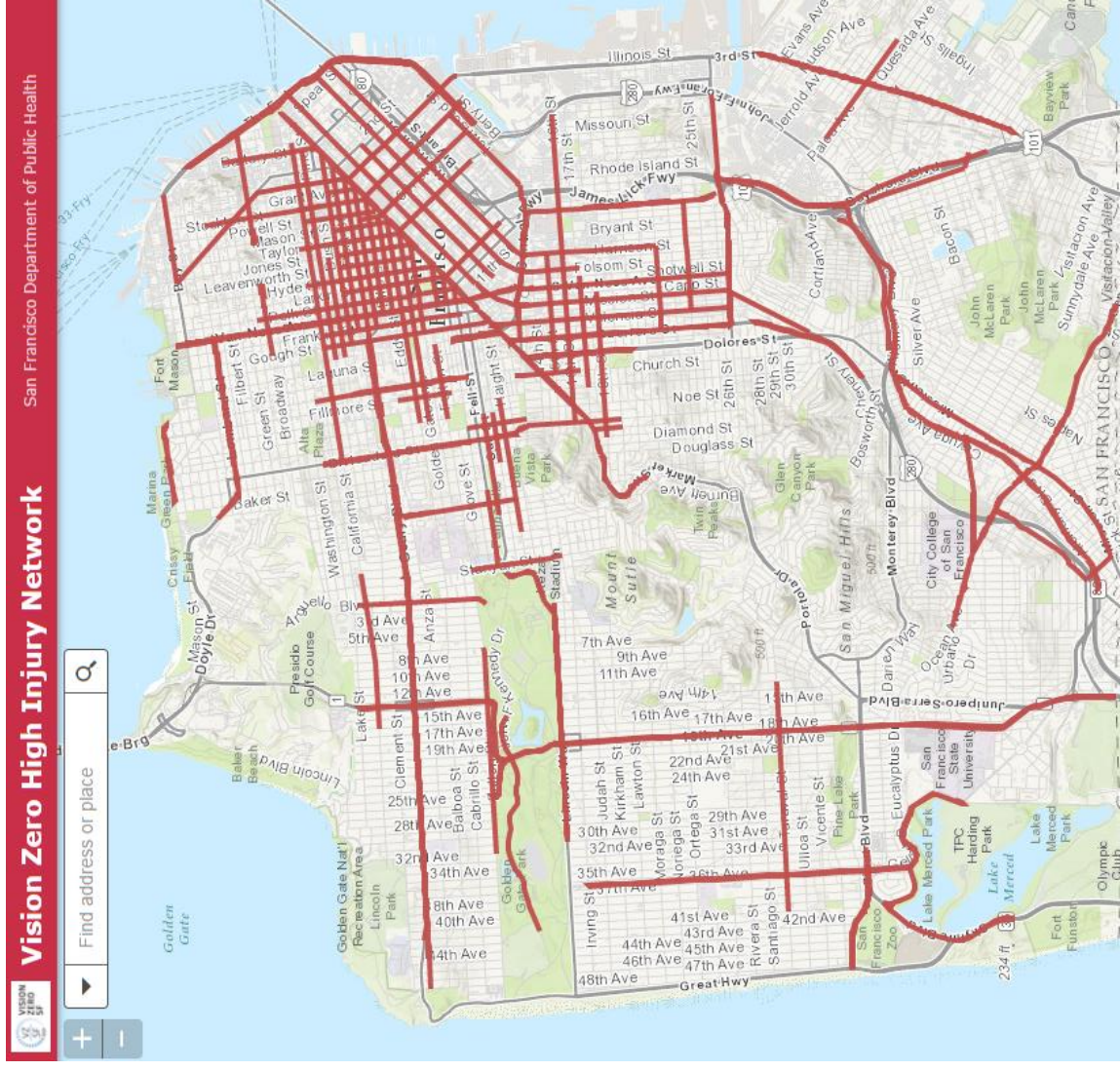


2018 Mode Split Potential



Vision Zero

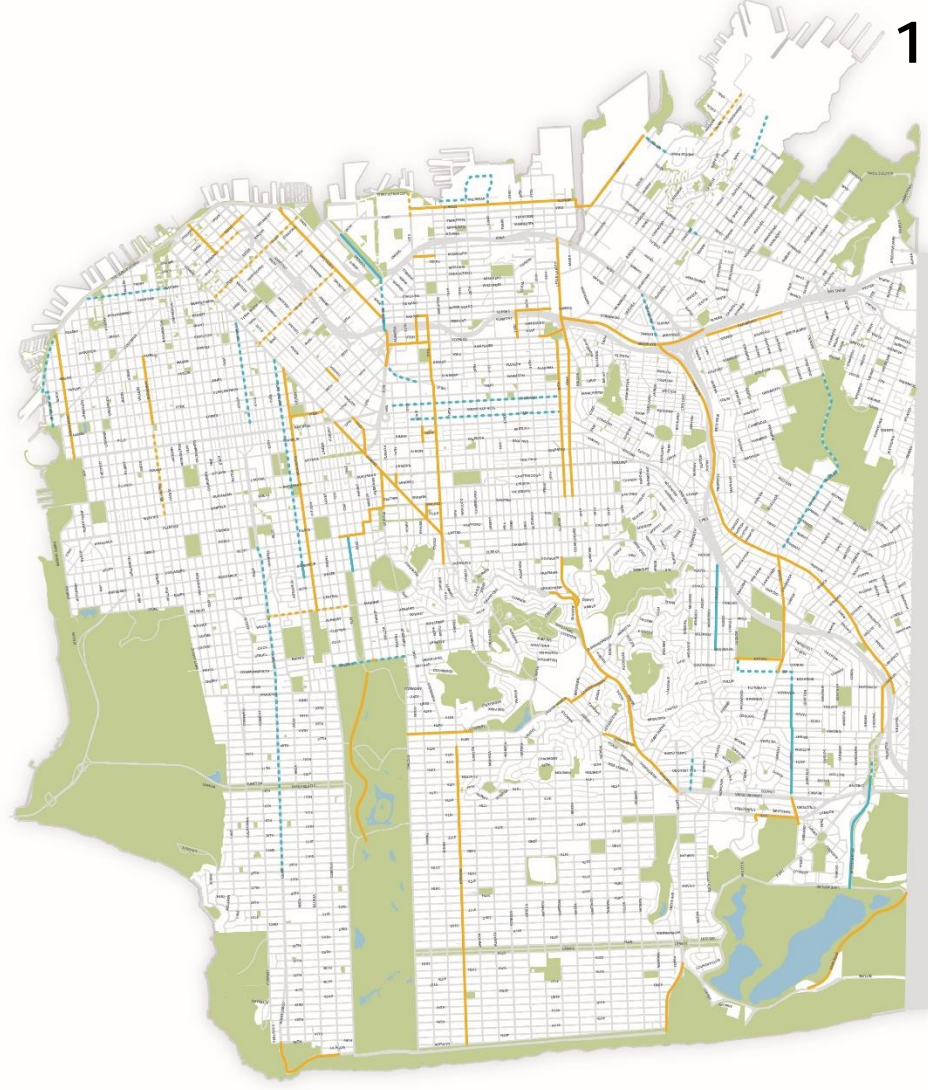
- Eliminate fatalities and serious injuries by 2024
- 70% of severe crashes on 12% of street network



2009 Bike Plan

- 60 short-term projects
 - 95% complete
- >120 bike lane miles

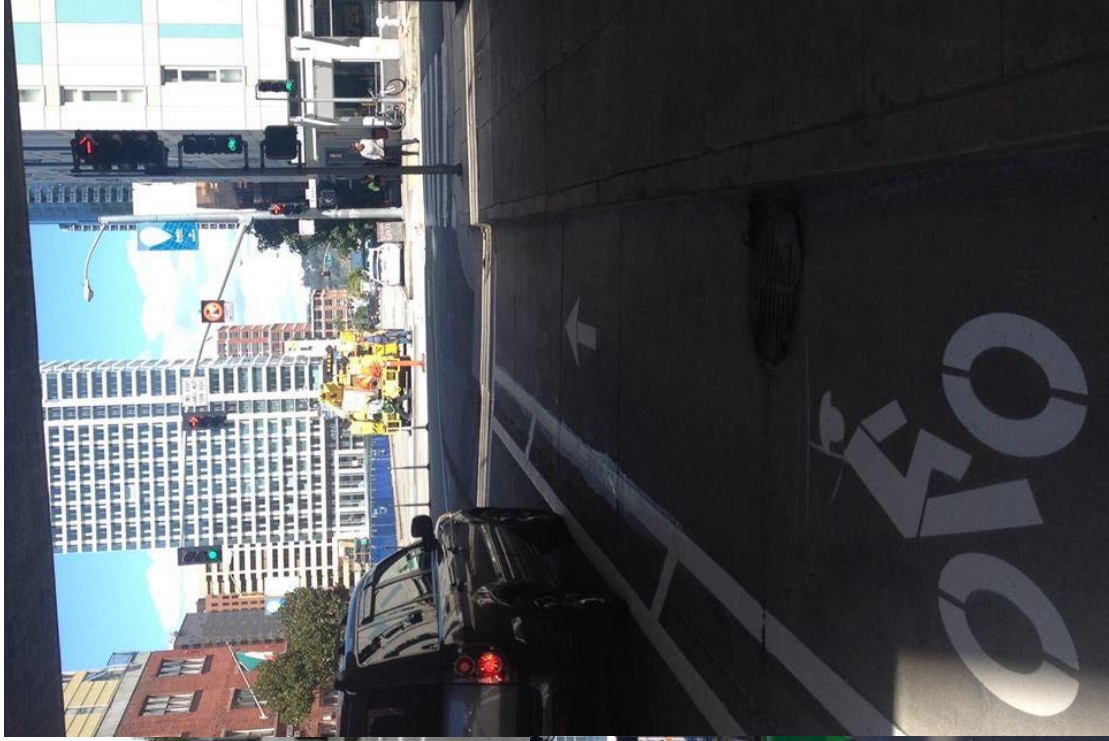
2009 Bicycle Plan Projects



Completed Near-Term
Incomplete Near-Term

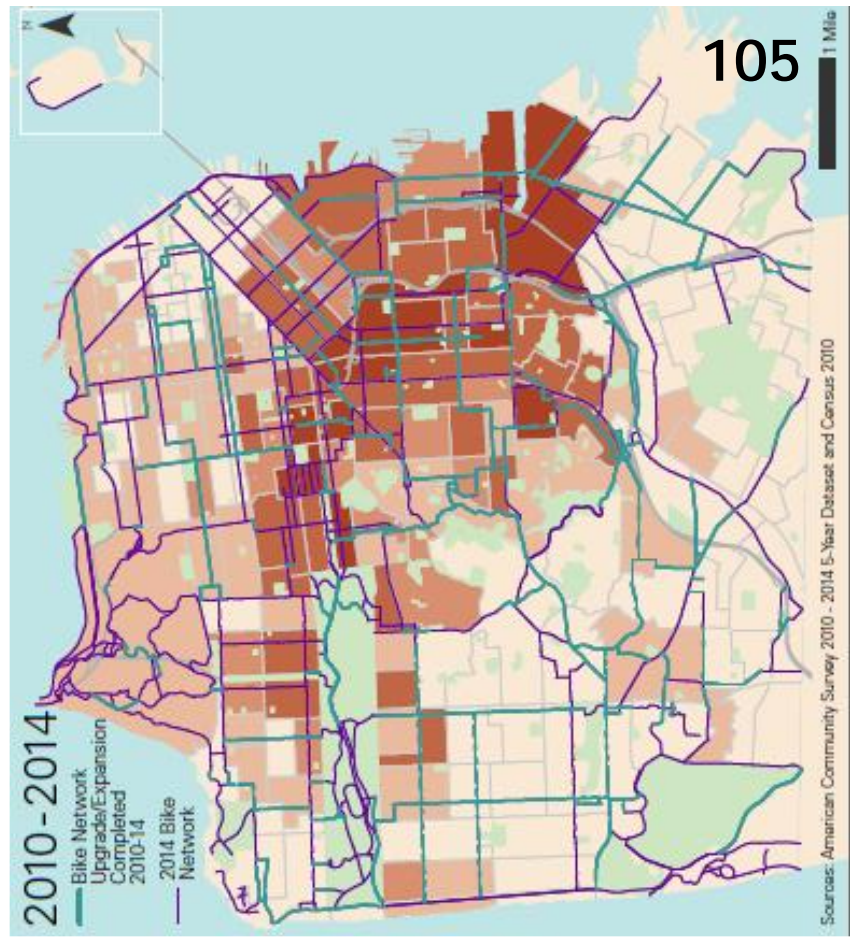
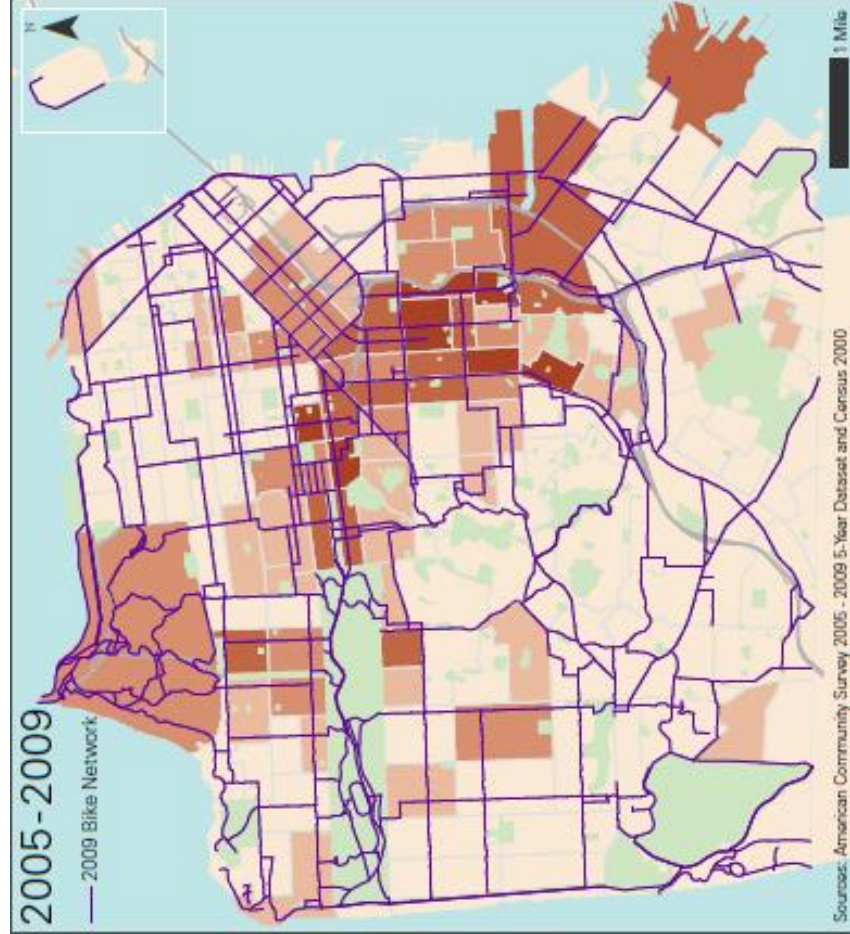
Completed Long-Term
Incomplete Long-Term

