

## Attachment B: Scope of Work

### SCOPE OF WORK

#### Central Subway – Phase 3 Concept Study

#### **Background**

The T-Third Light Rail Transit (LRT) line opened in April 2007 as the first new rail line in the eastern part of San Francisco in over 50 years. The new rail line extended 5.1 miles from the San Francisco County Line near Visitacion Valley to the Caltrain Station at 4th and King Streets. Phase 2 of T-Line will extend the line from 4th and King Streets to Stockton and Clay Streets in Chinatown. The 1.5 billion, 1.7 mile long extension will include four new stations and address transit need and congestion in a busy north-south corridor in the heart of downtown San Francisco. Phase 2 has received a full funding grant agreement (FFGA) from the Federal Transit Administration (FTA). The extension is expected to open for service in 2019. The actual Phase 2 construction will reach into North Beach where the tunnel boring machines will be removed from the ground at the intersection of Powell Street, Columbus Avenue and Union Street (Pagoda Palace site).

#### **Study Objectives**

The Central Subway – Phase 3 Concept Study (“Concept Study”) will analyze at a high-level the potential feasibility, benefits, and issues of extension of the T-Third LRT line from Chinatown (the northernmost station of Phase 2) through North Beach and Russian Hill to Fisherman’s Wharf. Up to three possible alignments will be examined as a part of the Concept Study.

The Concept Study will be a multi-agency effort led by the San Francisco Municipal Transportation Agency (SFMTA) with input from San Francisco County Transportation Authority (SFCTA), the Department of City Planning, Office of Economic WorkForce Development (OEWD) and the Department of Public Works (DPW).

The report will focus on feasibility with respect to the following items key areas:

- Alignment
- Grade Options
- Construction Methods
- Land Use & Economic Development
- Transit & Traffic Analysis
- Costs & Funding

The following table outlines the key focus areas that will be addressed with initial preferred action, but may change as more information is gathered.

#### **Task Summary**

1. Administration and Ongoing Management
2. Planning Goals
3. Transportation Analysis
4. Land Use and Economic Conditions Analysis
5. Constructability Analysis
6. Costs, Funding, and Next Steps
7. Final Report

**1. Administration and Ongoing Management**

**Task 1.1:** Finalize Concept Study scope, agency roles, consultant roles, and tentative schedule among the SFMTA, SFCTA, and SF Planning and applicable on-call consultant services. Execute project charter among the three agencies to finalize roles, responsibilities and procedures. Establish planning goals and study outline.

- SFCTA will manage the distribution of funds, lead the transportation modeling and FTA New Starts ratings calculations, and assist with transportation analysis.
- SF Planning will write the scope of work for the economic development consultant task order and lead the analysis of land use and economic development.
- SFMTA will lead and manage the overall project and be responsible for all final deliverables.

**Task 1.2:** SFMTA will convene regular project meetings (once a month or more based on deliverables) with key staff from SFMTA, SF Planning, and SFCTA. SFMTA will create and distribute agendas prior to meetings and distribute notes and action items via email following meetings.

<b>Task</b>	<b>Deliverables</b>	<b>Documentation</b>	<b>Roles</b>
1.1	<ul style="list-style-type: none"> <li>• Final Scope</li> <li>• Project Charter</li> <li>• Executed Consultant Task Orders</li> <li>• Concept Study outline</li> </ul>	Documents themselves	<ul style="list-style-type: none"> <li>• SFMTA will lead scope finalizing and project charter, with SF Planning and SFCTA participating</li> <li>• SFMTA will lead the Concept Study outline, with SF Planning and SFCTA participating and reviewing</li> <li>• SF Planning will create a consultant task order scope for the economic development</li> <li>• SFCTA will execute consultant task orders</li> </ul>
1.2	<ul style="list-style-type: none"> <li>• Management meetings</li> </ul>	Meeting agendas, notes, and action items.	<ul style="list-style-type: none"> <li>• SFMTA to schedule meetings, create and distribute meeting agendas and record and distribute notes and action items to SFCTA, and SF Planning</li> <li>• SFCTA, SFMTA, and SF Planning will attend meetings</li> </ul>

**2. Transportation Analysis**

**Task 2.1:** SFMTA will summarize existing and currently planned transit service and traffic conditions that are projected to be present in the project area (North Beach, Russian Hill, Telegraph Hill, Fisherman’s Wharf) upon completion of Phase 2 of the T-Third LRT line. The summary will include service and frequencies of transit service (including any proposed changes from the Transit Effectiveness Project), transit facilities (i.e. transit only lanes), and street network configurations for automobiles and non-motorized travel.

