



**San Francisco  
County Transportation  
Authority**

1455 Market Street, 22ND Floor, San Francisco, California 94103 415-522-4800 info@sfcta.org www.sfcta.org

# AGENDA

## **Expenditure Plan Advisory Committee Meeting Notice**

**Date:** Thursday, September 23, 2021; 6:00 – 8:00 p.m.

**Location:** Join Zoom Meeting

<https://us02web.zoom.us/j/81789788686>

Meeting ID: 817 8978 8686

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### **Remote Access to Information and Participation:**

In accordance with Governor Gavin Newsom's statewide order for rolling back certain provisions of the Governor's COVID-19-related Executive Orders - video conferencing and teleconferencing exceptions to the Brown Act remain in effect until September 30, 2021. Pursuant to the lifted restrictions on video conferencing and teleconferencing, the Transportation Authority Expenditure Plan Advisory Committee Meetings will be convened remotely and allow for remote public comment. Members of the public are encouraged to stream the live meetings via Zoom.

Comment during the meeting: EPAC members and members of the public participating by Zoom wishing to speak should use the "raise hand" feature or dial \*9.



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Expenditure Plan Advisory Committee Meeting Agenda

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**Agenda**

<b>6:00</b>	<b>1.</b>	Roll Call	
<b>6:05</b>	<b>2.</b>	EPAC Chair's Remarks	
<b>6:10</b>	<b>3.</b>	Meeting #1 Recap, Minutes and Follow-ups - <b>INFORMATION*</b>	<b>9</b>
<b>6:15</b>	<b>4.</b>	Public Comment	<b>23</b>
		During this segment of the meeting, members of the public may make comments on items under the purview of the Expenditure Plan Advisory Committee that are not otherwise listed on this agenda as an action item. Public comment on action items on this agenda will be taken under those items.	
<b>6:25</b>	<b>5.</b>	Maintaining the System: Street Repaving and Bicycle & Pedestrian Facilities - <b>INFORMATION*</b>	<b>25</b>
<b>6:45</b>	<b>6.</b>	Maintaining the System: Muni, BART and Caltrain - <b>INFORMATION*</b>	<b>51</b>
<b>7:15</b>	<b>7.</b>	Paratransit - <b>INFORMATION*</b>	<b>81</b>
		<i>Break-out discussions on Items 5, 6, and 7, and report back</i>	
<b>8:00</b>	<b>8.</b>	Adjournment	

**\*Additional Materials**

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# Expenditure Plan Advisory Committee (EPAC)

## Meeting #2



San Francisco  
County Transportation  
Authority

September 23, 2021

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## Using Zoom

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**EPAC members: Update your name and follow with "EPAC"**

e.g. Michelle Beaulieu, EPAC

**Having Trouble?**

Send chat (Chats only go to project team.)



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# Agenda

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1. Roll Call
2. EPAC Chair's Remarks
3. Meeting #1 Recap, Minutes, and Follow-Ups
4. Public Comment
5. Maintaining the System: Street Repaving and Bicycle & Pedestrian Facilities
6. Maintaining the System: Muni, BART and Caltrain
7. Paratransit

*Breakout discussions and reports out*

8. Adjournment



San Francisco  
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# Agenda Item 1.

## Roll Call



**San Francisco  
County Transportation  
Authority**

September 23, 2021

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## Roll Call & Introductions

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**EPAC Members Roll Call:** please say “here” and give your organization when called upon

If on a computer, press UNMUTE

If on phone:

\*6 to unmute



San Francisco  
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# Agenda Item 2.

## EPAC Chair's Remarks



San Francisco  
County Transportation  
Authority

September 23, 2021

# Agenda Item 3.

## Meeting #1 Recap, Minutes & Follow-Ups



San Francisco  
County Transportation  
Authority

September 23, 2021

Table 1 - PRELIMINARY DRAFT New Transportation Sales Tax Expenditure Plan (EP)						
#	New EP Category - Subcategory - Program/Project			Eligible Agencies	EP Funding (2020 million\$*)	EP %**
	<b>A - Major Transit Projects</b>					<b>22.07%</b>
1		1	Muni Bus Reliability and Efficiency Improvements	SFMTA	\$100.00	4.19%
2		2	Muni Rail Core Capacity	SFMTA	\$57.00	2.39%
3		3	BART Core Capacity	BART	\$50.00	2.09%
4		4	Caltrain Service Vision: Capital System Capacity Investments	PCJPB	\$10.00	0.42%
5		5	Caltrain Downtown Rail Extension and Pennsylvania Alignment	TJPA SFCTA	\$310.00	12.98%
	<b>B - Transit Maintenance &amp; Enhancements</b>					<b>43.73%</b>
	<b>i. Maintenance, Rehabilitation and Replacement</b>					39.23%
6		1	Muni - Vehicles	SFMTA	\$458.05	19.18%
7		2	Muni - Facilities	SFMTA	\$94.09	3.94%
8		3	Muni - Guideways	SFMTA	\$258.88	10.84%
9		4	BART	BART	\$21.25	0.89%
10		5	Caltrain	PCJPB	\$100.06	4.19%
11		6	Ferry	GGBHTD Port of SF	\$4.54	0.19%
	<b>ii. Transit Enhancements</b>					4.50%
12		1	Transit Enhancements	BART PCJPB SFCTA SFMTA SFPW TIMMA	\$38.21	1.60%
13		2	BART Station Access, Safety and Capacity	BART SFCTA SFMTA SFPW	\$9.31	0.39%
14		3	New Bayview Caltrain Station	PCJPB SFCTA SFMTA	\$23.00	0.96%
15		4	Mission Bay Ferry Landing	Port of SF	\$7.00	0.29%
16		5	Next Generation Transit Investments	BART PCJPB SFCTA SFMTA	\$30.00	1.26%
17	<b>C - Paratransit</b>				\$205.38	<b>8.60%</b>
	<b>D - Streets and Freeways</b>					<b>18.44%</b>
	<b>i. Maintenance, Rehabilitation and Replacement</b>					5.14%
18		1	Street Resurfacing, Rehabilitation and Maintenance	SFPW	\$105.00	4.40%
19		2	Pedestrian and Bicycle Facilities Maintenance	SFMTA SFPW	\$17.67	0.74%
	<b>ii. Safe and Complete Streets</b>					11.50%
20		1	Safer Streets (signals, traffic calming, bikes and peds)	SFCTA SFMTA SFPW	\$226.87	9.50%
21		2	Curb Ramps	SFPW	\$23.88	1.00%
22		3	Tree Planting	SFPW	\$23.88	1.00%