Next Generation Facilities



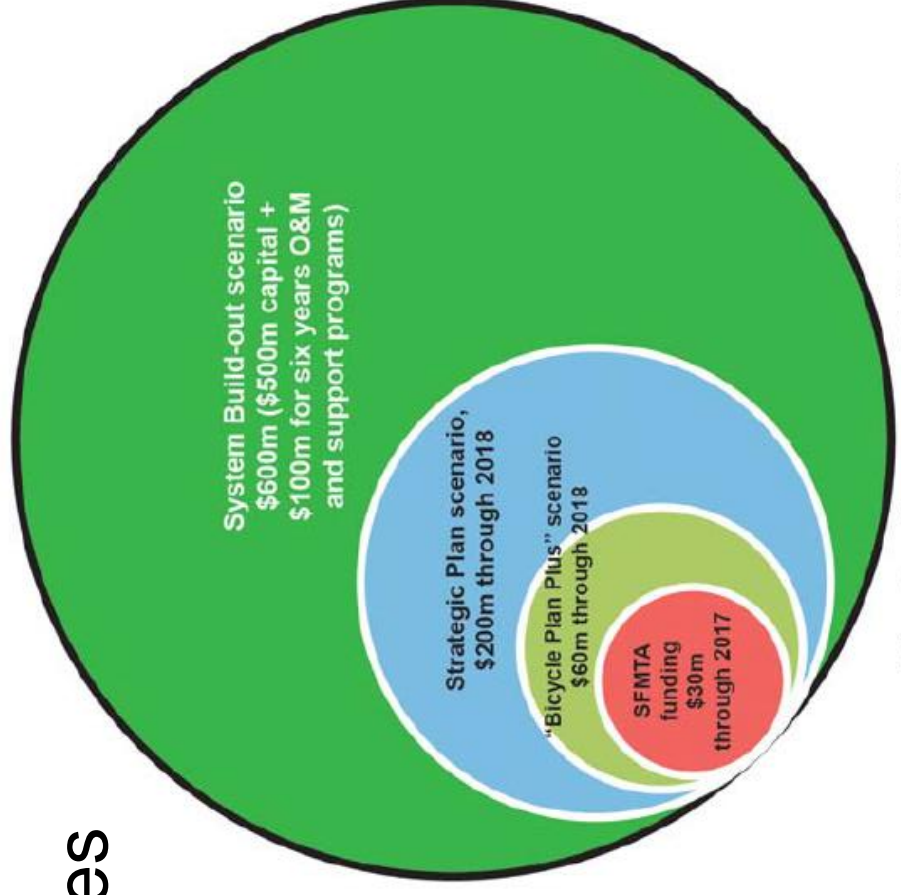
SFMTA Efforts are Succeeding

- 3rd highest bike commute rate in US



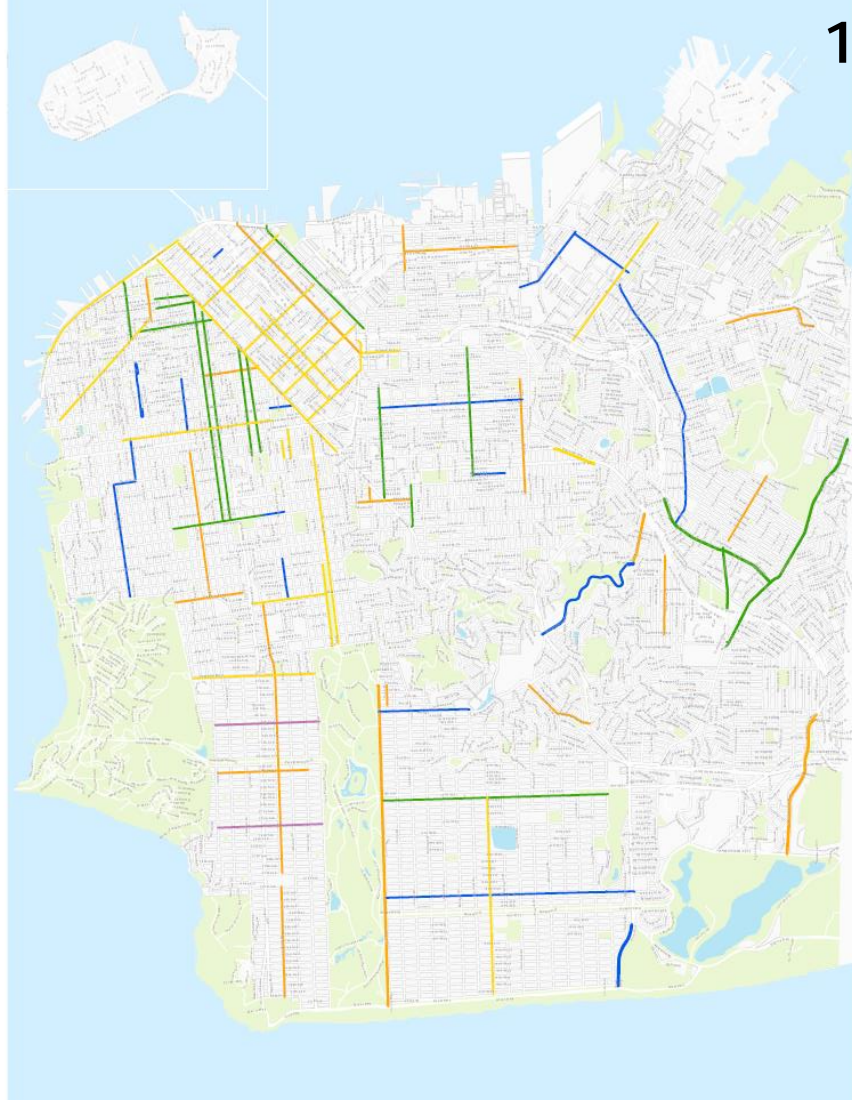
2013 Bicycle Strategy

- What would make SF a world-leader?
 - Community support
 - More protected facilities
 - Funding



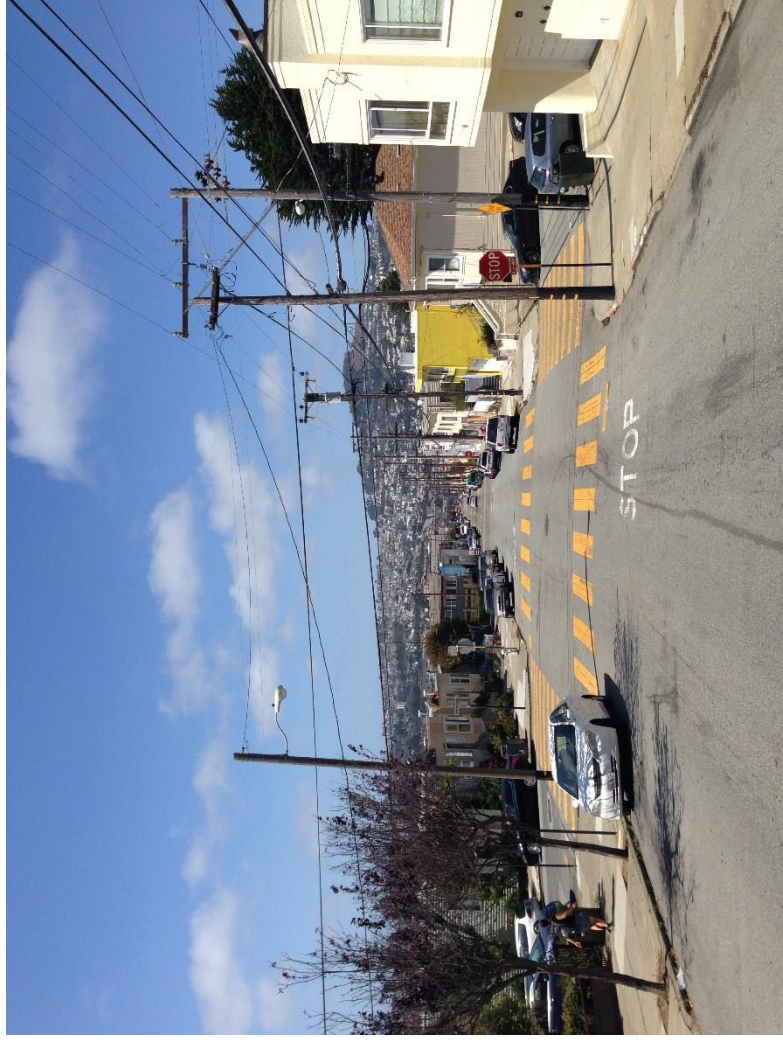
Bicycle Strategy - Network Analysis

- Identifies 69 NEW corridors
- \$200k Prop K allocation in 2015
 - Scoping
 - Begin planning on highest priorities



Bicycle Strategy – Scoping Project

- Field visit and data analysis to determine:
 - Corridor limits
 - Parallel routes
 - Potential facility type(s)
 - Constraints
- Approx. 10 hrs X 69 corridors



Corridor Prioritization

- **Balanced project mix:**
 - **High injury network**
 - Project complexity/type
 - Cost
 - Funding availability
 - Network considerations
- **Direct input to FY17-21 CIP**

Planned Capital Projects

FY17-21 CIP
 ≈20 funded
 projects
 ≈\$90M



SFMTA Bicycle Program

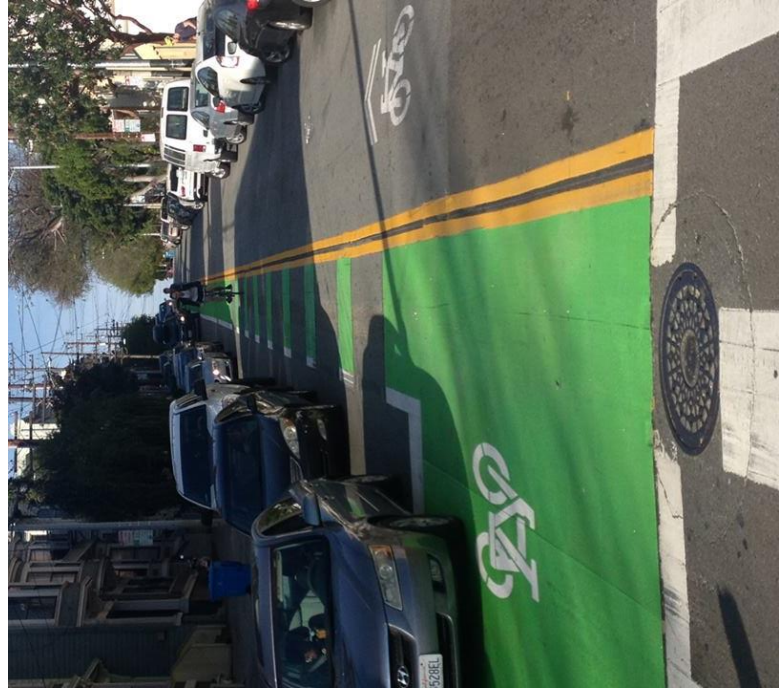
More than just corridor projects

- Spot Improvements
- Bike share
- Bike parking
- Bike wayfinding
- Education and encouragement

Prop K and TFCA provide significant funding

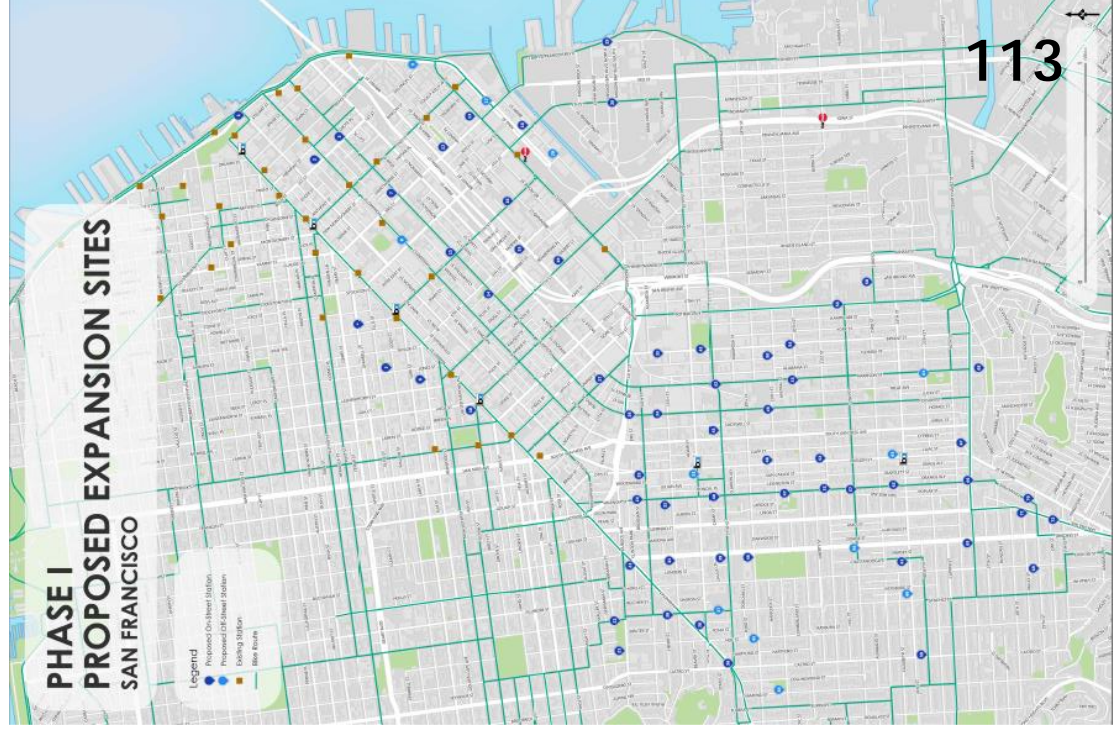
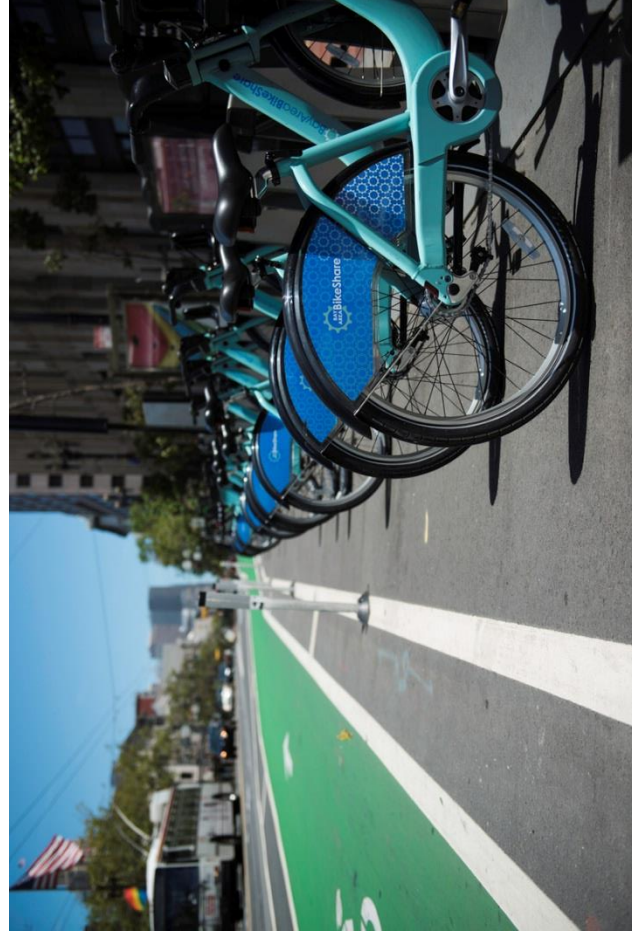
Bike Spot Improvements

- High-impact & low-cost
- Delivered by SFMTA Shops (mostly)



Bike Share

- Pilot system opened in 2013
(≈ 300 bicycles)
- Privately funded expansion
 - 4,500 bikes/300+ stations in SF



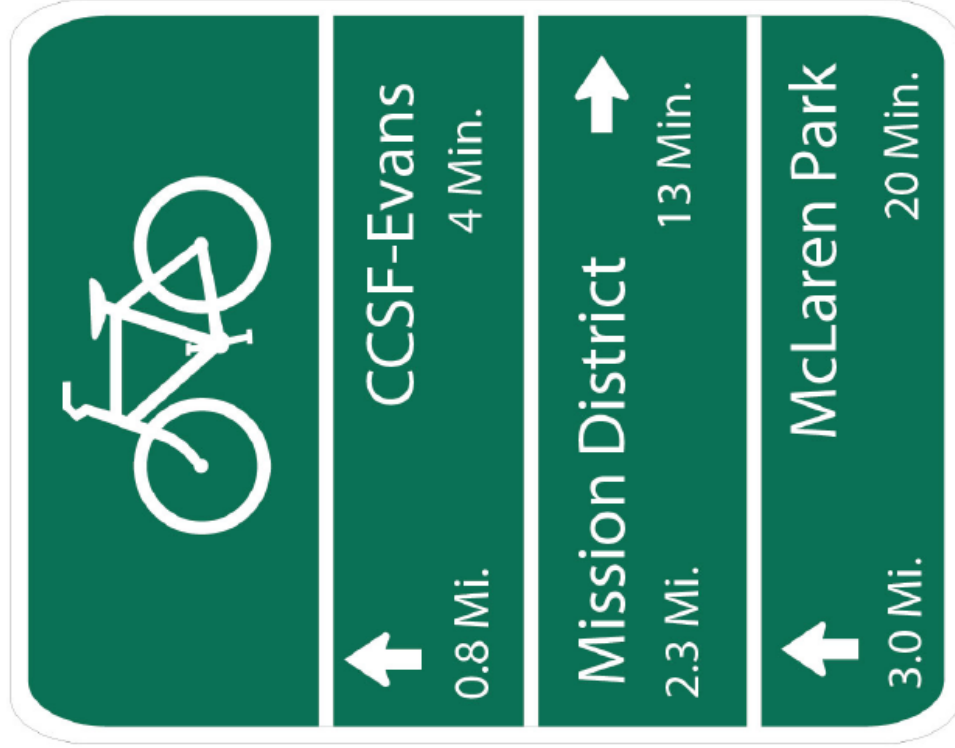
Bike Parking

- Sidewalks racks and corrals by request



Bicycle Wayfinding

This



Not This



Education & Encouragement

- In-school and adult classes
- Bike to Work Day



Questions?

