Orientation to the Expenditure Plan Advisory Committee (EPAC)

Optional Introduction Workshop/Meeting

San Francisco County Transportation Authority

August 19, 2021
1. Welcome & Introductions
2. Public Comment
3. Introduction to the Transportation Authority
4. EPAC Purpose and Process
5. Transportation Funding Basics
Using Zoom

EPAC members: Update your name and follow with “EPAC”

e.g. Michelle Beaulieu, EPAC

Having Trouble?

Send chat (Chats only go to project team.)
Agenda Item 1.

Welcome & Introductions
Introductions

Project Staff

EPAC members: please state your name and organization when called upon

If on a computer, press UNMUTE

If on phone:

*6 to unmute
Agenda Item 2.

Public Comment
Please raise your hand:

Computer: press REACTIONS, and choose Raise Hand

Phone: dial *9

Once called on, unmute yourself:

Computer: choose UNMUTE

Phone: dial *6
Agenda Item 3.
Introduction to the Transportation Authority
Transportation Authority roles

Plan | We lead a range of transportation planning efforts for San Francisco

Fund | We fund projects to improve transit, reduce congestion, and increase street safety

Deliver | We provide support and oversight and deliver certain capital projects
Relationship to SFMTA

SFMTA
- City Department of Transportation + Transit Operator (Muni) + Taxi Regulator
- 7-member Board, appointed by Mayor

SFCTA
- Sales Tax/Other Revenues Administrator + Congestion Management Agency + Countywide Transportation Plan lead
- 11-member Board, independent of City

Regional and Local Trips to Downtown SFCTA, 2019

- San Francisco: 75% (417,500 trips)
- North Bay: 3% (22,000 trips)
- South Bay: 10% (56,700 trips)
- East Bay: 12% (65,500 trips)
Voter-Approved Sales Tax History

Proposition B, 1989
- Established the Transportation Authority
- Put in place a ½ cent sales tax for transportation
- Approved a 20-year expenditure plan

Proposition K, 2003
- Superseded Prop B
- Approved a new 30-year expenditure plan for the same ½ cent sales tax

Proposition ??, 2022
- Would supersede Prop K
- Would approve a new 30-year expenditure plan for the same ½ cent sales tax

Dedicated transportation sales taxes require 2/3s voter approval
A sales tax expenditure plan tells voters how the sales tax funds will be spent, who can receive the funds, and how the program will be administered.
What does it do?

- Identifies eligible project types
- Identifies eligible project sponsors
- Sets maximum amount of sales tax funding for each program/project
- Allows for financing
- Establishes other administration requirements
Other administration requirements include:

- Development of a Strategic Plan, a 30-year financial plan for the sales tax
- Prioritization process to identify projects to fund
Expenditure Plan Programs & Projects

Most of the Expenditure Plan is composed of programs to be flexible over 30 years.

- Prop K examples: traffic calming, transit vehicle replacement, street resurfacing

There are relatively few named projects.

- Prop K examples: Central Subway, Caltrain Electrification, Presidio Parkway
Most of the Prop K Expenditure Plan is made up of programs, with a few named projects.

65.5% TRANSIT
- Muni, BART, Caltrain, Ferries
- New vehicles
- Station, facility, rail and other upgrades
- Bus Rapid Transit
- Major Capital Projects

8.6% PARATRANSIT
- Paratransit service
- Shopper Shuttle
- Van Gogh Shuttle

24.6% STREETS AND TRAFFIC SAFETY
- New and upgraded signals
- Traffic calming
- Pedestrian and bicycle safety
- Street resurfacing
- Arterial upgrades
- Presidio Parkway

1.3% TRANSPORTATION SYSTEMS MANAGEMENT / STRATEGIC INITIATIVES
- Neighborhood and citywide transportation planning
- Transportation Demand Management
Prop K Sales Tax: Highlights

• Muni Reliability Improvements
• Caltrain Electrification
• Safe Routes to School
• Bicycle Safety and Circulation
Prop K Sales Tax: Highlights

Nearly $2 billion allocated as of August 2021

Transparency & Accountability

- AAA credit rating
- Annual independent audits
- Publicly noticed Community Advisory Committee and Transportation Authority Board meetings

Leveraging

- Prop K funds provide local match to federal, state, and other local funds
- Each Prop K dollar on average leverages $4 to $7 in other funds

Financing

- Program balances minimizing financing costs with willingness to issue debt to deliver projects sooner
SALES TAX STORIES

See how sales tax dollars improve the city's transportation system.

Click on a face to see how people across San Francisco benefit from the half-cent sales tax for transportation.