			<b>iii. Freeway Safety and Operational Improvements</b>			1.80%
23		1	Vision Zero Ramps	Caltrans SFCTA SFMTA	\$8.00	0.33%
24		2	US-101/I-280 Managed Lanes and Express Bus	Caltrans SFCTA SFMTA	\$15.00	0.63%
25		3	Freeway Safety and Operational Improvements	Caltrans SFCTA SFMTA	\$5.00	0.21%
26		4	Transformative Freeway Projects	Caltrans Planning SFCTA SFMTA SFPW	\$15.00	0.63%
<b>E - Transportation System Development &amp; Management</b>						<b>6.70%</b>
27		<b>i. Transportation Demand Management</b>		BART PCJPB Planning SFCTA SFE SFMTA TIMMA	\$30.00	1.26%
		<b>ii. Transportation, Land Use and Community Coordination</b>				5.44%
28		1	Neighborhood Transportation Program	Planning SFPW SFCTA SFMTA	\$40.00	1.67%
29		2	Equity Priority Transportation Program	Planning SFPW SFCTA SFMTA	\$40.00	1.67%
30		3	Development Oriented Transportation	BART PCJPB Planning SFPW SFCTA SFMTA	\$40.00	1.67%
31		4	Citywide / Modal Planning	Planning SFCTA SFMTA	\$10.00	0.42%
<b>TOTAL DRAFT NEW EXPENDITURE PLAN FUNDING***</b>					<b>\$2,377.09</b>	<b>99.54%</b>

Table 2 - DRAFT Revenue Forecast Options			
Revenue Forecast Options		Funding Amounts (2020 million\$*)	
DRAFT Recommended (conservative) 30-year revenue forecast		\$2,938	
DRAFT Recommended revenues available for the new EP (net of existing obligations, eg Prop K financing, remaining grant balances, and potential legacy projects)		<b>\$2,388.15</b>	
DRAFT Optimistic (high) 30-year revenue forecast		\$3,151	
DRAFT Optimistic revenues available for the new EP (net of existing obligations, and potential legacy projects)		<b>\$2,601</b>	

\* All funding amounts are in millions of 2020 dollars including the total revenue forecast.

\*\* EP percentages are based on a percent of the recommended (conservative) 30-year revenue forecast, net of existing obligations.

\*\*\* EP percentages do not add up to 100% of the recommended (conservative) 30-year revenue forecast in this preliminary draft, and totals may not add up due to rounding errors.

Working with the EPAC and partner agencies, we will develop a Priority 2 funding strategy that will incorporate the additional revenues from the optimistic revenue forecast.

We may also carry forward funding for certain projects from Prop K, which may include the Quint Connector Road, Schlage Lock Development Project, the Downtown Extension and Geary Rapid Improvements.



# Questions?



**San Francisco  
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# DRAFT MINUTES

## Expenditure Plan Advisory Committee

Thursday, September 9, 2021

### 1. Call to Order

The meeting was called to order at 6:00 p.m.

**Present at Roll Call:** Jay Bain, Rosa Chen, Anni Chung, Majeid Crawford, Zack Deutsch-Gross, Jesse Fernandez, Mel Flores, Amandeep Jawa, Nick Josefowitz, Sharky Laguana, Aaron Leifer, Jodie Medeiros, Calvin Quick, Pi Ra, Maurice Rivers, Eric Rozell, Earl Shaddix, Yensing Sihapanya, Kim Tavaglione, Joan Van Rijn, Christopher White (20)

**Absent at Roll Call:** Rodney Fong, Jessica Lum (joined after roll call), Maryo Mogannam, Maelig Morvan, Susan Murphy, (5)

**Alternates Present:** Sasha Hirji

### 2. Welcome from Transportation Authority Chair Rafael Mandelman

Transportation Authority Chair Rafael Mandelman, welcomed the Expenditure Plan Advisory Committee (EPAC) members to the first official meeting of the EPAC, provided some context about the importance of the effort to develop a new Expenditure Plan to continue the existing half-cent transportation sales tax, and thanked everyone for their willingness to devote their time and energy for this purpose. Chair Mandelman then introduced Amandeep Jawa who will serve as EPAC Chair and Anni Chung, who will serve as Vice Chair and appreciated them for their willingness to step up into these roles to help guide the EPAC over the next several months [starting at meeting #2 on September 23, 2021]. He also introduced his legislative aide, Jacob Bintliff, who will be attending most, if not all the EPAC meetings.

### 3. Public Comment - INFORMATION

There was no public comment.

### 4. Expenditure Plan Advisory Committee Purpose and Process - INFORMATION

Michelle Beaulieu, Principal Transportation Planner, Government Affairs presented the item.

A member asked if the slides would be available. Staff replied that they are available online at [sfcta.org/expenditureplan](https://sfcta.org/expenditureplan), as well as on the Transportation Authority's events calendar at [www.sfcta.org/events](https://www.sfcta.org/events).

A member stated that she wanted to know more about the current Prop K Expenditure Plan, including what percentages were expended, what the concerns were, and what was accomplished. They expressed interest in how the agency is thinking about new and innovative ways to reduce greenhouse gas emissions. Ms. Beaulieu said staff would include information on the Prop K sales tax in the next agenda packet and with respect to greenhouse gas emissions, this was something sponsor agencies have been asked to address in their presentations and would be a good topic for breakout



discussions at this and subsequent EPAC meetings.