Thank you!



Jamie Parks

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Anticipated 2016 Bicycle Network Improvements

May 12, 2016

SFMTA - Mileage of 2016 Bicycle Network Improvements		by Facility Type	
by Project Type		Separated	Buffered
New*	8.86	6.87	6.13
Upgraded	11.73	1.90	5.69
Total	20.59	1.60	22.19

* excludes sharrows

Street	From	To	Direction	Center-Line Miles	Bike Lane Miles	Existing Facility	Future Facility	New/Upgrade
2016								
10th St	Market	Howard	SB	0.25	0.25	Bike route	Bike lane	New
10th St	Howard	Folsom	SB	0.12	0.12	None	Bike lane	New
13th St	Harrison	Bryant	EB	0.14	0.14	None	Parking protected bikeway	New
2nd St	Mission	Howard	NB	0.12	0.12	Bike route	Green-backed sharrows	New
2nd St	Market	Mission	Both	0.12	0.24	Bike route	Bike lane	New
2nd St	Mission	Howard	SB	0.12	0.12	Bike route	Bike lane	New
2nd St	Howard	King	Both	0.68	1.36	Bike route	Green-backed sharrows	New
2nd St	Market	King	Both	0.91	1.82	Bike lane	Raised cycletrack	Upgrade
Arguello Blvd.	West Pacific	Fulton	Both	1.06	2.12	Bike lane	Buffered bike lane	Upgrade
Bryant	Division	17th	Both	0.35	0.70	None	Bike lane	New
Columbus Ave	Washington	Broadway	Both	0.24	0.48	Bike route	Bike lane	New
Division	10th	9th	Both	0.11	0.22	bike lane	Parking protected bikeway	Upgrade
Division	9th	Vermont	WB	0.07	0.07	bike lane	Buffered bike lane	Upgrade
Folsom St	2nd	1st	EB	0.17	0.17	Bike lane	Buffered or separated bikeway	Upgrade
Guerrero	San Jose	Cesar Chavez	Both	0.18	0.36	Bike lane	Buffered bike lane	Upgrade
Harrison St	15th	16th	NB	0.11	0.11	None	Bike lane	New
Harrison St	16th	17th	SB	0.09	0.09	Bike lane	Buffered bike lane	Upgrade
Harrison St	16th	17th	NB	0.09	0.09	Bike route	Buffered bike lane	New
Mansell St	Dublin	University	Both	0.95	1.90	None	Separated bikeway	New
Market	Duboce	Castro	Both	0.67	1.34	Bike lane	Green bike lane	Upgrade
Market	Octavia	Castro	WB	0.90	0.90	Bike lane	Parking protected bikeway	Upgrade
Masonic	Geary	Fell	Both	0.67	1.34	Bike route	Raised cycletrack	New
Ocean Ave	19th	Sunset	Both	1.03	2.06	bike route	bike lane	New
Polk	Post	McAllister	NB	0.44	0.44	Bike lane	Raised cycletrack	Upgrade
Polk	Post	McAllister	SB	0.44	0.44	Bike lane	Buffered Bike Lane	Upgrade
Polk	Post	Pine	NB	0.18	0.18	Bike route	Raised cycletrack	New
Polk	Pine	Union	NB	0.63	0.63	Bike route	Green-backed sharrows	New
San Jose	Guerrero	Randall	Both	0.39	0.78	Bike lane	Buffered bike lane	Upgrade
San Jose	Randall	Arlington	SB	0.48	0.48	Bike lane	Buffered bike lane	Upgrade
San Jose	Randall	Arlington	NB	0.48	0.48	Bike lane	Separated bikeway	Upgrade
Twin Peaks		Arlington	Both	0.31	0.62	None	Bicycle and pedestrian path	New
Vicente	14th	19th	Both	0.3	0.60	bike route	bike lane	New
Webster	Grove	Sutter	Both	0.65	1.30	Bike lane	Buffered bike lane	Upgrade
Webster	Sutter	Bush	Both	0.06	0.12	None	Buffered bike lane	New

Note that several projects will complete construction in 2017

Plan Bay Area 2040 Update

Plans and Programs Committee
Agenda Item 8



SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY

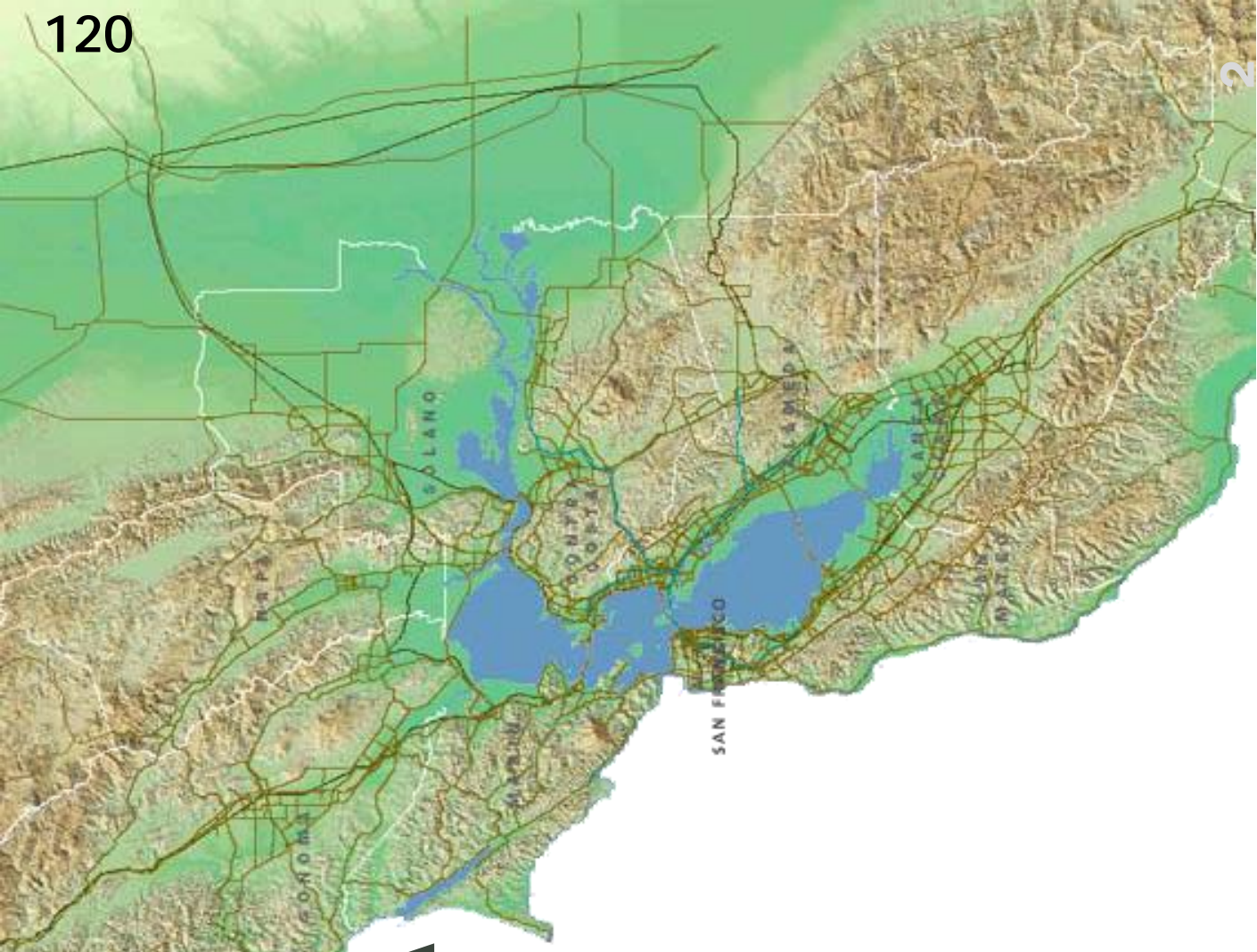
May 17, 2016

Plan Bay Area 2040

PLAN BAY AREA 2040 > SUMMARY

Today's Update:

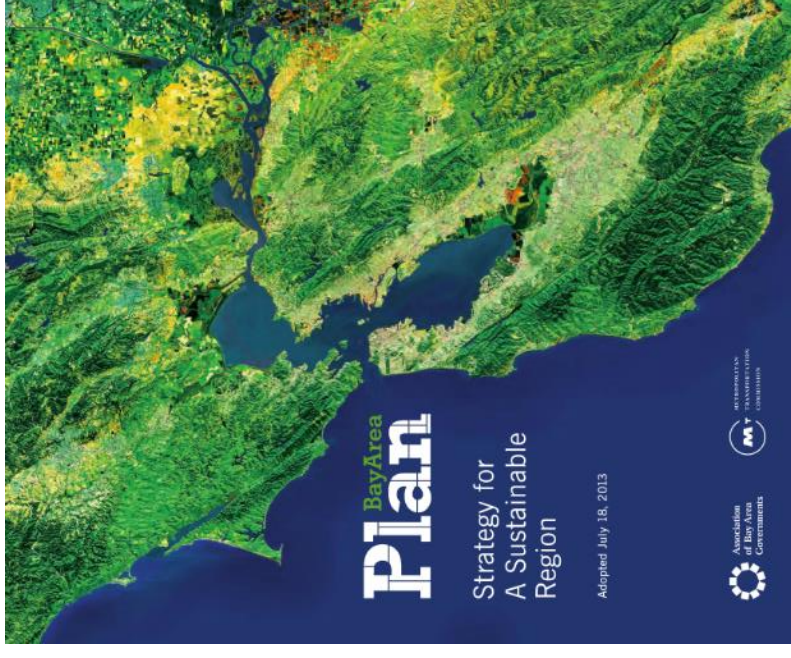
- ▶ **Quick Recap: What's PBA 2040?**
- ▶ **Metropolitan Transportation Commission's (MTC's) project performance evaluation**
- ▶ **MTC's proposal to advance the regional housing action agenda**



What is Plan Bay Area 2040?

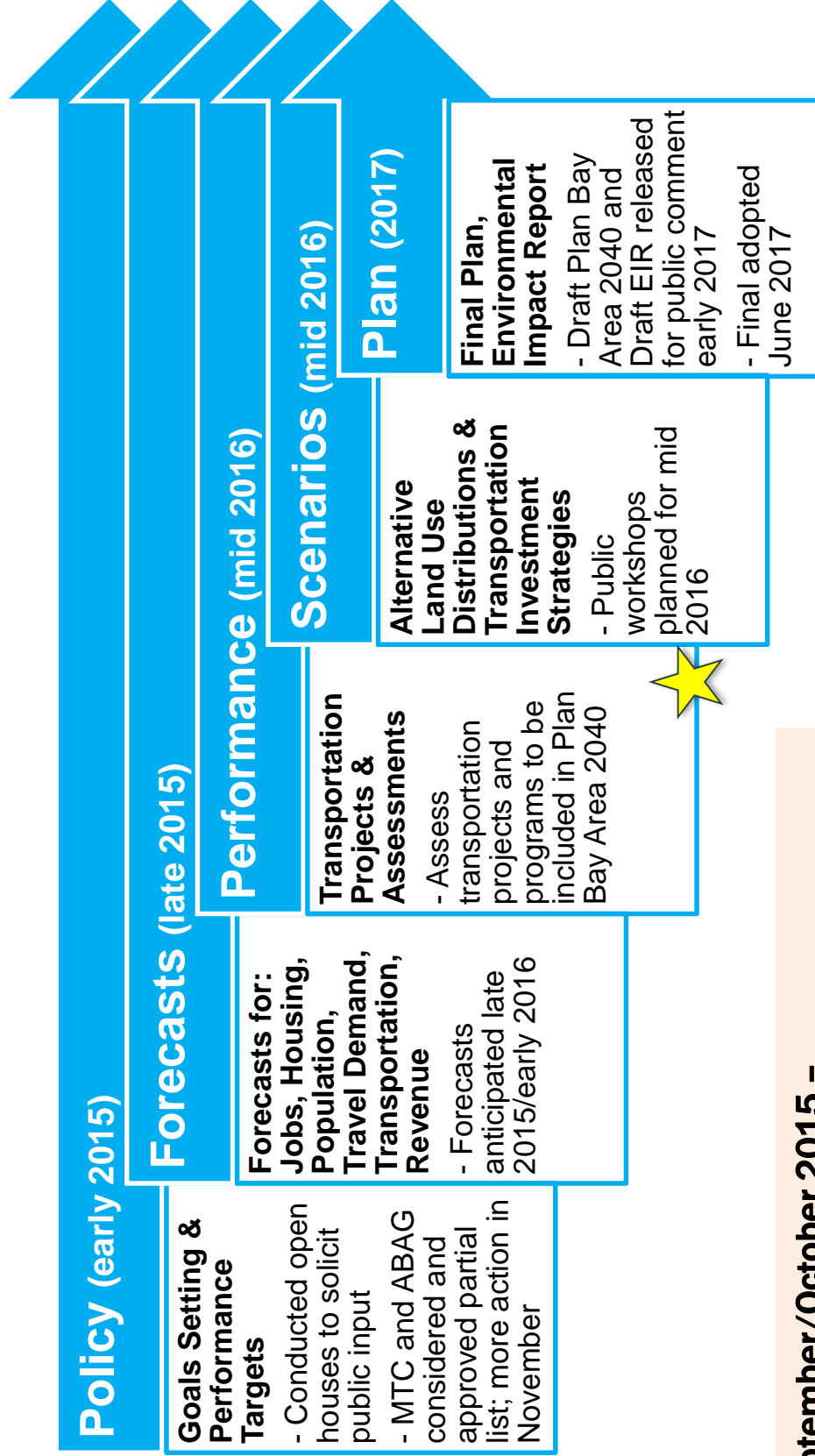
PLAN BAY AREA 2040 > SUMMARY

- ▶ **Blueprint for the region's transportation investment for the 9 Bay Area counties through 2040**
- ▶ **Regional strategy to meet greenhouse gas reduction targets**
- ▶ **Plan to accommodate the need for new growth**



Plan Bay Area 2040 Timeline

PLAN BAY AREA 2040 > SUMMARY



September/October 2015 -
 SFCTA approved list of projects and programs to submit to MTC for consideration for inclusion in PBA 2040