The San Francisco County Transportation Authority has managed the voter-approved, half-cent sales tax since 1990.
Sales Tax Investments

MyStreet SF

Look up nearly 1,000 active and completed projects funded by or overseen by the SFCTA (e.g. in our role as sales tax administrator)

Look at projects in your district, by travel mode (bike, walk), by sponsor, etc.

MyStreetSF can be accessed at: www.sfcta.org/mystreetsf-map
Conversation with EPAC members

Do you have any questions about the Transportation Authority?

Do you have any questions about the San Francisco transportation sales tax?

Do you have any questions about what an expenditure plan does?
Agenda Item 4.
Expenditure Plan Advisory Committee (EPAC)
Purpose and Process
To recommend that the Transportation Authority Board approve a new Expenditure Plan for the ongoing sales tax for transportation and place it on the ballot (anticipated June 2022).
<table>
<thead>
<tr>
<th>EPAC Category</th>
<th>EPAC Member</th>
<th>District</th>
<th>Organization (if applicable)</th>
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<tbody>
<tr>
<td>Equity Priority Community: Bayview</td>
<td>Earl Shaddix</td>
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<td>EDoT Bayview</td>
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<td>Equity Priority Community: Tenderloin</td>
<td>Eric Rozell</td>
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<td>Tenderloin Traffic Safety Task Force</td>
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<td>Equity Priority Community: Chinatown</td>
<td>Rosa Chen</td>
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<td>Chinatown Community Development Center</td>
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<td>Equity Priority Community: Visitacion Valley</td>
<td>Susan Murphy, alternate: Melvin Parham</td>
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<td>FACES SF</td>
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<td>Equity Priority Community: Mission District</td>
<td>Yensing Sihapanya</td>
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<td>Equity Priority Community: Excelsior / Outer Mission</td>
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<td>Equity Priority Community: Ingleside</td>
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<td>Equity Priority Community: Western Addition</td>
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## EPAC Roster, page 2 of 4

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<th>EPAC Category</th>
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<tr>
<td>Neighborhoods/Communities</td>
<td>Aaron P. Leifer</td>
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<td>David Hoppe</td>
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<td>Jay Bain</td>
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<td>Neighborhoods/Communities</td>
<td>Joan Van Rijn</td>
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<td>Community Living Campaign</td>
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<td>Neighborhoods/Communities</td>
<td>Maelig Morvan</td>
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<td>Advocacy: Environment</td>
<td>Amandeep Jawa</td>
<td>League of Conservation Voters</td>
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<td>Advocacy: Seniors and People with Disabilities</td>
<td>Anni Chung</td>
<td>Self Help for the Elderly</td>
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<td>Advocacy: Youth</td>
<td>Calvin Quick, alternate: Sasha Hirji</td>
<td>San Francisco Youth Commission</td>
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<td>Advocacy: Walk Mode</td>
<td>Jodie Medeiros</td>
<td>Walk San Francisco</td>
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<td>Advocacy: Seniors and People with Disabilities</td>
<td>Pi Ra</td>
<td>Senior and Disability Action</td>
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<td>Advocacy: Bike Mode</td>
<td>Chris White</td>
<td>San Francisco Bicycle Coalition</td>
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<td>Advocacy: Transit Mode</td>
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<td>Advocacy: Equity</td>
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<tr>
<td>Business &amp; Civic: Tourism &amp; Visitors</td>
<td>Jessica Lum, alternate: Cassandra Costello</td>
<td>The San Francisco Travel Association</td>
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<td>Business &amp; Civic: Labor</td>
<td>Kim Tavaglione</td>
<td>San Francisco Labor Council</td>
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<td>Business &amp; Civic: Small Businesses</td>
<td>Maryo Mogannam</td>
<td>San Francisco Council of District Merchants Associations</td>
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<td>Business &amp; Civic: Civic</td>
<td>Nick Josefowitz</td>
<td>SPUR</td>
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<td>Business &amp; Civic: Small Businesses</td>
<td>Sharky Laguana</td>
<td>San Francisco Small Business Commission</td>
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<td>Business &amp; Civic: Large Businesses</td>
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EPAC Meetings: What to expect

- EPAC Meeting will be publicly noticed
- Meeting agendas and materials will be distributed via email in advance and posted on our website
- Public comment will be taken at every meeting
- Meetings will be held virtually at least through the end of September
- Most meetings will include small breakout discussions and reports out
- Recaps and updates will be provided at the beginning of each meeting
- Staff from multiple agencies will be invited to make presentations
- Ultimately, there will be a vote on the Expenditure Plan
EPAC Meetings: What we expect