A member asked about the goal of the EPAC and if it is intended to directly recommend that the Transportation Authority approve a new plan. They asked about the distinction between the Board approval and developing a plan. Ms. Beaulieu replied that the EPAC process is intended to shape development of a New Expenditure Plan and to ultimately adopt the Expenditure Plan and recommend that the Transportation Authority Board adopt the plan and ask the Board of Supervisors to place it on the ballot for voter approval.

A member asked to elaborate on slide 12 showing various Prop K sales tax programs that are running out of funds and asked if traffic calming and bicycle circulation and safety funds were still available. Anna LaForte, Deputy Director for Policy and Programming, replied that programming of funds means the funds are available for a project sponsor to request or allocate when they are ready to proceed with the project. She said that no funds programmed after Fiscal Year 2024/25 means that no funds are available for allocation after those years, assuming the project sponsor(s) has asked for allocation of all the funds programmed before that date.

A member asked if they should have opinions about the revenue side and if the rate of the tax is fixed or variable. Ms. Beaulieu said that this EPAC has been convened explicitly to help develop a New Expenditure Plan for the existing half-cent sales tax.

## **5. Preliminary Draft Expenditure Plan - INFORMATION**

Michelle Beaulieu, Principal Transportation Planner, Government Affairs presented the item.

A member asked if this was superseding Prop K and if the funds to pay for the estimated ~\$450 million in existing Prop K sales tax grant obligations was already available. Maria Lombardo, Chief Deputy Director, replied that yes, the New Expenditure Plan, if approved, would take effect before the 30-year Prop K Expenditure Plan period was over and therefore, would need to take on any remaining financial obligations from the Prop K program. She said this includes the ~\$450 million in grant balances for existing allocations. Ms. Lombardo said that while the agency has some cash available, it isn't enough to cover the total obligations were sponsors to ask for all of it today. She said the agency is able to finance to cover the costs, but also works with sponsors to approve reimbursement schedules that take into account the project schedule - many of which span multiple years, as well as other funding sources paying for the project. She said that helps to spread out the timing of when the reimbursements come in and helps to minimize financing costs.

The member asked if there was enough in the Prop K sales tax to pay all of its obligations. Ms. Lombardo replied that there was over the 30-year life of the Expenditure Plan. She said the agency regularly updates the Prop K Strategic Plan, the financial planning tool for the sales tax to ensure it has enough revenues to pay for the grants or allocations made, plus any financing costs.

A member asked about the estimated sales tax revenue and who decides what to do with revenue if there was a surplus. In addition to the conservative and optimistic forecast that were presented, they also suggested presenting a forecast that was



beyond the optimistic forecast. Ms. Beaulieu replied that the revenue projection was over 30 years and, in the past, there had not been a surplus of revenues. Ms. Lombardo added that because no one can accurately forecast 30-years into the future, the way the Expenditure Plan handles this is by showing a percentage share of revenues for each program, along with estimated dollar amounts. This allows staff to scale the amounts up or down according to revenues, using the percentage share. In addition, Ms. Lombardo noted, that the New Expenditure Plan can specify how to distribute the funds for the optimistic forecast, as well as a potential higher forecast if the EPAC choose to do so, noting that the Prop K Expenditure Plan has three revenue level forecasts and corresponding priorities in the Expenditure Plan for each level.

A member asked what engagement that extends beyond the EPAC might look like and how it might inform the process. Ms. Beaulieu replied that there would be more information about this in the upcoming equity presentation on the agenda and that regular updates could be provided as supporting materials between meetings.

A member stated that they were going to bring up the possibility of a third revenue forecast as well and said that there were three options for Prop K that corresponded to the minimum, the realistic, and the wish list revenue levels. They said it was hard to gain agreement on the prior sales tax EPAC, but the highest revenue forecast provided a sense of priority and it was a tool that was helpful in gaining consensus in the last EPAC.

A member asked if the conservative forecast was based on the COVID-19 pandemic or business as normal, and if it included environmental disasters like smoke were reflected in the sales tax revenue forecast. Ms. LaForte acknowledged that revenue projections are challenging and even more so with the pandemic. She said the agency worked with a sales tax consulting firm to develop the revenue forecasts which did make assumptions about when people would return to working in offices, about overall vaccination rates, when business and travel would return to pre-pandemic levels, and beyond that when international tourism would return. She said that smoke and natural disasters aren't explicitly included in the assumption, but that the model incorporates periodic recessions as part of the long-term economic cycle. She added that while one can't assume this indicates a trend, June revenues collected exceed pre-pandemic collections for the same month, which was a positive sign.

A member expressed concern about the conservative forecast and asked what the scenario would be if the New Expenditure Plan were not approved. They expressed worry about paratransit and what might happen to paratransit operations if that happened. Ms. Beaulieu replied the Prop K Expenditure Plan continues until 2034 so it would continue if the New Expenditure Plan and sales tax extension were not approved in 2022. She said based on the current Prop K Strategic Plan, there would be enough money for the paratransit program until Fiscal Year 2024/2025, providing several more chances at the ballot if needed.



A member noted the possibility of a new federal program coming that may provide access to dollars that may not be available if a different administration comes in.

A member asked if contingency planning was a possibility, for example if the SFMTA gets a certain amount of dollars from the federal government, then sales tax funds could be redirected elsewhere. The member also said they would appreciate gaining an understanding of how critical sales tax funds are for these projects, such as what percentage of Prop K funding was part of their overall budget and what impact it would have on those programs. They said it would be helpful to see an objective baseline laid out in a spreadsheet or other rating system to help the EPAC compare across programs. Ms. Beaulieu replied that it was possible to have that sort of contingency plan in place. Ms. Lombardo added that when staff develop the leveraging assumptions for each program, they looked at all the other federal, state, local and regional funds expected to be available over the 30-year Expenditure Plan period and make a judgement about how much of those funds each program would likely secure based on eligibility and competitiveness. She said that will provide some indication of the importance of the sales tax for various programs and she reiterated that the project sponsors would speak to this topic in their presentations starting next meeting.