May / June 2016 -
 SFCTA revises project priorities to reflect modified discretionary funding target

Investment Performance Assessment

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

- ▶ **Projects - evaluate only largest capacity increasing projects that are seeking discretionary revenue**
- ▶ **Doesn't include:**
 - ▶ **Projects under \$100 million**
 - ▶ **Programmatic categories**
 - ▶ **Committed projects**

▶ **Purpose: Identify outliers – both high and low performers**

- ▶ **High – Eligible for regional discretionary funding**
- ▶ **Low – Have to justify why to include in PBA 2040**

Analysis Components

TARGETS ASSESSMENT
Assessed qualitatively using target scores
Determine impact on adopted targets

BENEFIT-COST ASSESSMENT
Assessed quantitatively using MTC Travel Model
Evaluate relative cost-effectiveness

Plan BayArea 2040



Benefit-Cost Assessment

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

- ▶ **Benefits modeled**
- ▶ **Travel time and cost savings**
- ▶ **Vehicle ownership savings**
- ▶ **Air pollution reduction**
- ▶ **Reduced collisions**
- ▶ **Increase in physical activity**
- ▶ **Decrease in noise**
- ▶ **Costs (annualized over the life of the plan)**
- ▶ **Capital costs**
- ▶ **Operating costs**

301
Geary BRT
B/C: 6 | Targets Score: 7.0



ANNUAL BENEFIT		ANNUAL COST				CAPITAL COST				NET O+M COST	
\$124M		\$20M				\$305M				\$82M	
Annual Benefit	\$124.1M	TRAVEL TIME + COST SAVINGS	Vehicle Ownership	GHG	PM	Other	Collisions	Physical Activity	Noise		
		Travel Time + Cost	\$13.3M	\$0.5M	\$0.5M	\$0.0M	\$5.6M	\$30.3M	\$0.1M		

BENEFIT - COST ASSESSMENT
(monetary benefits and costs are in millions of 2017 dollars)

TOTAL TARGETS SCORE	TARGETS ASSESSMENT										
	Climate Protection	Adequate Housing	Healthy + Safe Communities	Open Space + Agricultural Preservation	Equitable Access	Displacement Risk	Access to Jobs	Goods Movement	Non-Auto Mode Share	Road Maintenance	Transit Maintenance
7.0	STRONG SUPPORT	MODERATE SUPPORT	STRONG SUPPORT	MODERATE SUPPORT	MODERATE SUPPORT	STRONG ADVERSE	STRONG SUPPORT	STRONG SUPPORT	STRONG SUPPORT	MODERATE SUPPORT	MINIMAL IMPACT

CONFIDENCE ASSESSMENT		EQUITY ASSESSMENT	
Travel Model Accuracy	Framework Completeness	Equity Targets Score	Serves Community of Concern
✓	▲	3.5	Yes

B/C framework doesn't consider the value of relieving crowded transit vehicles and may be underestimating benefits of projects in areas with crowded conditions. This project can be implemented quickly to achieve benefits in the near-term.

For a map of all projects and their relationship to Communities of Concern, please refer to the Equity Map

<http://metropolitantransportationcommission.github.io/performance/>

Targets Assessment

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT



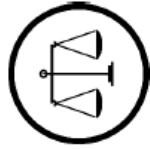
TARGETS ASSESSMENT

Assessed qualitatively using target scores

Plan
BayArea
2040



Climate Protection



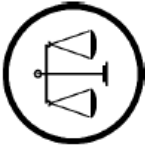
Affordable Housing



Non-Auto Mode Share



Adequate Housing



Displacement Risk



Road State of Good Repair



Healthy & Safe Communities



Access to Jobs



Transit State of Good Repair



Open Space & Agricultural Preservation

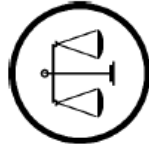


Job Creation



Housing & Transportation Costs

Goods Movement



Maximum score:

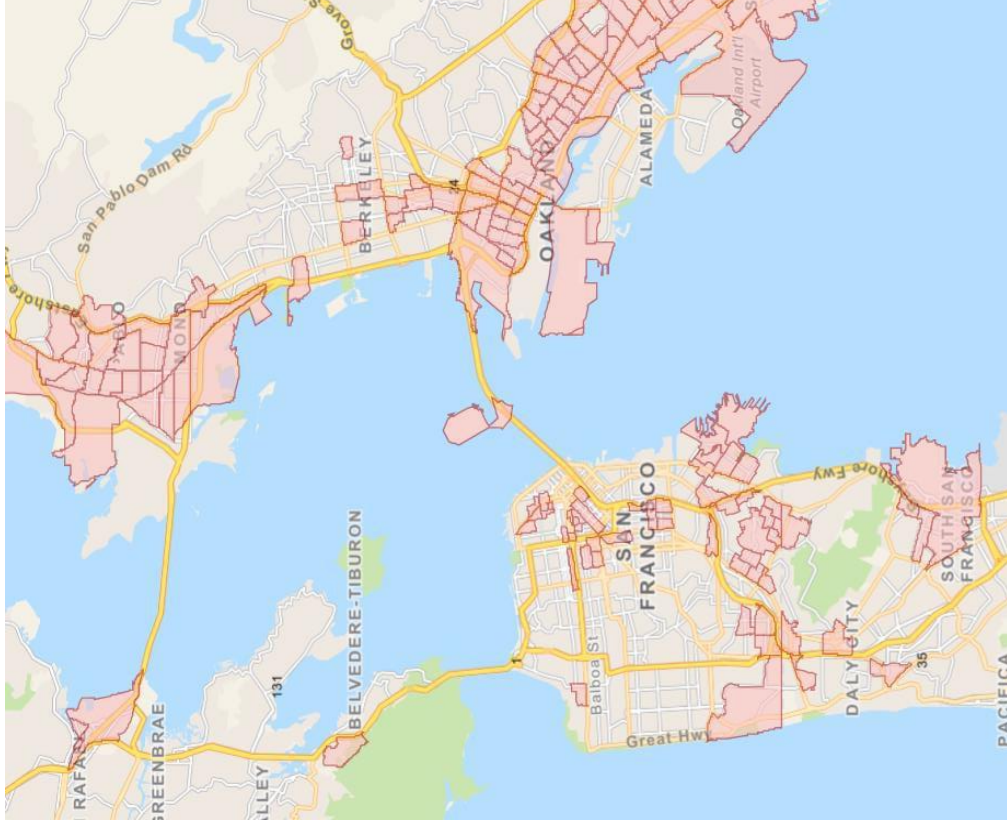
13

if the project supports all 13 targets strongly



Project-Level Equity Assessment

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT



▶ **Equity Target Score**

- ▶ **Health benefits and burdens**
- ▶ **Transportation and housing cost**
- ▶ **Share of affordable housing**
- ▶ **Displacement risk**
- ▶ **Access to jobs**
- ▶ **Job creation**

▶ **Relationship to Communities of Concern**

San Francisco Projects Evaluated (1 of 2)

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

- ▶ **Congestion Pricing (with related transit improvements)**
 - ▶ Treasure Island
 - ▶ Downtown San Francisco
- ▶ **Freeway Management**
 - ▶ US 101 HOV lanes in San Mateo and San Francisco
 - ▶ Express lanes on US 101 in San Mateo and San Francisco
- ▶ **Complete Streets/Bike/Pedestrian**
 - ▶ Better Market Street (includes transit)
 - ▶ Southeast Waterfront Transportation Improvements (includes transit)
 - ▶ Bay Bridge West Span Bike Path



San Francisco Projects Evaluated (2 of 2)

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

- ▶ **Transit efficiency and operations improvements**
 - ▶ **Muni Forward**
 - ▶ **Muni Service Expansion**
 - ▶ **BART Metro Program**
 - ▶ **Caltrain Modernization (e.g. electrification) and Service Expansion**
 - ▶ **Bay Bridge Express Bus Contraflow Lane**
- ▶ **Transit expansion**
 - ▶ **Geary Bus Rapid Transit (BRT)**
 - ▶ **M-Line/19th Avenue Core Capacity Project**
 - ▶ **Downtown Extension of Caltrain/High Speed Rail**
 - ▶ **Geneva BRT and Corridor Improvements (includes interchange)**
 - ▶ **New ferry service to Redwood City, Berkeley, Alameda Point**



State of Good Repair Evaluation

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT



▶ **Public Transit Maintenance**

▶ Rail operators

▶ Bus operators

▶ **Local Streets and Roads Maintenance**

▶ Preserve conditions

▶ Ideal conditions

▶ **Highway Pavement Maintenance**

▶ Preserve conditions

▶ Ideal conditions



MTC's Conclusions

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

- ▶ **Top priority is maintaining regional transit infrastructure**
- ▶ **Highly used transit systems and the highway system are backbone of the region**
- ▶ **Projects in chronically congested corridors provide biggest bang per buck**
- ▶ **Congestion pricing and road efficiency projects outperform road expansion projects**
- ▶ **All highest performing projects increase access to Communities of Concern**



San Francisco Project Performance

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT



- ▶ **Projects performed much better in Target assessment than Benefit-Cost assessment**
- ▶ **San Francisco projects performed significantly worse than prior plan but still have many high performers**

2013 Plan Bay Area High Performers:

PROJECT	Quantitative Benefit/Cost ratio	Qualitative (out of 10)
1 BART Metro Program	> 60	8.5
2 Treasure Island Congestion Pricing	59	4.0
3 Congestion Pricing Cordón Pilot	45	6.0
4 AC Transit Grant—MacArthur BRT	18	5.5
5 Freeway Performance Initiative	16	4.0
6 ITS Improvements in San Mateo Co.	16	4.0
7 ITS Improvements in Santa Clara Co.	16	4.0
8 Irvington BART Station	12	5.5
9 SFMTA Transit Effectiveness Project	11	7.5
10 Caltrain Electrification and six trains per hour service	5	7.5
11 BART to San Jose, Phase 2	5	7.0
12 Van Ness Avenue BRT	6	6.5
13 Better Market Street	6	6.0

Source: Metropolitan Transportation Commission

Plan Bay Area 2040 High Performers (estimated):

BART Metro
Treasure Island Congestion Pricing
Downtown Congestion Pricing
Caltrain Modernization/Downtown Extension
NEW - Geary BRT

San Francisco Project Performance

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

San Francisco low performers*:

- ▶ Southeast Waterfront Transportation Improvements
- ▶ Geneva BRT and Corridor Improvements
- ▶ Bay Bridge West Span Pathway**
- ▶ Bay Bridge Express Bus Contraflow Lane**
- ▶ San Francisco - Redwood City Ferry**
- ▶ Antioch – Martinez – Hercules – San Francisco Ferry**

***All projects have low benefit-cost scores, but medium performance target scores.**

****Regional projects that serve SF, submitted by others**



Why Low Performance?

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

- ▶ **MTC's model significantly underestimates benefits of San Francisco projects**
 - ▶ **Underestimates Muni trips by 25%**
 - ▶ **Overestimates trips on AC Transit (40%) and VTA (105%)**
- ▶ **No benefits calculated for:**
 - ▶ **Reducing transit crowding**
 - ▶ **Improving transit reliability**
 - ▶ **Safety improvements for walking, biking, transit**
- ▶ **Projects have been bundled, making costs higher and target performance lower**
 - ▶ **Geneva BRT and Corridor Improvements (includes interchange)**
 - ▶ **US 101 HOV and Express Lanes (includes San Mateo segment)**
- ▶ **All SF projects dinged for displacement risk target**



Requests Submitted to MTC

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

- ▶ **Weight performance targets equally with benefit-cost analysis when identifying high and low performers**
 - ▶ **Mitigates biases in benefit-cost analysis**
 - ▶ **Targets reflect a wider range of PBA 2040 goals and objects**
- ▶ **Redefine displacement risk target to “minimal impact” for jurisdictions that have implemented anti-displacement measures**
 - ▶ **Provides an incentive and rewards desired actions**
- ▶ **If possible, fix problems with the way the model treats San Francisco projects**
 - ▶ **We provided suggested technical fixes for short and long term**



Problematic Displacement Risk Target

PLAN BAY AREA 2040 > PROJECT PERFORMANCE ASSESSMENT

- ▶ **“Share of low- and moderate- income renters in Priority Development Areas that are at increased risk of displacement”**
 - ▶ Applied at the jurisdiction level, regardless of project type
 - ▶ 0 points – Minimal Impact, -0.5 points – Moderate Adverse Impact, -1 points – Strong Adverse Impact
- ▶ **ONLY San Francisco projects are identified as having a “strong adverse” impact**
- ▶ **Most projects have “moderate adverse”**
- ▶ **Recommendation:** Adjust target to “minimal impact” for jurisdictions that have adopted significant measures to address displacement issues

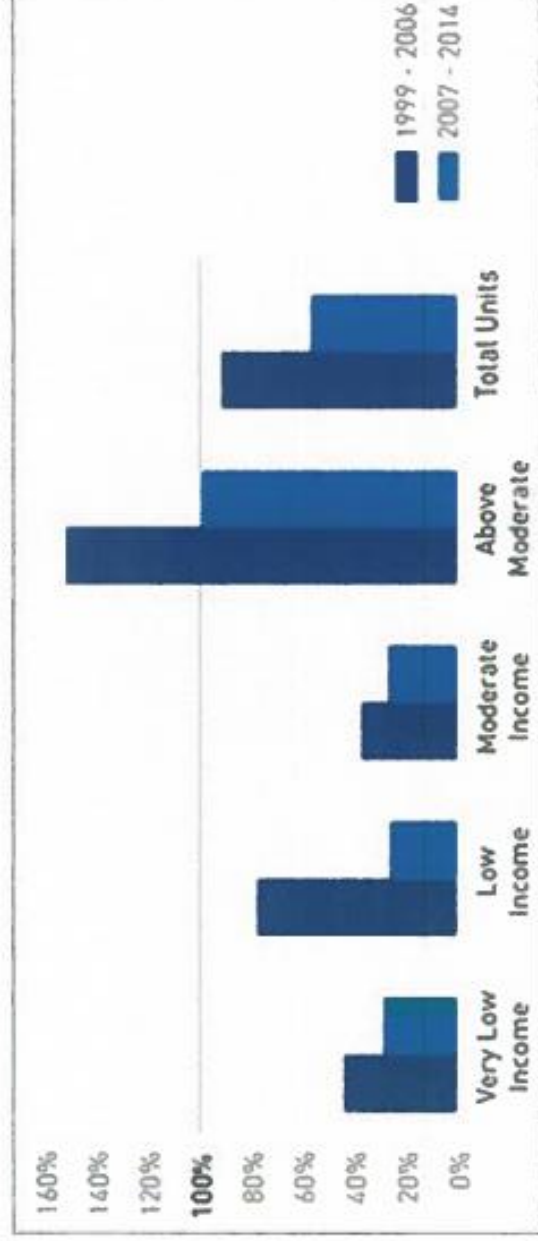


Regional Housing Crisis

PLAN BAY AREA 2040 > REGIONAL HOUSING ACTION AGENDA

- ▶ **Most expensive housing market in the country**
- ▶ **Since 2010 region has added 1 housing unit for every 5 new jobs**
- ▶ **\$1.2 billion/year housing funding gap**

Chart 2: Share of Regional Housing Needs Allocation Permitted 1999-2014
San Francisco Bay Area (Source: ABAG)



Broad Strategies to Address Crisis

PLAN BAY AREA 2040 > REGIONAL HOUSING ACTION AGENDA

- ▶ **Build new housing**
 - ▶ Special attention to low- and moderate-income housing
- ▶ **Protect existing affordable units at risk of displacement through programs and/or policies, e.g.**
 - ▶ Rent control
 - ▶ Inclusionary housing
 - ▶ Direct subsidies
- ▶ **Advocate for new funding**
 - ▶ Local self-help strategies (e.g. San Francisco's \$300 million bond)
 - ▶ New/replacement state and federal resources