**Task 2.2:** SFMTA will evaluate issues present concerning the addition of a new station in the North

Beach area at the site of the Pagoda Palace or in the immediate vicinity.

**Task 2.3:** SFMTA will summarize conceptual alignment and station options for a Phase 3 extension of the Central Subway north of the existing line end at the intersection of Powell Street, Columbus Avenue and Union Street. This summary will include discussion of potential nexus opportunities with other transportation and public realm plans (i.e. Conrad Square). In addition, it will document the relative size and service quality (i.e. crowding levels, congestion, wait time, speed) of the travel markets that various alignments and station options would serve (i.e. tourists, convention attendees, residents, workers). This section will also document any communities of concern and location of populations with unique travel needs (i.e. zero auto and low income households).

**Task 2.4:** SFCTA will develop preliminary travel ridership projections for the Phase 3 extension based on a representative land use and service plan scenario. These projections will drive a high-level analysis of New Starts competitiveness.

Task	Deliverables	Documentation	Roles
2.1	Summary of existing transit service and traffic conditions (post Phase 2 completion )	Section in Concept Study report.	SFMTA will lead task, SFCTA and SF Planning will review.
2.2	Summary of issues concerning a North Beach station	Section in Concept Study report.	SFMTA will lead task, SFCTA and SF Planning will review.
2.3	Summary of conceptual alignment options	Section in Concept Study report.	SFMTA will lead task, SFCTA and SF Planning will review.
2.4	Preliminary Ridership Forecasts	Section in Concept Study report.	SFCTA will lead task, SFMTA and SF Planning will review.

### **3. Land Use and Economic Conditions Analysis**

**Task 3.1:** SF Planning will summarize existing and future land use conditions within the project area. Future conditions will both assume an “existing conditions” scenario without a Phase 3 Central Subway extension, and a build scenario with a Phase 3 Central Subway extension.

**Task 3.2:** SF Planning will summarize existing and future conditions within the project area with an emphasis on topography of the project area.

**Task 3.3:** SF Planning with consultant support will summarize existing and future conditions for economic conditions within the project area. Future conditions will assume an “existing conditions” scenario without a Phase 3 Central Subway extension, and a build scenario with a Phase 3 Central Subway extension. This analysis will include the role of various travel markets that Phase 3 would serve in supporting our economy (i.e. visitors, and large employers).

Task	Deliverables	Documentation	Roles
3.1	Summary of existing and future land use conditions within the project area.	Section in Concept Study report.	SF Planning to lead, SFMTA and SFCTA to review.
3.2	Summary of existing and	Section in Concept	SF Planning to lead,

	future land forms (topography) within the project area	Study report.	SFMTA and SFCTA to review.
3.3	Summary of existing and future economic conditions	Section in Concept Study report.	Consultant-led task, managed by SF Planning, with SFMTA and SFCTA review.

#### **4. Constructability Analysis**

The Concept Study will evaluate the constructability of various horizontal and vertical alignments and station locations with regards to geotechnical conditions, construction methods, sea level rise vulnerability, major utility conflicts and construction costs.

**Task 4.1:** The SFMTA with consultant support will evaluate preliminary alignment profiles based on existing geotechnical information

**Task 4.2:** The SFMTA with consultant support will discuss feasibility and recommendation of construction method for the alignments

**Task 4.3:** The SFMTA will identify potential major utility conflicts based on existing information

**Task 4.4:** The SFMTA with consultant support will conduct a risk analysis with regards to sea level change

**Task 4.5:** The SFMTA with consultant support will prepare a preliminary construction cost estimate

<b>Task</b>	<b>Deliverables</b>	<b>Documentation</b>	<b>Roles</b>
4.1	Geotechnical assessment	Section in Concept Study report.	Consultant-led task with management by SFMTA, SFCTA review.
4.2	Construction method feasibility	Section in Concept Study report.	Consultant-led task with management by SFMTA, SFCTA review.
4.3	Identification of potential major utility conflicts	Section in Concept Study report.	SFMTA lead, SFCTA review.
4.4	Risk analysis with regards to sea level change	Section in Concept Study report.	Consultant-led task with management by SFMTA, SFCTA review.
4.5	Preliminary construction cost estimate	Section in Concept Study report.	Consultant-led task with management by SFMTA, SFCTA review.