## **6. Equity Analysis: Findings and Recommendations - INFORMATION**

Kaley Lyons, Senior Transportation Planner, presented the item.

A member said that it would be difficult to right all the wrongs of the past and asked if there was a list of best practices to remediate some of the inequities. Executive Director Chang recognized that there was a lot of expertise among committee members on this topic and encouraged sharing best practices with one another during the breakout sessions.

*The Brown Act meeting was suspended to allow members to participate in breakout rooms. The minutes below reflect the breakout group reports outs after the Brown Act meeting was resumed, with additional notes added to summarize discussions in the breakout rooms for reference.*

During the breakout discussion, a member asked if it would be possible to see a map of traffic volumes compared to population density. Staff noted that this information is available on the Transportation Authority's website.

A member asked if the EPAC could see a map of Muni lines laid over the Equity Priority Communities, and stated that District 7 did not have a lot of transit options.

Another member noted that it would be helpful to have a citywide discussion of equity, for more than just transportation. The member noted that the Recreation and Parks Department had changed their prioritization process to prioritize investments in Equity Priority Communities, and that should be done for all topics including transportation.

A member expressed appreciation for the serious conversation on equity. They wanted to know what the trade-offs were between equity and other city priorities. They also noted that some investments could help everyone in the city, in effect "lifting all boats." They asked if something could be presented to the committee for discussion. Staff agreed that there were some investments, such as investing in the backlog of



maintenance investments for Muni, for example, that benefit the entire system while also supporting equity since Muni's ridership is disproportionately low income.

A member stated that a lot of the plan had to do with getting residents to downtown, particularly the transit investments, but that getting downtown might not be as important as it had been in the past with increasing remote work. The member felt that the jobs-housing relationship will change and be more corridor-focused. The member stated that Muni didn't focus on where Equity Priority Communities were located, but on where jobs were located, and that they need to support Muni to lift all boats but also to help determine how to adapt their service plan for the future. Staff noted that the sales tax doesn't fund Muni service, but that it could fund improvements/changes to transit stops and red lanes that could support any service changes.

One member asked about poor air quality areas and wanted to take into consideration where congestion is impacting peoples' health.

Another member asked about the youth population and wanted more information about how they get around. They also asked about transportation education. Staff stated that they would provide information about where young people live in the city and noted that bicycle and pedestrian and vision zero education could be eligible in the Safer Streets program.

A member stated that there was an aging population, and that there would be a need for more paratransit service.

Another member asked about the date of data in the presentation. Staff noted that the presentation pulled from multiple sources to provide a breadth of information, and that the data come from multiple dates because of that. The member noted that certain parts of the city, the Mission, Bayview and Dogpatch, were the fastest growing in the city and were probably adding a lot of transit riders. They asked about where jobs were going and what kinds and lengths of trips people would be making in the future.

Staff noted that the member was correct about where growth was occurring, and that the Transportation Authority's parallel countywide plan update (called the San Francisco Transportation Plan) that looked where growth was happening and forecast to be happening in the future, and that plan was being developed with an inter-agency group through the ConnectSF process. That process uses the Metropolitan Transportation Commission's growth forecast to start, and the Planning Department was using that to develop the Housing Element to distribute growth across the city.

A member noted that it would be helpful to see what kinds of trips were being taken, to help understand what the need was for planning. They also mentioned it would be interesting to see a presentation about the Housing Element in the future as well, as it would feed into the transportation needs of the future.

A member asked about how different city goals would overlay, including climate goals, vision zero, and transit, and how to improve transportation to address multiple goals.

During the breakout discussion, a member expressed concern about the equity solutions not addressing historic impact of transportation on communities.

A member asked about the process of developing new ideas to help communities that have been negatively impacted by transportation policies and asked who they can email with ideas before the next meeting. They also asked if there a document that explains what qualifies for funding.



Staff responded by indicating the three different ways to influence the funding reauthorization plan: process, types of investment, and administration. They provided information about where emails could be sent ([expenditureplan@sfcta.org](mailto:expenditureplan@sfcta.org) or [clerk@sfcta.org](mailto:clerk@sfcta.org)). Staff added that the expenditure being developed with input from the EPAC would determine the criteria for what qualifies for funding.

A member asked if the transportation cost analysis included all the costs of owning a vehicle, such as gas, maintenance, and so on. They also asked about the success of electric vehicle program subsidies and if those programs were being used by people in Equity Priority Communities (EPCs).

A member asked if the Transportation Authority was already considering equity in community-based planning in the existing Prop K program, and if so, how it was being communicated to these communities to explain that funding was available for their transportation projects.

Staff stated that funds were prioritized for equity funding for projects that come from community-based planning efforts. Staff said that in order to strengthened the focus on EPCs in the New Expenditure Plan, staff was recommending a new program to support planning in EPCs, citywide equity planning, and to provide local match funds to help implement recommendations from these plans. Staff added that they are conducting outreach and taking suggestions on community groups that should receive a presentation.

A member asked if there were parameters or flexibility on what would be prioritized.

Staff responded that setting parameters was part of the work to be done with the EPAC. They added that it was good to keep the guidance flexible but provide enough direction for voters to know how the revenue would be used. Staff added that there were multiple places where the EPAC and the public could influence prioritization, including 5-Year Prioritization Programs, which are developed through a public process and are the place where the list of specific projects to be funded in the next 5-year period are established for the sales tax programs. Staff said this is the process in the Prop K Expenditure Plan and that staff is recommending it be continued for the New Expenditure Plan.

During the breakout discussion, a member mentioned the bar chart showing the proportion of income towards transportation on the "Transportation Costs" slide and said the note indicating "Income numbers are for a family of four" raised questions about the definitions the city used and who fits into different categories. They said there was an ongoing racial wealth gap and a concentration of affluence in the Bay Area, so the income numbers could be problematic and may not allow an accurate reflection and get to the target populations in the equity priority communities.