Near Term Strategy – OBAG 2

PLAN BAY AREA 2040 > REGIONAL HOUSING ACTION AGENDA

- ▶ **One Bay Area Grant Program (OBAG) Cycle 2**
 - ▶ **\$790 million over 5 years**
 - ▶ **Program adopted in November 2015**
 - ▶ **\$72 million in additional funds available through federal transportation bill**
- ▶ **Possible investment proposals**
 - ▶ **Housing-related programs**
 - ▶ **Core capacity transportation investments**
 - ▶ **County programs**

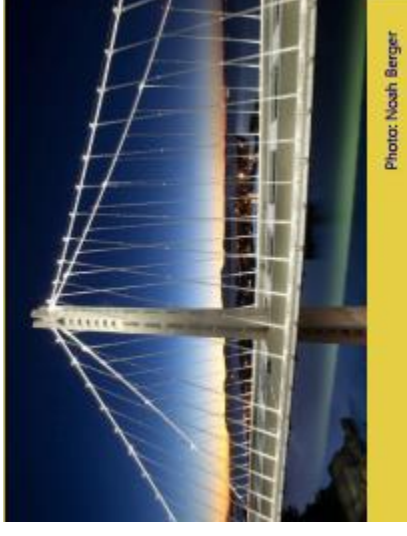


Photo: Noah Berger



OBAG 2 Housing Program Options

PLAN BAY AREA 2040 > REGIONAL HOUSING ACTION AGENDA



- ▶ **Reward Jurisdictions**
Bonus for cities/counties (2015 – 2019)
- ▶ **Direct Investment**
Pilot preservation loan fund
- ▶ **Regulatory Approach**
Additional funds conditioned on adopted housing policies, affordable housing production, and/or current affordability



Photo: Bridge Housing, Armstrong Place

▶ **MTC Action in June 2016**

Proposed Medium Term Strategies

PLAN BAY AREA 2040 > REGIONAL HOUSING ACTION AGENDA

- ▶ **Infrastructure finance fund**
- ▶ **Similar to existing Transit Oriented Affordable Housing (TOAH) program**
- ▶ **Could include new Naturally Occurring Affordable Housing (NOAH) program**
- ▶ **MTC has existing authority, just needs funding**
- ▶ **Regional jobs-housing linkage fee**
- ▶ **Regional housing bond/fee and trust fund**



What's Next? (Estimated Schedule)

PLAN BAY AREA 2040 > NEXT STEPS

April CAC / May Plans and Programs	SFCTA agenda item on results of project performance assessment and regional housing policies
June 14, 2016 6:30-8:30pm	Plan Bay Area 2040 San Francisco Open House Hotel Whitcomb (1231 Market St)
May 2016	ABAG releases draft scenario performance assessment
May CAC / June Plans and Programs (anticipated)	SFCTA agenda item approving revised project priorities - ACTION
June 2016	MTC approves final list of high and low performing projects, approves OBAG 2 policies
June CAC / July Plans and Programs	SFCTA agenda item evaluating progress toward meeting PBA 2040 goals and objectives and preferred scenario input
July 2016	MTC/ABAG release draft preferred scenario
September 2016	MTC/ABAG adopt preferred transportation investment and land use scenario
September 2016 through June 2017	MTC/ABAG perform environmental review of preferred scenario
June 2017	MTC/ABAG adopt Plan Bay Area 2040



Questions?

For more information:
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www.sfcta.org/rtp



SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY



**METROPOLITAN
TRANSPORTATION
COMMISSION**

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WEB www.mtc.ca.gov

Memorandum

TO: MTC Commission

DATE: April 22, 2016

FR: Executive Director

RE: Advancing the Regional Housing Agenda

Background

The Bay Area's current housing crisis reflects the cumulative impacts of both its robust job market and its abject failure to keep pace with housing construction, especially near growing job centers, over the last 40 years. Since 2010, the Bay Area has added almost 500,000 jobs but only 50,000 new housing units. In addition, significant cuts to federal and state housing programs have further limited the ability of public agencies to meet the growing needs of low- and moderate-income renter households given median wage deflation from 2000-2013. Annual housing funding shortfalls to meet the region's Regional Housing Needs Allocation for 2014-22 and for the Plan Bay Area period exceed \$1 billion annually, while households are faced with the most expensive housing market in the nation. These housing challenges and rapid job growth have been accompanied by record levels of freeway congestion, and increased crowding on many regional transit systems. More information on the Bay Area's chronic housing challenge can be found in the brief white paper in Attachment A.

Addressing housing affordability and neighborhood stability in the Bay Area is not only critical to ensuring that all residents have access to decent and safe living conditions but also the ability of the region to continue to add jobs and attract skilled workers, achieve Plan Bay Area's sustainable growth objectives by reducing greenhouse gas emissions from transportation, and meet its equity goals through a stronger link between the locations of jobs and housing.

MTC has historically played a limited, but growing role related to housing, providing incentives and direct grants to local jurisdictions and transit agencies to support market rate and affordable infill development in transit-accessible neighborhoods. Since 1998, MTC has provided planning and capital grants, adopted the Resolution 3434 TOD policy, invested in the Transit Oriented Affordable Housing (TOAH) revolving loan fund, and created the OBAG housing incentive program among other initiatives, as outlined in the timeline in Attachment B.

In the transportation sector, when faced with growing demand and similar funding shortfalls in the 1980's and 1990's, transportation agencies throughout the region initiated self-help transportation programs. By 2010, these programs, including county sales tax and vehicle registration fees as well as Regional Measure 2, raised almost \$1 billion annually to supplement stagnant state and federal transportation funding. MTC has also developed a comprehensive legislative advocacy program related to transportation funding and policy. The key question addressed in this memo is whether the region in general – and MTC in particular – should follow

a similar self-help model to rapidly expand the production and preservation of affordable housing in the Bay Area.

Based on Commission direction in fall 2015, MTC and the Association of Bay Area Governments (ABAG) convened a regional forum, *Calling the Bay Area Home*, on February 20, 2016, to further consider the role of regional agencies in addressing displacement and affordable housing. Approximately 300 residents, business organizations, elected officials, and other stakeholders attended the forum. A recap of the forum, including videos and position papers, is available on the MTC website: <http://mtc.ca.gov/whats-happening/news/february-forum-jumpstarts-conversation-housing-policy>.

The event was structured around the three potential policy approaches, recognizing that there is no singular solution to the housing crisis:

- Build new housing including market-rate and affordable units.** The Bay Area has not produced an adequate number of housing units for its growing population for decades. While there are a number of reasons why this has occurred in the past, the region needs new tools and resources to fund and deliver both market-rate and affordable housing near transit and job centers in the future. Higher production of new housing near transit and job centers will, in the long-term, improve housing affordability and neighborhood stability at a regional level.
- Protect existing affordable units and low- and moderate-income households that are at risk of displacement.** Both preservation of at-risk deed-restricted units near transit as well as acquisition and protection of existing market-rate rental units as affordable housing are key strategies to maintain affordability in neighborhoods where rents are rising faster than incomes. Without subsidies though, the market is unable to provide housing for low- and moderate-income households. Even though some public subsidies are available for low-income housing, there are no dedicated sources of funding available to support moderate-income housing.
- Advocate for self-help solutions as well as increased state and federal resources.** The lack of adequate funding for state and federal housing programs and infrastructure funding to support transit-oriented infill housing has coincided with a significant increase in demand for rental and affordable housing production subsidies, thereby creating the perfect storm. Similar to the “self-help” approach for transportation projects, the region needs to raise more of its own revenue to address the growing housing and affordability crisis. In the case of some new regional approaches to housing funding (such as a multi-county tax or bond measure), state legislative authorization will be needed.

Outlined below are short and medium-term initiatives that the Commission could choose to pursue to increase housing and support long-term affordability throughout the region. These initiatives are not intended to represent all of the possible actions that can be taken regionally and no one initiative will be sufficient to address the long-term housing challenges the Bay Area is facing. Instead, the options present a range of approaches in terms of timing, ease of implementation, and magnitude of potential impact in addressing the housing crisis – to jumpstart the discussion and to consider in the context of the institutional question to be discussed in your next item on MTC and ABAG integration. Staff seeks Commission direction on which housing action alternatives to pursue further.

Housing and the One Bay Area Grant Program – Near-Term

As previewed in a December 2015 report to the Commission, preliminary estimates indicate that the Bay Area’s share of One Bay Area Grant funds – federal highway dollars known as Surface Transportation Program (STP) and Congestion Mitigation and Air Quality Improvement Program (CMAQ) – will increase by approximately \$72 million through the end of the OBAG 2 funding cycle as a result of the enactment of higher authorization levels in the Fixing America’s Surface Transportation (FAST) Act. Although the housing forum did not focus specifically on OBAG, the funding program was discussed as a possible strategy to incentivize jurisdictions to tackle the housing affordability challenge.

Staff outlined three initial investment concepts at the recent March 2016 Partnership Board meeting including a distribution of the additional revenues according to the adopted OBAG 2 framework with 45% being directed to the county programs through the existing housing incentive formula (\$32 million) and the remaining 55% being directed to various regional programs (\$40 million), as well as Options A and B described in more detail below. Since these funds were unexpected and present an opportunity to address critical challenges facing the Bay Area, staff recommends the Commission focus its consideration on Options A and B below rather than the “stay the course” option:

- A. Invest the increase on near-term regional transportation priorities that can deliver congestion and transit crowding relief in key corridors. This is similar to previous Commission actions that focused federal augmentation funds toward a key safety investment in the Golden Gate Bridge suicide barrier or bailed out the State Transportation Improvement Program during a prior state funding trough.
 - ***Bay Bridge Core Capacity Project:*** The San Francisco-Oakland Bay Bridge Corridor is the most congested in the region and is the workhorse of the seven State-owned toll bridges, carrying nearly 160,000 vehicles westbound across the bay. Transbay peak transit service is also at capacity – with BART, buses and ferries all experiencing crush loads. However, there are opportunities to add a second or third person to many solo vehicles, thus moving more people in fewer cars and buses to make better use of the bridge’s capacity. Implementation of near-term, cost-effective operational improvements that offer travel time savings, reliability and lower costs for carpooling and bus transit use will help us make significant progress.

Potential near-term operational strategies include: establish Bus/HOV lane on West Grand Ave. on-ramp, convert HOV lane to express lanes on Sterling Street on-ramp to facilitate carpooling in eastbound direction, facilitate casual carpooling opportunities in San Francisco and Oakland, provide more frequent, higher-capacity transbay express bus services, deploy arterial signal/transit signal priorities to improve bus speed and reliability, create more commuter parking facilities, offer flexible, on-demand transit serving markets in East Bay, San Francisco and further down the Peninsula, and deploy Intelligent Transportation Systems (ITS) strategies to better manage the entire

bridge corridor, including approaches at I-580, I-80 and I-880. The \$72 million in OBAG funds could fund these core capacity improvements as well as shore up transit funding for near-term capacity expansion projects within the Bay Bridge Corridor. Additional detail about this proposal can be found in Attachment C.

- B. Focus the increase on direct housing investments or a bonus for local jurisdictions that produce housing to help address the region's housing crisis. There are a number of different approaches to use OBAG funding to support housing, including a transportation grant reward, direct investment in housing preservation, or conditioning the receipt of OBAG funds on local housing policies.

Should the Commission choose to focus the OBAG augmentation on housing as outlined in Option B above, staff offers the three different short-term approaches described below for your consideration to support the production and preservation of affordable housing.

1. **Reward Jurisdictions:** Award the additional OBAG funding available via the FAST Act to cities and counties that produce the most low and moderate income housing in Priority Development Areas from 2015-2019. This would deviate from the current CMA county-based approach by providing direct rewards to local jurisdictions based on prospective housing production using some or all of the \$72 million in available funding, offering transportation grants to cities and counties that deliver desperately needed affordable homes.
2. **Direct Investment:** Invest in a revolving loan fund to convert apartment buildings to deed-restricted affordable units over time. This pilot-project would secure long-term affordability at a lower per-unit cost than constructing new affordable housing. This investment would complement MTC's TOAH investment with a "little brother" that might be called the Naturally Occurring Affordable Housing (NOAH) program. Like TOAH, these new loan funds could be returned to MTC, and MTC can require minimum leverage from other funding sources. This approach would require some exchange of funds to address eligibility limitations of FAST Act funds. MTC's investment could be leveraged by as little as 3:1 or as much as 7:1, preserving 200 – 2,000 homes in the process.
3. **Regulatory Approach:** Condition additional funding to cities based on what anti-displacement policies are in place, their recent affordable housing production, or their current level of affordability to low-wage workers. Current adopted city and county housing policies have been inventoried by ABAG and a menu of policies for consideration could include accessory dwelling units, by-right development, commercial-linkage fees, just-cause evictions, rent stabilization, or inclusionary zoning.

Attachment D provides more detail on how options 1 through 3 could be operationalized.

Housing Initiatives Beyond OBAG – Medium Term

Under the merged planning department outlined in MTC Resolution 4210 – or the recently recommended Option 7 – there is an opportunity to mobilize new initiatives that are needed for the region to exceed its abysmal 35% RHNA performance for very low, low and moderate income units, while also supporting increased market rate supply. Based on the housing forum and subsequent discussions with stakeholders and city staff, MTC staff has identified three

regional initiatives that can further support housing construction for the Commission to consider. These initiatives are intended to have limited or no impact over the medium term on existing transportation funding streams while providing support to a range of communities across the region. As noted above, the Bay Area is a wealthy region with a track record of financing transportation, schools, and open space at the city, county and regional level. Housing should be no different. San Francisco has already adopted a \$300 million housing bond, with Alameda County and others considering a fall 2016 measure. These resources, coupled with the strategies below, will be required to put a dent in the annual \$1+ billion affordable housing funding shortfall. More details on these efforts can be found in Attachment E, and are summarized in the table below.


<i>Potential Regional Housing Strategies</i>	<i>Potential for Regional-Level Impact on Housing</i>	<i>Timeframe for Implementation</i>
Within MTC's Existing Authority		
Infrastructure Finance Fund	Medium	1 – 3 years
Outside MTC's Existing Authority, requires State Legislation and Voter Approval		
Regional Jobs-Housing Linkage Fee	High	2 – 5 years
Regional Housing Bond/Fee Program and Trust Fund	Medium	2 – 4 years

Required Legislation

To implement a self-help approach to the region's housing crisis, MTC, ABAG, and their city and county partners will need to secure legislation that allows for multi-county bonds or fees to support housing construction and housing related infrastructure similar to the legislation authorizing a regional gas tax. The region needs both a regular and substantial source of housing funding to address the \$1+ billion shortfall and a means to administer those funds through a joint powers agreement or another mechanism.

Staff consultation with affordable housing providers, market-rate developers, foundations and equity stakeholders suggests that there is strong interest in developing a Bay Area housing affordability advocacy platform that advances policy and funding mechanisms specific to the Bay Area and its needs.

MTC has regularly supported bills that will increase the supply of housing and will continue to support key legislative initiatives that can help the region achieve its Plan Bay Area housing objectives. However the region should not count on the state or the federal government suddenly changing course after years of disinvestment in housing. Staff strongly believes that the region must tackle the housing crisis head-on as if the Bay Area's economy and livability depend on it – because they do. We look forward to your discussion about MTC's proper role in that ambitious undertaking.