#### **5. Costs, Funding and Next Steps**

**Task 5.1:** The SFMTA will use the results of Task 4.5 to perform high-level project-level cost estimates

for promising options and summarize findings.

**Task 5.2:** The SFMTA will perform an initial analysis of existing and future public and public/private funding sources including but not limited to development contributions, tax increment and other funding opportunities from potential land-use zoning changes. The list of existing funding strategies will include but not be limited to federal New Starts funding, local sales tax funding, and other available local sources in addition to the private contributions from potential land-use changes. SFCTA will perform a high-level calculation of a potential New Starts rating based on results from the transportation ridership analysis in Task 2.

**Task 5.3:** The SFMTA will document potential next steps and agency responsibilities for Central Subway Phase 3. The Concept Study will reference the SFMTA Rail Capacity Improvement Strategy to develop a citywide rail transit optimization and expansion assessment during 2014 that will be the successor to the “Four Corridors Plan” adopted in 1995.

<b>Task</b>	<b>Deliverables</b>	<b>Documentation</b>	<b>Roles</b>
5.1	Summary of high-level cost estimates	Section in Concept Study report.	SFMTA to lead, SFCTA to review.
5.2	Summary of existing funding sources	Section in Concept Study report.	SFMTA to lead; SFCTA will develop New Starts ratings; SF Planning will develop funding potential from land use strategies.
5.3	Outline next steps and responsibilities.	Section in Concept Study report.	SFMTA to lead, SFCTA and SF Planning to review.

## **6. Final Report**

**Task 6.1:** SFMTA will draft a final report summarizing all relevant information, findings and conclusions and information will be developed in the several deliverables listed in this scope of work summary.

**Task 6.2:** SFMTA will produce a presentation summarizing the Report’s findings and recommendations. This presentation may be used for public outreach, presentation to policy boards and executive staff, and other uses as needed.

<b>Task</b>	<b>Deliverables</b>	<b>Documentation</b>	<b>Roles</b>
6.1	Final Report	Final report document	SFMTA to lead, SF Planning and SFCTA to review.
6.2	Final Report Presentation	Final report slide deck	SFMTA to lead, SF Planning and SFCTA to review.

### Central Subway Phase 3 - Concept Study - SFMTA

	SFMTA Task Subtotal	Transit Planner IV
Hourly Rates		\$ 164
1 Administration and Ongoing Management	\$ 4,100	25
2 Transportation Analysis	\$ 16,400	100
3 Land Use Analysis	\$ 984	6
4 Constructability Analysis	\$ 4,920	30
5 Costs, Funding, and Next Steps	\$ 3,936	24
7 Final Report	\$ 9,840	60
Hours	245	245
Cost	\$ 40,180	\$ 40,180

### Central Subway Phase 3 - Concept Study - SF Planning

	SF Planning Task Subtotal	Planner III
Hourly Rates		\$ 145
1 Administration and Ongoing Management	\$ 1,740	12
3 Transportation Analysis	\$ 870	6
4 Land Use and Economic Analysis	\$ 26,825	185
5 Constructability Analysis	\$ 290	2
5 Costs, Funding, and Next Steps	\$ 2,175	15
6 Final Report	\$ 3,045	21
Sub-Total -- Hours	241	241
Sub-Total - Cost	\$ 34,945	

### Central Subway Phase 3 - Concept Study SFCTA

	SFCTA Task Subtotal	Transp. Planner	Sr. Transp. Planner	Deputy Director	Intern	Contract Admin.
Hourly Rates		\$ 59	\$ 69	\$ 115	\$ 35	\$64
1 Administration and Ongoing Management	\$ 8,286		4	14		100
2 Analysis of Transportation Alternatives	\$ 7,074	50	16	8	60	
3 Land use Analysis	\$ 230			2		
4 Constructability Analysis	\$ 690			6		
5 Costs, Funding, and Next Steps	\$ 1,012		8	4		
6 Final Report	\$ 795	1	4	4		
Sub-Total -- Hours	281	51	32	38	60	100
Sub-Total - Cost	\$ 18,087	\$ 3,009	\$ 2,208	\$ 4,370	\$ 2,100	\$ 6,400

### Central Subway Phase 3 - Concept Study - Consultant

	Consultant Task Subtotal
Hourly Rates	
1 Administration and Ongoing Management	
2 Transportation Analysis	
3 Land Use and Economic Analysis	\$ 30,000
4 Constructability Analysis	\$ 50,000
5 Costs, Funding, and Next Steps	
6 Final Report	
Sub-Total - Cost	\$ 80,000