Staff responded that the region and state often set certain thresholds for what was considered low income and sometimes it did not account for the higher cost of living in San Francisco. Staff said working with those definitions was a challenge and they could investigate other sources.

The member responded that they believed the AMIs developed for the Bay Area had implications for income statistics. They said it would be helpful to show the data by San Francisco supervisorial district and noted that there were ways to define the information differently.

A member said that the maps shown on the Transportation Costs, Traffic Safety and



Public Health slides had a distinct correlation.

A member said impacts of the pandemic were still present and were an important dimension to the data.

Staff mentioned that transit operators have collected ridership data during the pandemic and have highlighted that the profile of riders has changed dramatically since the pandemic began.

A member said they did not see the mention of youth, particularly youth of color, and their reliance on transit to travel to and from school in San Francisco. They said a majority of San Francisco Unified School District high school students of color used Muni to travel to school and has heard that getting across town to school could be challenging if one had to rely on taking multiple buses that were constantly full. They said the impacts on youth of color getting to school, work and leisure in San Francisco could be analyzed.

A member mentioned cross town transportation and said there seemed to be reasonably good access to downtown. They said as they thought about the 30-year plan and disincentivizing the use of cars and freeways, while recognizing that outer neighborhoods were not currently well served by transit, it was hard to establish spending priorities without having a sense of what would be possible with improving transit routes and services. They said they needed a lattice transportation system that was more evenly distributed and could respond more efficiently to demand changes.

A member highlighted the non-traditional transit routes and mentioned that the 29 bus route had about 30 schools in a quarter of a mile of the route, was used by many students and routinely had operational problems such as crowding and pass ups. They said investing in routes that serve neighborhoods and not necessarily downtown, whether that be capital improvements, school trippers, etc would be important to fund from an equity perspective for youth. They said the investments would create and sustain an integrated public school system, which was something the city and school district were grappling with.

Referring to the pie chart on the Preliminary Draft New Expenditure Plan slide of the Agenda Item 5. Preliminary Draft Expenditure Plan presentation, a member asked if the previous point would fall under a major transit project or transit maintenance and enhancements. They said if investments were made in core infrastructure, it could reduce the need to invest in streets and freeways.

Referring to the same pie chart, a member said it was difficult to tell where the expenditures were taking place, which had an impact on equity.

Staff clarified that the Muni Bus Reliability and Efficiency Improvements would fund planning work to figure out the type of transit improvements that made sense.

A member referred to the Transportation Costs slide and said that none of the bullet points addressed costs for users, which needed more work.

During the breakout discussion, a member asked if data was available on travel patterns for people coming from EPCs and where they were traveling.

A member mentioned that a Census was recently completed and asked if updated information would be included in the report.

San Francisco Public Works (SFPW) staff mentioned that some funding sources, such as developer impact fees, can only be used in certain neighborhoods, and asked if an





analysis could look at similar requirements for other funding sources.

A member said that children and youth were missing from the equity analysis and that they will be around longest and therefore heavily impacted by investments.

A member asked about the community-based planning recommendation that was presented at the meeting. They asked if this was new or a continuation of other planning efforts and mentioned that the San Francisco Department of Public Health has a community-based planning program where community-based organizations receive funding annually to organize neighborhoods around pedestrian safety and/or transportation issues involving seniors.

Staff responded that there are ongoing community-based planning efforts and this recommendation would specifically call out funding for community-based planning as a program in the New Expenditure Plan.

A member asked if the equity analysis factored in impacts of free Muni for seniors and potentially free Muni for youth and how that might impact travel patterns and usage.

Staff responded that this was not addressed in the equity analysis but staff would look into any available analysis that may already be done.

A member asked if there were any data on late night transportation and ridership as many hospitality workers do not have typical 9am to 5pm schedules and may not have adequate transit service available at the times they need it.

A member asked about how much of the community-based planning funding was intended to be planning versus implementation. They also asked if there would be opportunities for equity studies using a definition that differs from the Metropolitan Transportation Commission definition for EPC as these were harder to fund.

Regarding addressing transportation costs, a member asked if there was information on Muni's affordability programs as these may take care of some of the need already.

A member asked how SFMTA decided which Muni lines to start running again and said service cuts had impacted seniors, people with disabilities, and students in District 11. They also asked how maintenance in terms of cleaning was affected.

Staff responded that they would follow up with SFMTA separately and that cleaning trains was considered operations rather than a capital expense.

A member announced that the SFMTA is currently updating their capital plan and encouraged others to get involved in that process. They said to hit the equity mark, the New Expenditure Plan could fund access and streetscape type improvements.

A member said it would be helpful if there was an analysis of where there were transit deserts, like food deserts, in the city and how infrastructure could help provide better connections.

A member said that the Transportation Authority establishes policies procedures around disbursing sales tax funds, including what it could be spent on and how it could be spent.

Staff confirmed this and said that policies would be discussed at a later meeting.

During the breakout discussion with members of the public, a member of the public said that his concern regarding targeting investment toward certain communities based on equity criteria was "if you build it, will they come?" They said that San



Francisco had built the 3rd Street light rail and then had to bring back the 15-3<sup>rd</sup> Street bus. They asked whether priorities were misplaced. They said they would be interesting to see how successful the Central Subway would be. They said there was no doubt about the need for equity and for people to access transportation investments. They said buy-in by the constituents needed to be determined in the designated area to ensure that investments would be used.

A member of the public said that transportation investments need to be equitable. They said that doing actual on the ground outreach produces projects that come from the community. They said that prioritizing projects that come from community planning efforts can take a lot of effort and money, but will get to a point of equitable investment. They said that the sales tax should help fund these community planning efforts.

An EPAC member said that projects should be prioritized that benefit EPCs and provide profound climate benefits. They said that standards or scoring criteria need to be developed to redirect resources to projects that meet certain requirements and work toward these goals. They suggested focusing on signature projects that have meaningful impacts, like the big rail projects which don't always have the deepest equity impact or the five-minute network on transit lanes, with a commitment to lead with equity. They expressed the need to be conscious that building infrastructure in EPCs has its own set of challenges and there should be more sophisticated models of benefits to these communities than just a project within a certain community.