Steve Heminger

Attachment A: Key Challenges for Bay Area's Housing

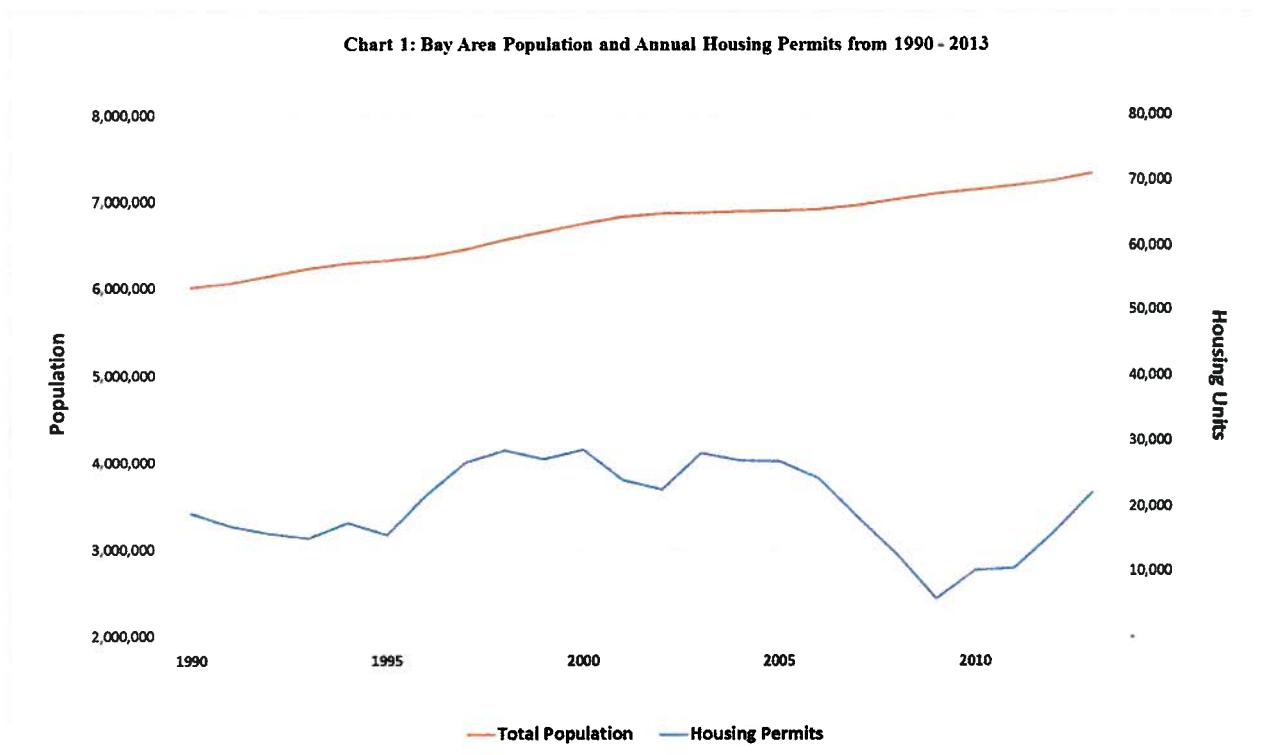
Overview

The Bay Area's housing affordability and neighborhood stability crisis has been decades in the making. It is the cumulative outcome of numerous local, regional, state and federal legislative and regulatory actions (or inactions) over the last 40 years, arguably all the way back to the mid-1970s, when the rate of housing construction in the Bay Area first started to lag behind the rest of the country¹.

Since there are multiple perspectives among various stakeholders on the root causes of and solutions to the current housing crisis, staff has developed this white paper in an attempt to capture these various perspectives on key challenges for review and consideration by the MTC Commission as it develops proposals for regional action. While this paper presents the key findings from staff research, it does not represent a comprehensive account of all the housing issues in the region.

Key Housing Challenges

1. **Housing production in the Bay Area has lagged growth in jobs and residents for decades** – The region has consistently failed to build an adequate number of housing units to accommodate the growing number of jobs and residents in the region. For example, *since 2010, the region has added only 1 new unit for every 5 new jobs*. Chart 1 compares the 25-year population and annual housing permits, noting the region adding population every year during that period. Lack of adequate supply to meet our growing population is a major contributor to high housing costs in the region.



While the cost of housing has increased significantly for both owner and renter households, the level of support and protections for homeowners is far higher than for renters², leading to a higher risk of displacement for renters during periods of growth and expansion. If housing production consistently lags demand, a housing crisis, especially for renters during a jobs boom, is unavoidable.

¹ See CA Legislative Analyst's Office Report, 2016, at <http://www.lao.ca.gov/Publications/Report/3345>

² Homeowners benefit from Proposition 13, which limits increases to their property taxes, and from federal tax policies, which allow tax deductions on mortgage interest.

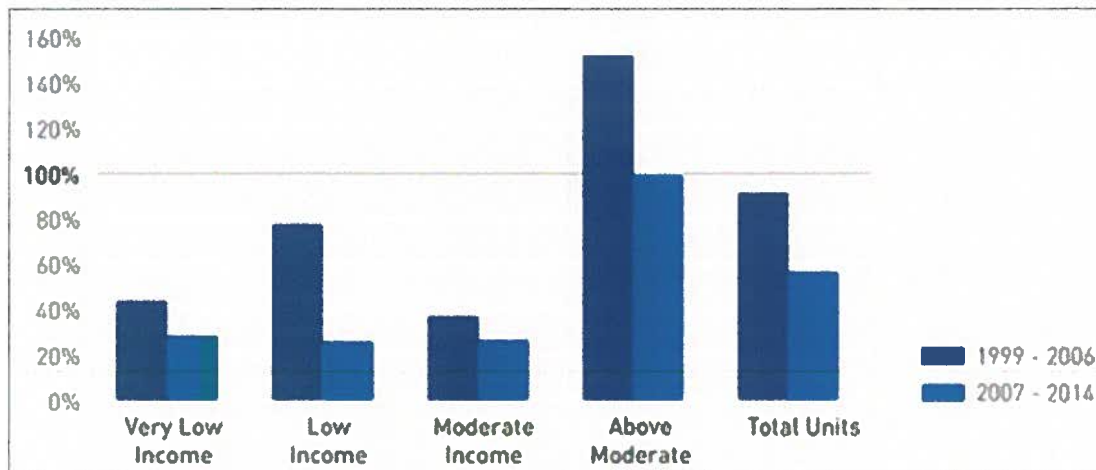
“Our goal is not to stop all development. Our goal is to stop incredibly large development that focus exclusively on market-rate housing.”

– Edwin Lindo, Vice President for External Affairs for the San Francisco Latino Democratic Club, in an interview with the San Francisco Business Times referring to a proposed moratorium on building new housing in the Mission District (July 2015)

Typically, as market-rate rental housing ages, it becomes more affordable to a wider range of households. For example, as shown in the chart below, market-rate rental housing built in the high-cost cities of Los Angeles and San Francisco between 1980 and 1985 were high in 1985 (rents were over 80%), but the same units were more affordable (rents were close to median of all rental units) in 2011, a 1% increase in affordability year-over-year.

2. **Affordable housing production in the Bay Area has lagged even further behind market-rate units** – Since 1999, the region has built less than a third of the units needed to meet the needs of vulnerable populations such as low- and moderate-income households, seniors and the homeless. *The private market hasn't been able to provide housing for even middle-income households*, especially since the cost of land and construction in the Bay Area has increased faster than the rate of inflation. As illustrated in Chart 2, the Bay Area has struggled to meet all of its Regional Housing Needs Targets, issuing permits for about 35% of the needed low and moderate income housing. This left over 100,000 affordable units unbuilt from 1999-2014. The region exceeded its above moderate (market rate) housing targets over the same period, but too often those homes were far from established job centers. Looking forward, the strong housing market and fewer affordable housing resources are likely to result in similar results going forward.

**Chart 2: Share of Regional Housing Needs Allocation Permitted 1999-2014
San Francisco Bay Area (Source: ABAG)**



In fact, housing production for moderate income households (the region's middle class) has been lower than any other income category since the 1990s³. The market provides a diminishing number of homes for non-affluent buyers and subsidies for moderate income households are largely nonexistent.

“We can't build our way out of the housing crisis . . . but we won't get out without building.”

– Rick Jacobus in an article, *Why We Must Build* – <http://www.shelterforce.org> (March 2016)

³ See Regional housing Needs Allocation Report for 1999-2014, ABAG

3. **Even the housing that is built is not “location-efficient”** – Much of the recent housing production has occurred in East Bay jurisdictions while much of the job growth in high-growth industries is concentrated in the West Bay. This has led to longer commutes, more congestion on highways and local streets, higher environmental and health impacts, and higher transportation costs for all workers. These outcomes not only affect Bay Area residents’ quality of life, but also limit the economic growth potential of the region’s employers.

The lack of affordable housing close to low- and moderate-wage jobs, which are often co-located with the high-wage jobs, creates an even bigger imbalance for low- and moderate-income households. These households are unable to compete with higher-wage workers for the limited number of market-rate housing units in neighborhoods near jobs and transit. This jobs-housing mismatch has resulted in higher displacement risk, longer commutes and higher transportation costs for lower-wage workers⁴.

4. **Instead of facilitating planned development, strong local and state regulations often prevent all development** – Many local jurisdictions have laws that require developers to secure conditional use permits for housing developments that are consistent with adopted zoning codes and general plans furtherer delaying and restricting new housing construction. These requirements – essentially prohibiting “by-right” development, even affordable housing development – are largely non-existent in most other metropolitan regions (New York, Washington DC and Seattle, among others).

"It is long past time that we as an agency recognize the need. Will it drive some developers away? Probably. Those left standing will understand the requirements."

– *BART Director Joel Keller, City of Antioch, speaking after the agency adopted a policy that requires developers to provide 20% affordable housing units in projects built on BART station property (February 2016)*

Similarly, *state environmental protection laws inadvertently restrict higher-density, mixed-use, infill development*, leading to cost escalation due to delays and litigation. While SB226 and SB743 have attempted to address the issue, the impact of such laws relative to enabling infill development has been modest.

A report released by the law firm Holland & Knight in August 2015 found that projects designed to advance California’s environmental policy objectives are the most frequent targets of CEQA lawsuits: transit is the most frequently challenged type of infrastructure project (more than both highways and local roadways); renewable energy is the most frequently challenged type of industrial/utility project; and housing (especially transit-oriented housing) is the most frequently challenged type of private-sector project. *Almost 80 percent of all CEQA challenges were filed against infill development.* These outcomes can only be described as utterly perverse.

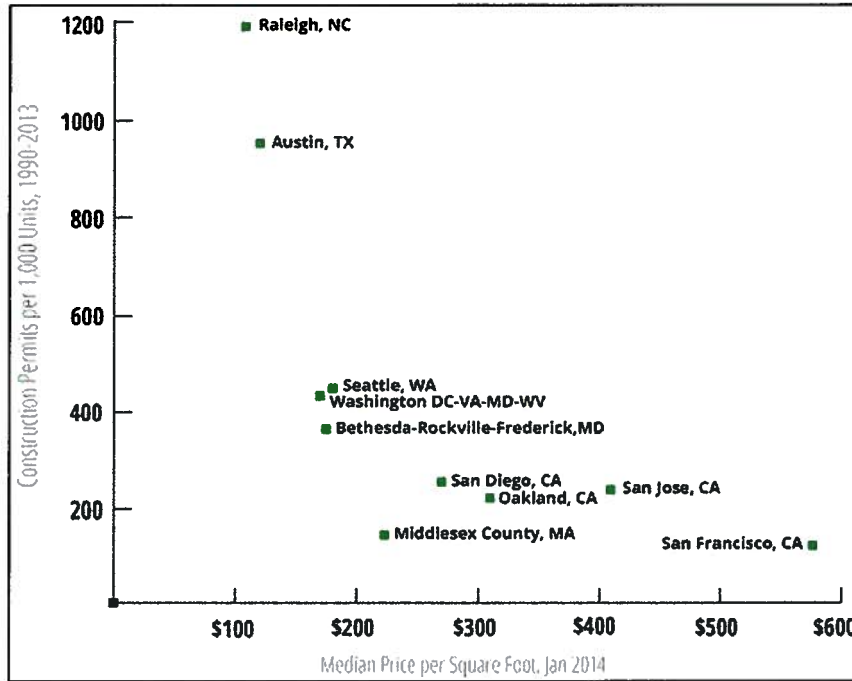
"An adequate supply of housing cannot be built in a day, but will be built faster if we work together and avoid the false and polarizing choice of affordable versus market-rate. We need both, and building new market-rate housing takes pressure off existing supply that serves residents from a wide range of incomes."

– *Dr. Micah Weinberg, President of the Bay Area Council Economic Institute and a renter in Oakland, in a guest commentary – Oakland housing crisis is a deep hole, but it must start digging – in Inside Bay Area (March 24 2016)*

⁴ See: <http://interact.regionalchange.ucdavis.edu/roi/>

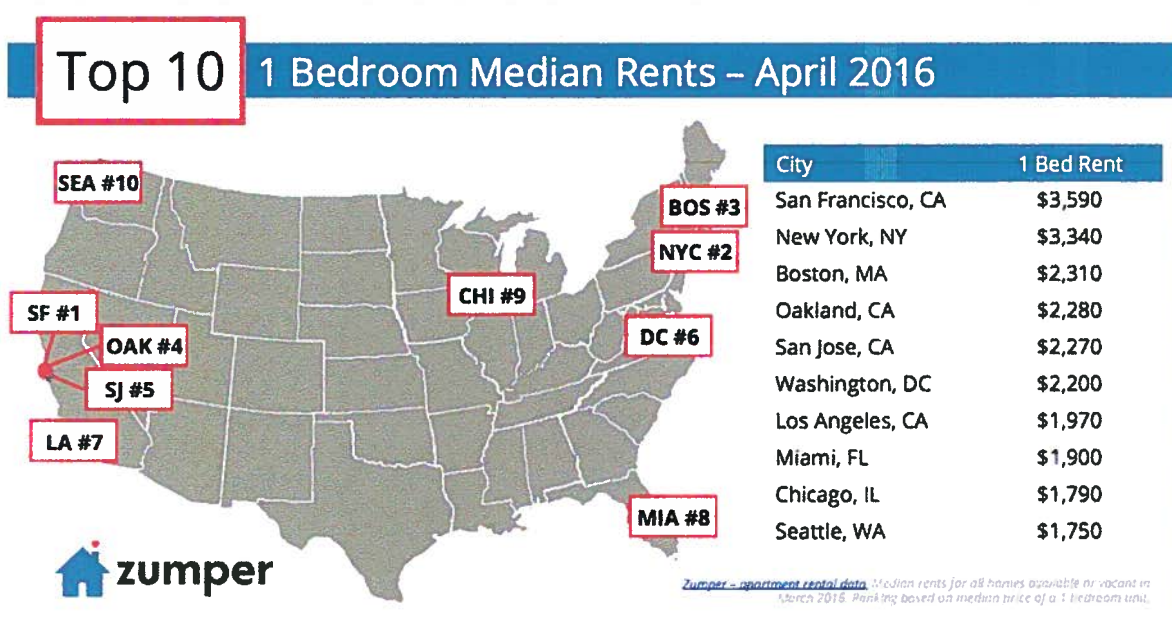
Chart 3 below compares housing cost per square foot in 2013 with housing permits per 1,000 homes in 1990. During that span, Seattle, WA issued construction permits at a rate of a little over 400 new permits for every 1,000 units that existed in 1990. During the same time, San Francisco, CA permitted just 117 units for every 1,000 units that existed in 1990. In 2014, home prices in Seattle, WA were a little under \$200 per square foot, compared to almost \$600 per square foot in San Francisco.

Chart 3: Home Prices and New Construction in Technology Hubs 1990-2013 (Source: Trulia)



The cost of housing is not limited to home purchases. As seen in Chart 4, the Bay Area is now home for four of the five most expensive rental markets in the nation.

Chart 4: Cities with the Highest Rents, 2016 (Source: Zumper Real Estate)



- 5. Low- and moderate-income renters face high displacement risk in almost every city** – As housing costs rise, lower-income renters are often forced to move to neighborhoods farther away from jobs, transit and amenities. The lack of adequate tenant protections, or availability of subsidized or “naturally affordable” market-rate units in the most “desirable” neighborhoods, has accelerated displacement of lower-income residents and businesses from the urban core.