• Please make every effort to attend all meetings
• Bring the perspective of your community or organization to the discussions
• Hold one conversation at a time
• Be respectful of your colleagues on the EPAC and staff. No personal attacks – address the topic not the person
• Agenda items will be timed, and time limits will be strictly enforced in order to keep meetings to 2 hours
• If a topic warrants further discussion or investigation, we may arrange follow-up actions which may include distributing materials between meetings and/or reporting out at subsequent meetings
EPAC Meetings: Tentative Schedule

- Optional Meeting: Thursday August 19, 6-8pm
- Optional Meeting: Saturday August 28, 1-3pm
- Meeting #1: Thursday September 9, 6-8pm
- Meeting #2: Thursday September 23, 6-8pm
- Meeting #3: Thursday October 14, 6-8pm
- Meeting #4: Thursday October 28, 6-8pm
- Meeting #5: Thursday November 4, 6-8pm
- Meeting #6: Thursday November 18, 6-8pm
- Meeting #7: Thursday December 9, 6-8pm
### EPAC Meetings: Agenda Roadmap

<table>
<thead>
<tr>
<th>Meeting #</th>
<th>Agenda Topics (proposed, subject to change)</th>
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<tbody>
<tr>
<td>Optional Meetings</td>
<td>Introduction to the Transportation Authority Expenditure Plan Advisory Committee Purpose and Process Transportation Funding Basics</td>
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<tr>
<td>Meeting #1</td>
<td>Expenditure Plan Advisory Committee Purpose and Process Initial Draft Expenditure Plan Summary Equity Analysis and Outreach Plan Summary</td>
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| Meeting #2        | Maintaining our Transportation Systems  
|                   | • Local Streets and Roads  
|                   | • Transit (Muni BART Caltrain)  
|                   | Paratransit Operations |
| Meeting #3        | Enhancing and Expanding our Systems, Part 1  
|                   | • Street Safety and Accessibility  
|                   | • Freeway Safety and Operational Improvements  
<p>|                   | • Transformative Freeway Projects |</p>
<table>
<thead>
<tr>
<th>Meeting #</th>
<th>Agenda Topics (proposed, subject to change), continued</th>
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<tbody>
<tr>
<td>Meeting #4</td>
<td>Enhancing and Expanding our Systems, Part 2</td>
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<tr>
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<td>• Transit Reliability, Capacity and Expansion</td>
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<td>• Next Generation Transit Investments</td>
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<td>Expenditure Plan Policies, Part 1</td>
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<td>Meeting #5</td>
<td>Planning and Transportation Demand Management</td>
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<td>• Citywide and Modal Planning</td>
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<td>• Neighborhood Program</td>
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<td>• Equity Community Program</td>
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<td>• Development Oriented Transportation</td>
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<td>• Transportation Demand Management</td>
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<td>Expenditure Plan Policies, Part 2</td>
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<td>Meeting #6</td>
<td>Draft Final Expenditure Plan</td>
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<td>Meeting #7</td>
<td>Final Action: Recommendation to the SFCTA Board</td>
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ConnectSF: San Francisco Transportation Plan 2050

• Blueprint for San Francisco’s transportation system development and investment, integrating all modes and operators
• Updated every 4 years
• Builds on ConnectSF – a multi-agency process to build an effective, equitable and sustainable transportation system for San Francisco's future

Equity  Economic Vitality  Environmental Sustainability  Safety and Livability  Accountability and Engagement
ConnectSF: San Francisco Transportation Plan 2050

ConnectSF
Vision
Statement of Needs
Transit Corridors Study
Streets and Freeways Study

ConnectSF: SFTP 2050

Other Citywide Planning
e.g. Climate Action Strategy

Other Local, Regional, State Agency Plans
e.g. BART, Plan Bay Area 2050

Neighborhood and Community Planning
e.g. Bayview, Western Addition Community-Based Transportation Plans
Conversation with EPAC members

Do you have any questions about our proposed EPAC process and the goal of this committee?

Is there anything missing from this orientation that you would like to know?
Agenda Item 5.

Transportation Funding Basics
Transportation funding needs significantly outstrip available funds
Transportation Funding Basics

Funding that is available typically comes with restrictions or strings attached
Most projects rely on multiple fund sources
Local funding is crucial to fully funding transportation projects.
Transportation Project Phases

1. Planning/Conceptual Engineering
2. Environmental Studies
3. Design Engineering
4. Right of Way Activities/Acquisition
5. Construction or Procurement
Conversation with EPAC members

Do you have any questions about the role of local transportation funding?
Thank you.
Any Questions?

https://www.sfctta.org/ExpenditurePlan
expenditureplan@sfctta.org

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michelle.beaulieu@sfctta.org 415-522-4846