A member of the public said that in Watsonville, they were establishing a circulator bus through lower income neighborhoods that would be frequent and reliable and connects to regular established bus routes. They said that it would be interesting to see how successful that would be.

A member of the public said that regarding priority, low-income communities should come first. They said San Francisco is diverse but the ones who need help were lower income as they relatively have fewer options, and that was not necessarily the case for minorities in EPCs. They said they think projects from community planning efforts directly reflect their wishes but lacks the regional view that others had. They said to take the ideas from the communities but prioritize the ones that benefit multiple communities, especially projects that benefit multiple low-income communities.

**7. Draft Minutes of the August 19, 2021 Workshop/Meeting - INFORMATION**

**8. Adjournment**

The meeting was adjourned at 8:00 p.m.

# Agenda Item 4.

## Public Comment



San Francisco  
County Transportation  
Authority

September 23, 2021

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## Public Comment

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**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



San Francisco  
County Transportation  
Authority

# Agenda Item 5.

## Maintaining the System: Street Repaving Bicycle & Pedestrian Facilities



San Francisco  
County Transportation  
Authority

September 23, 2021

# Preliminary Draft New Expenditure Plan

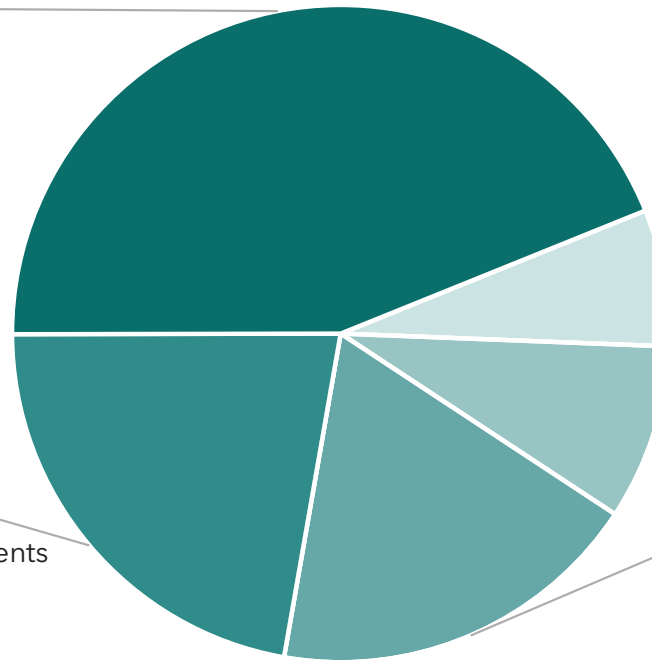


San Francisco  
County Transportation  
Authority

## Transit Maintenance & Enhancements, 43.7%

Muni, BART, Caltrain, Ferry  
Maintenance, rehabilitation and replacement

Station/Access improvements  
Next generation transit planning



## Major Transit Projects, 22.1%

Muni Bus Reliability & Efficiency Improvements  
Muni Rail Core Capacity  
BART Core Capacity  
Caltrain Service Vision: Capital Investments  
Downtown Rail Extension & Pennsylvania Alignment

## Transportation System Development & Management, 6.7%

Community-based and citywide planning  
Equity studies  
Demand management (including pilots)

## Paratransit, 8.6%

Transit service for seniors and people with disabilities

## Streets & Freeways, 18.4%

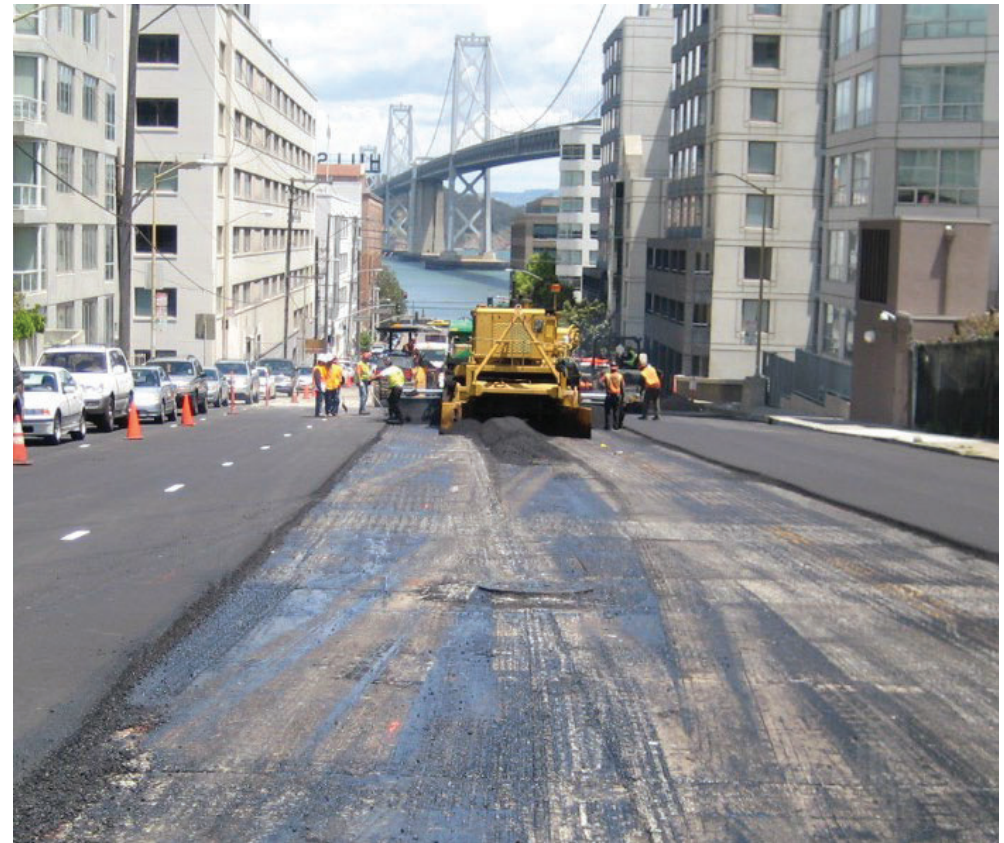
Bicycle & pedestrian improvements  
Traffic calming and signals  
Street repaving  
Bicycle & pedestrian facility maintenance  
Freeway safety and operations  
Freeway redesign planning