"It made my heart sink and my stomach feel bad. We are not against affordable housing. We just want to see it done in a sensible, responsible, good way."

– *Marin resident and President of the Lucas Valley Homeowners Association, Maggie McCann, referring to filmmaker George Lucas' proposal to use \$100 million of his own money to finance 224 low-income apartments on a piece of land he owns called Grady Ranch (June 2015)*

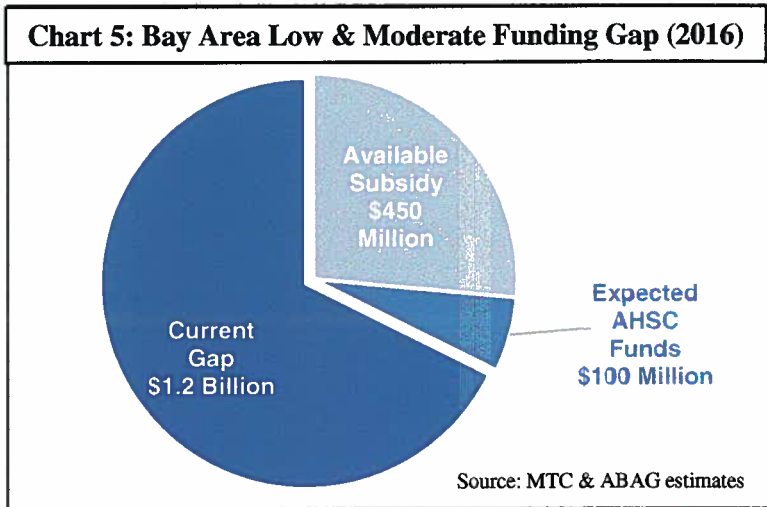
Without their strong rent stabilization and just cause provisions in place, cities such as San Francisco, East Palo Alto and Oakland would have been expected to lose even more lower-income renters. Despite the benefit of tenant protections many lower-income renters have relocated to more affordable neighborhoods in the suburbs, unintentionally displacing existing residents in these communities to locations farther from the region’s core and related employment centers. This domino effect is one reason why *even the most affordable cities in east Contra Costa and Solano County are experiencing displacement*. Communities that add jobs but not sufficient housing pose the highest risk of displacement to lower-income renters. Communities that have historically underbuilt market-rate and affordable housing have lost the largest percentage of lower-income renters since 2000⁵. These

- 6. Elimination of Redevelopment Authorities has further restricted infill development and affordable housing production** – The dissolution of redevelopment agencies by the state has eliminated a large source of funding for infill and affordable housing projects, and restricted the ability of local jurisdictions to secure and assemble parcels, fund infrastructure improvements that support market rate and affordable housing development. *Redevelopment authorities in Alameda County contributed more than \$500 million for affordable housing between 2001 and 2011*⁶.

"The scale of the affordable housing crisis and the need for funding to address it over the next five years is much greater than \$250 million — more like twice that amount (in San Francisco). We appreciate the mayor’s commitment to a bond measure, and we urge him to push as far as possible."

– *Peter Cohen, Director of Council of Community Housing Organizations, referring to Mayor Ed Lee's proposal for a bond issue to fund affordable housing in San Francisco (February 2016)*

- 7. Declining state and federal resources have constrained the ability of public agencies to respond**
As state and federal funding for housing programs has declined, the number of low- and moderate-income households that are rent burdened has increased significantly. Chart 5 shows the current annual funding gap to construct the low and moderate income units allocated to the Bay Area for the 2015- 2022 regional housing needs cycle. The lack of resources, in light of the dissolution of local redevelopment functions and the end of the Proposition 1C funding, creates a tremendous challenge to the region as it seeks to catch up with its past low and moderate income housing construction shortfall.



⁵ See: http://planbayarea.org/pdf/prosperity/research/REWS_Final_Report.pdf

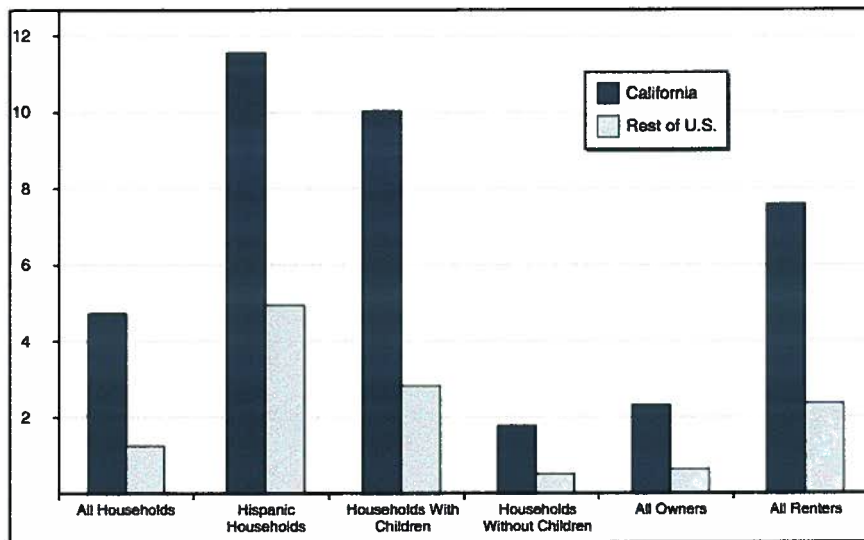
⁶ See: <https://www.acgov.org/cda/hcd/documents/Lost-Redevelopment-funds-impact-Affordable-Housing.pdf>

8. **Availability of developable land is limited due to geography and strong land protections** – The Bay Area has done an excellent job of protecting large tracts of wetlands, agricultural land and open space compared to most other metropolitan areas. This effort has limited sprawl on “greenfields”, expanded recreational opportunities and preserved scenic and natural resources. However, the resulting constrained supply of developable land coupled with significant and multiple challenges to infill development has severely restricted housing production across the region.

As mentioned before, the lack of housing production, in the long term, creates conditions for significantly higher housing costs in later years. This dynamic has also led to the long-term trend of Bay Area workers commuting from nearby regions with comparably affordable housing. These long distance commutes to homes, often developed on former farmland, leads to higher per capita greenhouse gas (GHG) emissions and traffic congestion at the region’s gateways.

9. **Wages of low- and moderate-income households have lagged behind rising housing costs** – Even as housing costs rise and funding for housing programs decline, wages of low- and moderate-income households have not kept pace with the rate of inflation. Real wages for many renters have actually declined in terms of purchasing power, with 2013 median household income still below 2000 median household income though it is on the rise. Chart 6 shows a critical way wage and housing pressures manifests itself, with high crowding throughout the state at a rate nearly four-times the national average. California now has the highest share of overcrowded renters in the nation. *Nearly 30 percent of the country’s households living in overcrowded conditions are in California* (CHPC, 2014).

Chart 6: Crowding Rates in California and the Rest of US, 2013 (Source: LAO Report, 2016)
Percentage of Household Type Living in Crowded Housing



10. **Proposition 13 has resulted in fiscalization of development decisions** – State law caps property tax increases for owners of residential and commercial property. While Prop 13 benefits long-term homeowners, it reduces the fiscal benefits of housing when compared to retail or commercial development, leading many jurisdictions to view housing as a “net loss”. *Homeowners also lack the motivation to allow new residential development in their neighborhoods*, since lower supply provides significant financial benefits in terms of higher housing values and increased equity.

On the other hand, Owners of commercial property lack the motivation to develop vacant parcels since the “cost” of holding these properties is relatively low, and a potential windfall from rising land values over time relatively high. Consequently, even in “hot” real estate markets, many parcels remain vacant and underutilized. Proposition 13 is another key aspect of the perfect storm of heavy regulation, limited subsidies and disincentives that together make the Bay Area unaffordable for many families in 2016. Peer metropolitan regions in other states do not have a comparable statute that provides extreme advantages for long-term homeowners and puts entry level households at a distinct disadvantage.

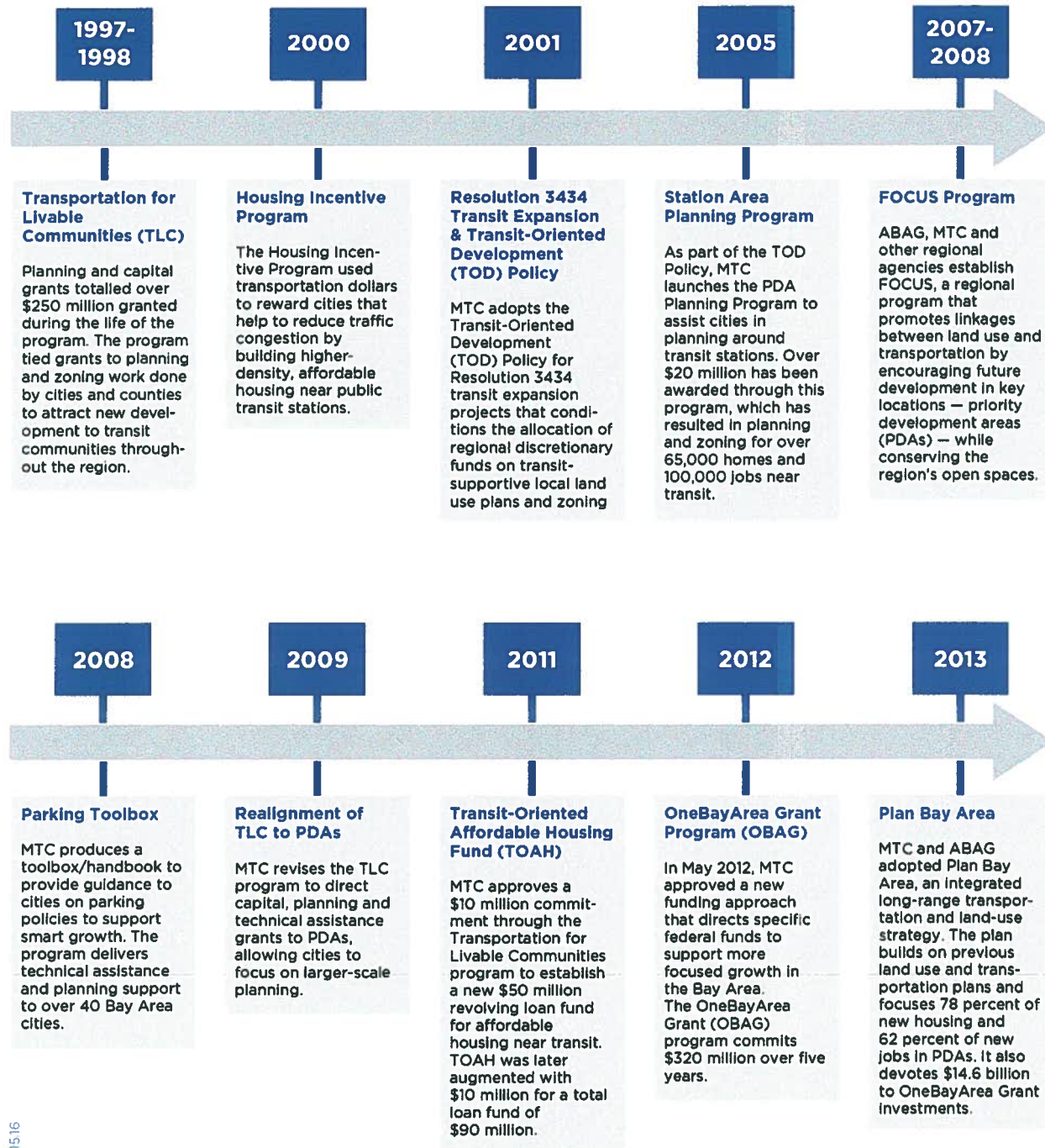
11. **A relatively large number of currently deed-restricted affordable housing units are at risk of conversion to market-rate units** – A recent report⁷ published by the California Housing Partnership Corporation (CHPC) identified around 6,000 units in the region that are at risk of conversion. A large share of these units are located close to transit. All of these units currently house low-income renters. Preserving these units as permanently affordable housing is significantly cheaper than building new affordable units. Unfortunately, most cities in the region do not have a plan to systematically identify at-risk affordable units and prevent these units from being converted to market-rate units. State law also does not allow local jurisdictions to take full RHNA credits for preserved units.

Conclusion

Staff's analysis of the Bay Area' multi-decade housing affordability shortfall has made it clear that, like most chronic problems, the region's shortage of housing cannot be solved with a single solution. Effectively moving the needle on housing affordability in a manner that expands housing choices, reduces displacement pressures on our most vulnerable citizens and strengthens the connection between transit, jobs and housing requires a multi-pronged strategy. The region must pursue a multi-pronged strategy that emphasizes the construction of new homes for all incomes, the protection of the region's most vulnerable households, and the need to advocate for the ability to pursue local and regional solutions.

⁷ See: <http://chpc.net/services/preservation-of-at-risk-housing/>. See also: http://planbayarea.org/pdf/prosperity/Reconnecting_America_Preserving_Affordable_Housing_Near_Transit.pdf

MTC Land-Use Initiatives: 1997-2016



Attachment C: Transportation Focus: Bay Bridge Core Capacity Project Problem Statement

Auto demand on the San Francisco-Oakland Bay Bridge exceeds vehicle capacity. With future population and job growth, congestion will only worsen over time. But we can move many more people in the same number of vehicles that exist today, making better use of the bridge's capacity by increasing the number of carpools, shuttles and buses traversing the bridge corridor. Less than half of the seats are currently filled by passengers so carpooling alone could potentially double person throughput. Traffic operational improvements that reduce time spent in congestion compared to driving alone will make carpooling and transit more attractive. Furthermore, operational improvements that are implemented relatively quickly and at a low cost can be very effective in relieving congestion and increasing core capacity within the Bay Bridge corridor.