## Maintenance, Rehabilitation and Replacement



San Francisco  
County Transportation  
Authority

- Well-maintained infrastructure is essential to ensuring safe and reliable transportation for everybody
- San Francisco's system suffers from chronic underinvestment; deferred maintenance work often costs more to address
- **About 50% of the Preliminary Draft Expenditure Plan would fund maintenance, rehabilitation and replacement**





## Maintenance, Rehabilitation and Replacement



San Francisco  
County Transportation  
Authority

- Project types being highlighted today are funded through a combination of sources including **federal, state** and **local** funding.
- Some project types are more difficult to fund than other project types (e.g. transit maintenance facilities)







## Sales Tax Reauthorization

Streets and Freeways

Maintenance, Rehabilitation and Replacement

Expenditure Plan Advisory Committee

September 23, 2021

# Streets and Freeways

## Maintenance, Rehabilitation and Replacement

Funding Category <small>(in Millions)</small>	Funding Need	Proposed Funding	% of Need
Street Resurfacing and Reconstruction	2,285.0	88.0	3.9%
Street Repair and Cleaning Equipment	166.5	17.0	10.2%



30-year costs in  
constant 2020 dollars



Funding to maintain  
Pavement Condition  
Index of 75 and  
replace equipment  
according to industry  
standards

## Street Resurfacing and Reconstruction

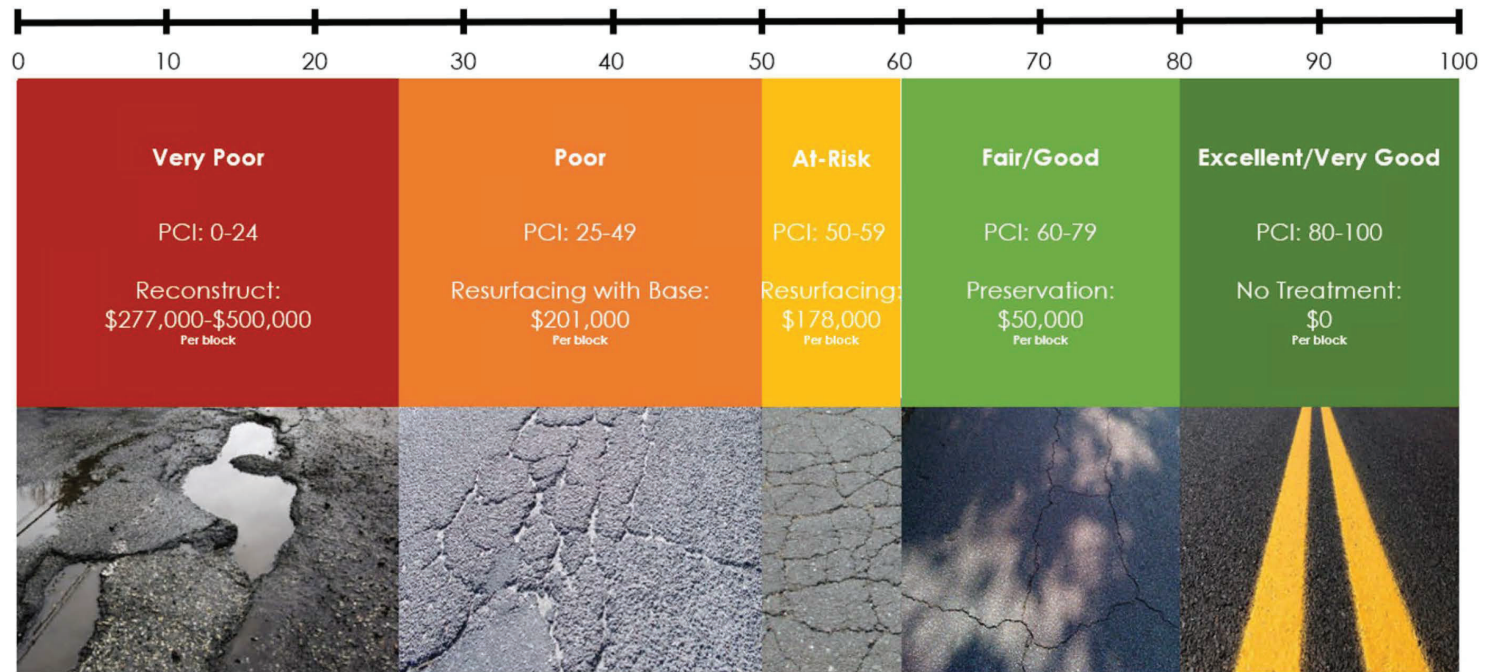


Masonic Avenue Project

- Well-maintained and accessible streets are essential for mobility
- Smooth, pothole-free streets reduces hazards and improves safety
- Preserving streets in good condition is the most cost-effective pavement management strategy