Bay Bridge Core Capacity Project: \$40 Million Investment Package

Operational Strategy	Near-Term Operational Improvement	Cost* (\$M)
Implement HOV improvements	1. West Grand Ave. HOV/Bus Only Lane: Convert shoulder of West Grand Ave. on-ramp to Bus/HOV only lane to provide direct access to the I-80 Bus/HOV ramp on the right side of the toll plaza	\$ 7
	2. Sterling Street On-Ramp Express Lane: Convert on-ramp HOV lane to express lane and add occupancy detection technology to support CHP enforcement to provide time savings that attracts more carpooling during evening eastbound peaks	\$10
	3. Casual Carpooling: Establish casual carpooling pick-up locations at key locations in San Francisco and Oakland	\$ 1
	4. Bridge Corridor Management Technologies: Implement a suite of technology improvements – such as cameras, traffic detection loops, occupancy detection and signs – to operate and manage the Bay Bridge and its approaches from I-80, I-580, and I-880 as a unified network	\$ 2
Improve transit core capacity	5. Higher-Capacity Express Bus Fleets: Purchase double-decked buses to operate on most productive Transbay express bus routes for AC Transit and WestCat	\$ 7
	6. Pilot Express Bus Routes: Pilot new AC Transit Transbay routes to serve high demand inner East Bay markets	\$ 6
	7. Transit-Focused Arterial Operational Improvements: Improve arterial operations through adaptive signals and transit signal priorities technology to improve bus speed and reliability	\$ 1
	8. Commuter Parking: Establish commuter parking facilities in East Bay to encourage carpool and express bus ridership	\$ 5
Facilitate shared mobility	9. Vanpooling: Provide increased vanpooling opportunities in the Bay Bridge corridor	\$ 0.2
	10. Flexible, On-Demand Transit: Provide on-demand transit services between East Bay and San Francisco core and beyond	\$ 0.8
	11. Shared Mobility: Private companies such as Lyft, Scoop, Carma, Uber, RidePal, etc. to provide carpooling, vanpooling, shuttles, and buses, taking advantage of the bridge corridor operational and infrastructure improvements	\$ 0

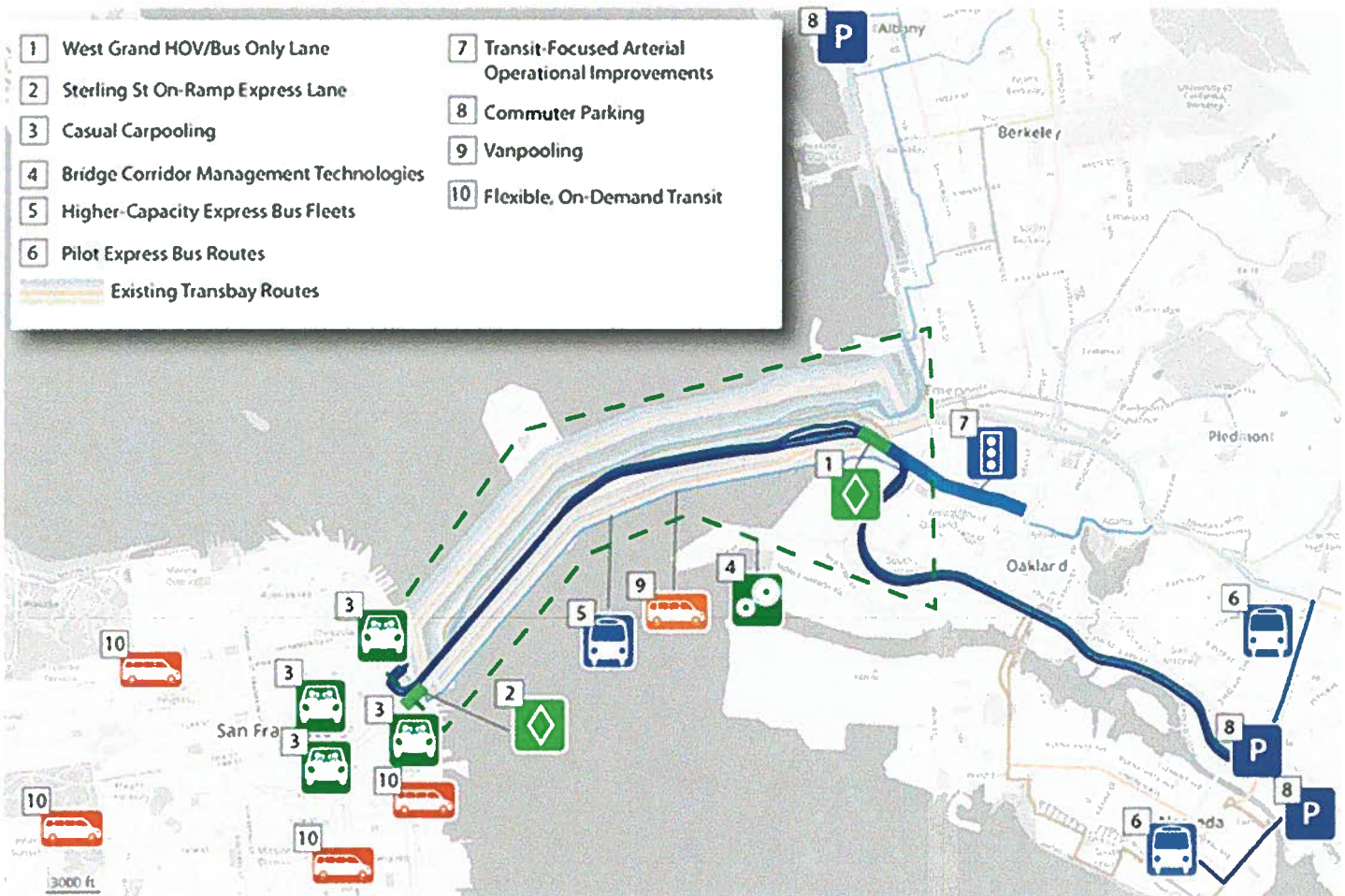
*Preliminary estimates subject to further refinement

Total: \$ 40 M

Core Capacity Guiding Principles

- ★ Moving more people in the same number of vehicles between San Francisco and the East Bay will result in more efficient operations and greater person throughput within the Bay Bridge corridor
- ★ Operational improvements designed to offer travel time savings and ease of access to carpooling and transit use will effectively encourage and support adoption of those modes
- ★ Regional investments that improve core capacity within the Bay Bridge corridor should be taken advantage of by public and private service providers alike, such as public transit operators and shared mobility companies that are releasing new services focused on carpooling

Bay Bridge Core Capacity Project



Other Opportunities. In 2010, congestion pricing was implemented, charging \$2.50 for carpools and \$6 for all others during peak periods. As part of a potential Regional Measure 3, there may be an opportunity to reduce the HOV toll rate to create a greater differential between carpool and non-HOV toll rates to provide greater incentives to take transit or carpool.

Attachment D: Short-term Housing Initiatives

1. Reward Cities and Counties: One Bay Area Grant (OBAG) Program

Example: From 2015-19, a local jurisdiction has issued permits to about 60% of its allocation for low- and moderate-income units in its PDA. This program rewards the top 20 jurisdictions based on affordable units permitted between 2015 and 2019. The jurisdiction becomes automatically eligible for additional FAST Act transportation funds. Table 1 illustrates what a distribution would have looked like for the period from 2007-2014. The proposed program would be prospective and therefore distribution amounts are not yet known.

Structure: MTC would set aside a portion or all of the additional revenue received through the FAST Act for a “bonus” program that rewards local jurisdictions that have permitted a significant share (threshold TBD) of their RHNA allocations in Priority Development Areas.

The Bay Area has permitted only about a third of all very low, low and moderate income RHNA allocations over the last 2 cycles. This program is intended to encourage jurisdictions in the Bay Area to permit new homes near transit and jobs and reward them with transportation funds. The local jurisdiction may count accessory dwelling units, micro units, and pre-fabricated dwellings toward their numbers, even if these units do not qualify for RHNA for some reason.

Leverage: While the amount of “bonus” funds awarded may be limited, local jurisdictions would be eligible for them only if they permitted a significant number of affordable housing units.

Table 1. Illustration of Possible Distribution for 2007-2014 Permitting Low and Moderate Housing

Jurisdiction	Low & Moderate Income Units	Rank	Possible FAST Bonus
San Francisco	6,635	1	\$ 18,427,712
San Jose	2,956	2	\$ 8,209,844
Sunnyvale	2,178	3	\$ 6,049,067
Oakland	1,689	4	\$ 4,690,943
Santa Rosa	1,450	5	\$ 4,027,156
Oakley	1,307	6	\$ 3,629,995
San Leandro	973	7	\$ 2,702,361
Pittsburg	871	8	\$ 2,419,071
Antioch	862	9	\$ 2,394,075
Alameda Co	763	10	\$ 2,119,117
San Ramon	753	11	\$ 2,091,344
Vacaville	746	12	\$ 2,071,902
Santa Clara	721	13	\$ 2,002,469
Milpitas	709	14	\$ 1,969,141
Rio Vista	662	15	\$ 1,838,605
Santa Clara Co	620	16	\$ 1,721,956
San Bruno	596	17	\$ 1,655,300
Fremont	492	18	\$ 1,366,456
Contra Costa Co	471	19	\$ 1,308,131
Richmond	470	20	\$ 1,305,354
TOTAL	25,924		\$ 72,000,000

2. Direct Investment: Naturally Occurring Affordable Housing (NOAH) Pilot Program

Example: The owner of a 28-unit apartment building, which is located in a transit-accessible neighborhood experiencing rising rents, is selling the entire property. Among many potential buyers is a non-profit housing organization (NPHO) that wants to purchase the building, bring it up to code, and protect it as deed-restricted affordable housing for households earning less than 120% AMI. The NPHO is able to secure a low-interest loan through the NOAH program to purchase the property and keep it affordable for the long-term.

Structure: MTC would provide low-interest revolving loans to non-profit housing entities to purchase, rehabilitate and protect market-rate units as permanently affordable units for low- and moderate-income renters. The program would also be available to extend expiring protections on currently deed-restricted units and for major rehab.

Leverage: Potentially significant. The NOAH program is estimated to leverage from 3:1 to 7:1 times MTC's investment, depending on location, building type, and the availability of other funds. Acquisition, rehabilitation and protection is also a more cost-effective strategy compared to just building new affordable units. Total units preserved range from approximately 200 at 3:1 leverage up to roughly 2,000 for a \$72 million investment at 7:1.

3. Regulation: Conditioning OBAG Funding

Example: A city permitted over 50% of its low and moderate income RHNA from 1999-2014 and has over 10% of its housing affordable to low-wage workers. Based on this analysis, the city is eligible for additional OBAG funding since it already has a certified housing element and a complete streets resolution consistent with adopted Commission policy.

Structure: Based on an assessment of each city and county's displacement risk, low-income worker in-commuting, past RHNA performance and the current affordability of the community, some cities would be required to develop a Neighborhood Stability and Affordability Plan that complements their adopted housing policies to increase city/countywide affordability. Cities and counties meeting RHNA performance and/or current level of affordability would not be required to take any additional actions to be eligible for additional FAST funds.

MTC currently requires cities and counties seeking OBAG funding to have a certified housing element. Housing elements, however, do not require cities to approve zoning applications and in turn to produce housing to ensure affordability for a share of their residents. Housing elements also do not require a response to rapid rent escalations that most Bay Area cities and counties are experiencing.

Leverage: This approach is intended to increase short and long-term affordability in all cities seeking OBAG funding. This approach does not condition the release of FAST funds to jurisdictions based on a menu of adopted housing policies as presented by the Six Wins Coalition in fall 2015. Instead the process identifies communities with an above average displacement risk or high cost of housing and has them develop a response based on their community's needs.

Attachment E: Medium-Term Initiatives

1. Within Existing Authority

A. Infrastructure Finance Fund (IF2)

Example: A 72-unit, mixed-income housing project with 20% affordable units at 80% AMI has secured a majority of its funding and financing. But it lacks equity to secure that extra funding for off-site infrastructure investments and tax credits. Fortunately, the local jurisdiction can secure an \$8 million low-interest infrastructure financing package via the IF2 to bridge this gap. The project now “pencils out.”

Structure: Using BATA’s approved investment policy, the IF2 program would invest in instruments that provide low-interest infrastructure loans in relation to infill projects that are consistent with Plan Bay Area – TOD projects encompassing affordable housing in high-priority PDAs.

Applicability: The IF2 program would provide gap financing for transportation-related infrastructure associated with housing developments with a sizable affordability component in high-priority PDAs that would otherwise fail to “pencil out” due to high off-site infrastructure improvement costs.

Senior staff at the cities of San Jose, Oakland and affordable and market-rate housing developers have indicated that the lack of such low-cost infrastructure financing is a key barrier to housing development ever since redevelopment agencies were eliminated.

IF2 could be used as a “but for” funding for infrastructure improvements tied to new housing developments (including streetscape improvements, sewer/water infrastructure, bicycle/pedestrian improvements, etc.).

Low-interest infrastructure financing could be a “game-changer,” especially in emerging transit-accessible PDAs in the East Bay and North Bay.

Leverage: Significant. The IF2 will make projects more attractive for financing to other lenders and if structured appropriately could serve as the local match for tax credits and other programs.

Proposed MTC Funding Source: BATA funds, guided by BATA’s approved investment policy.

Legislation Required: None

Potential Impact: Significant. If of a sizable amount, even this one-time investment can jump start numerous projects in PDAs.

2. Outside Existing Authority

B. Regional Jobs-Housing Linkage Fee

<i>Example:</i>	<p>A company is building its new facility in a location with limited transit access and where the number of existing jobs far outnumber existing housing units. Most workers in this sub-region already commute long distances by car resulting in a high level of VMT per capita.</p> <p>Irrespective of any development or impact fee charged by the local jurisdiction to the firm, the employer pays a regional jobs-housing linkage fee of \$5000 per employee to mitigate regional transportation impacts caused by adding 2,000 new workers in a “location-inefficient” zone that will significantly increase total VMT and GHG.</p>
<i>Structure:</i>	<p>The jobs-housing linkage fee would be based on a nexus study utilizing MTC’s travel model that estimates vehicle-related GHG emissions based upon geographic location. A portion of the funding would support demand management programs to reduce VMT and GHGs in the area where commercial development is occurring, and a portion would support affordable housing for low- and moderate-income households in high-priority PDAs.</p> <p>The jobs-housing linkage fee program is similar in design to the state’s Cap and Trade Program that is designed to charge a fee for emitting GHGs, and in turn invests these revenues in programs that reduce emissions.</p>
<i>Applicability:</i>	<p>This fee program would apply to any new commercial development of a certain size (threshold to be determined) anywhere in the nine-county region. It would not be applicable to housing developments.</p> <p>The fee program would directly address the housing and transportation impacts of new, regionally significant commercial development, without affecting local control over land use and development decisions. The fee program would also provide a mechanism for large employers and businesses to participate in solving the region’s housing and transportation crisis.</p> <p>Lastly, the fee program will encourage “location efficient” uses by providing for some leveling of the playing field between high-VMT zones (that have a skewed jobs-housing ratio) and low-priced and low-VMT zones (that are well served by transit, and have a better balance between jobs and housing) leading to a better fit between jobs and housing in the region over time.</p>
<i>Leverage:</i>	<p>Very Significant. The fee program would provide a significant new source of regional funding for workforce housing in “location-efficient” zones as well as transportation projects that serve these locations. It will also provide an effective tool to advance Plan Bay Area implementation.</p>
<i>Legislation Required</i>	<p>State legislation would be needed to provide the legal and regulatory basis for establishing the fee program.</p>
<i>Potential Impact:</i>	<p>Very Significant. The jobs-housing linkage fee program could be a potential “game changer,” which not only raises new revenue for needed housing and transportation investments but also promotes a more “location efficient” land use pattern without weakening local land use authority.</p>

C. Regional Housing Bond/Fee and Trust Fund

- Example:* A local jurisdiction has purchased a parcel that can accommodate 65 rental units for households that earn less than 80% of the county AMI. The parcel is within a PDA and provides regional transit connections to multiple job centers. Unfortunately, the affordable housing developer has struggled to secure adequate subsidies for the project. The developer is short by \$6 million.
- The Regional Housing Trust Fund has raised \$700 million via a multi-county housing bond and pooled \$26 million from eight local jurisdictions through their respective housing programs. The regional housing trust fund entity allocates \$6 million to the project.
- Structure:* A regional entity, potentially MTC, would establish a regional housing trust fund that collects or aggregates revenue from existing inclusionary programs or other fee programs for affordable housing construction in transit-accessible locations. It would also raise funds via bond or fee with voter approval after securing needed state legislation to enable this function to address the \$1+ billion affordable housing shortfall.
- The approach will complement county housing bonds that have passed or are under development to substantially grow the pool of available funding for housing. For example, a regional 1/8 cent sales tax would generate almost \$200 million annually for housing in the Bay Area; a \$25 parcel tax could generate \$1 billion; a \$75 real estate recording fee based on AB 1335 could generate almost \$200 million annually.
- Applicability:* Many small- to medium-sized jurisdictions in the Bay Area require market rate housing developers to pay an inclusionary housing fee, which then funds low- and moderate-income housing construction. However, regardless of size, most local jurisdictions have not been able to approve over 50% of their RHNA.
- By aggregating these funds across jurisdictions and raising new funds, a regional housing trust fund can put these collected fees to use more readily and dramatically increase affordable housing funding. The trust fund could pool resources for a single project, or provide gap funding to multiple projects within the same county.
- Leverage:* Significant. Not only would the trust fund pool existing funding across multiple jurisdictions to fund affordable housing projects, but it could provide the mechanism for collecting new revenues through the Value Capture and Jobs-Housing Linkage Fee programs.
- Legislation Required:* Yes, MTC and participating cities / counties would need to seek state legislation to establish and operate a regional housing trust fund. Additional MOUs may be needed with each county.
- Potential Impact:* Substantial. With additional sources of funding of regular funding, the trust fund can make an immediate impact of financing more housing.