## Street Resurfacing and Reconstruction

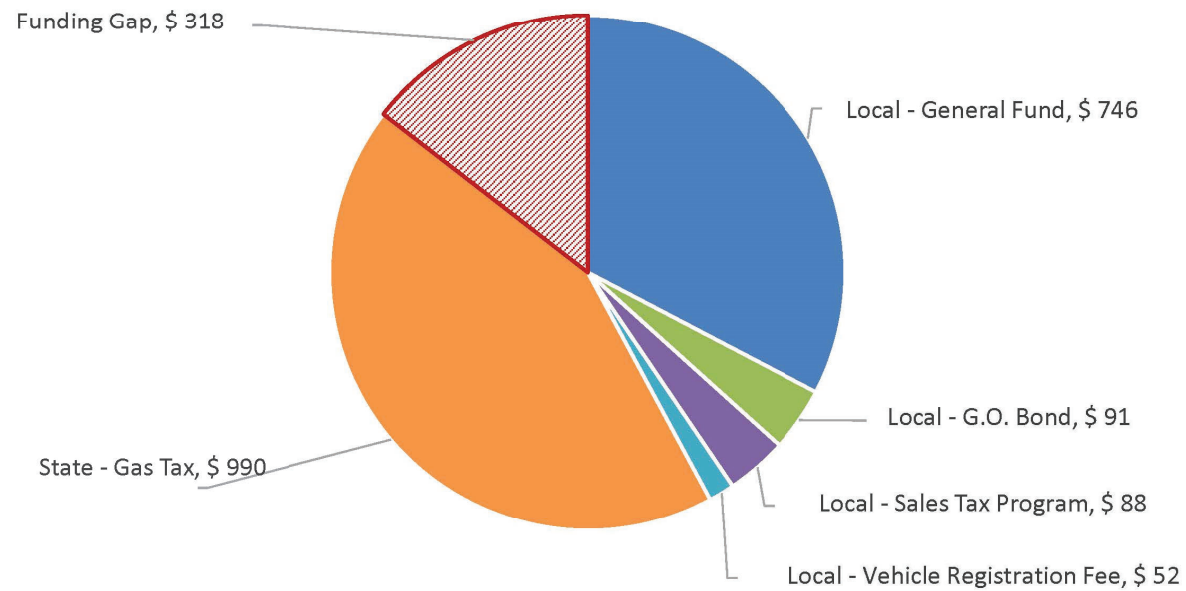
San Francisco uses the industry standard rating scale called the **Pavement Condition Index (PCI)** to score its streets.



## Street Resurfacing: Funding Outlook

30-Year Cost (in Millions)	Sales Tax	Other Sources	Shortfall	% Funded
2,285	88	1,879	318	86.1%

Street Resurfacing Program - 30-year Funding Outlook

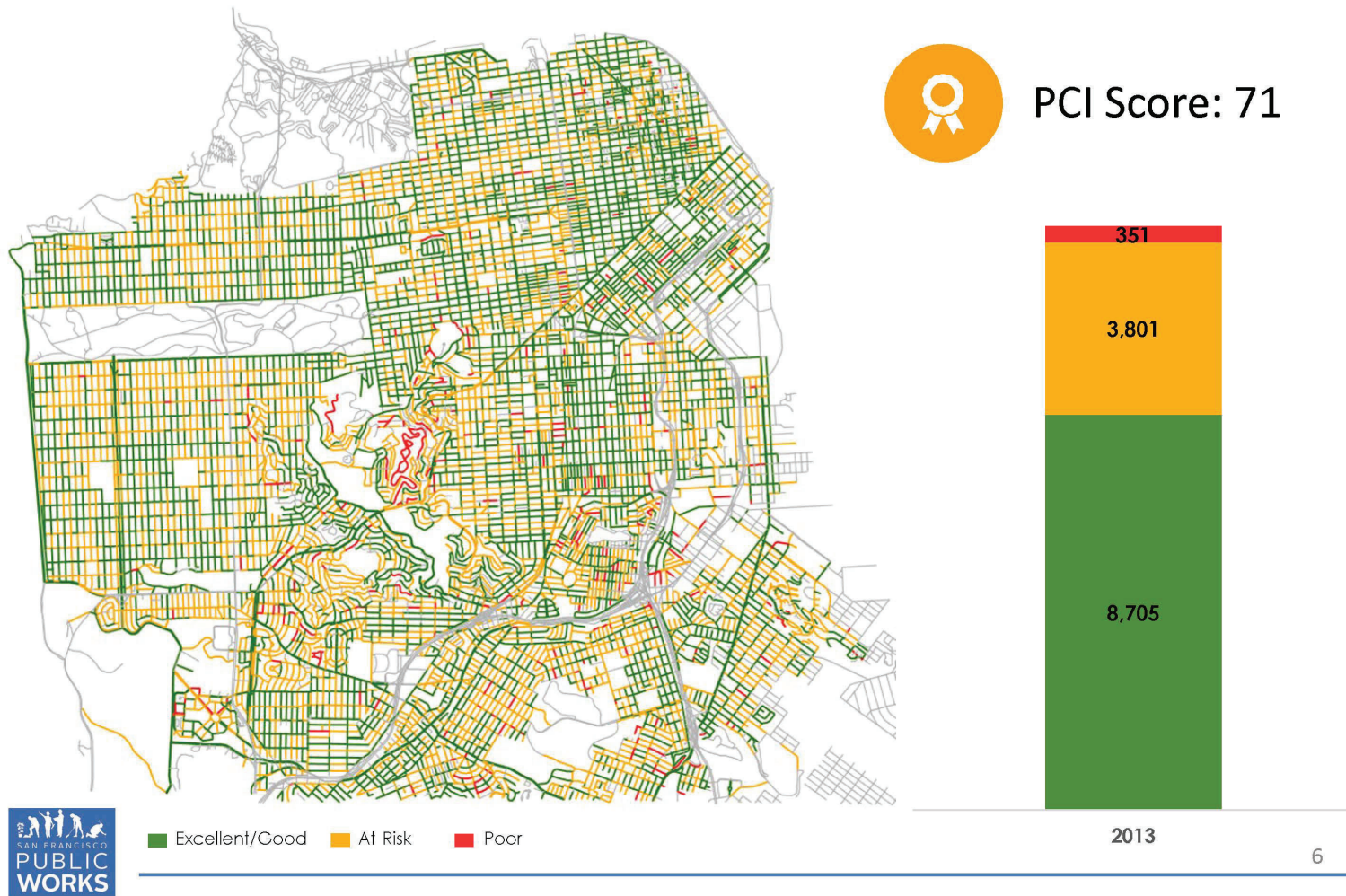


Funding Outlook based on assumptions from San Francisco's Fiscal Years 2022-31 Capital Plan

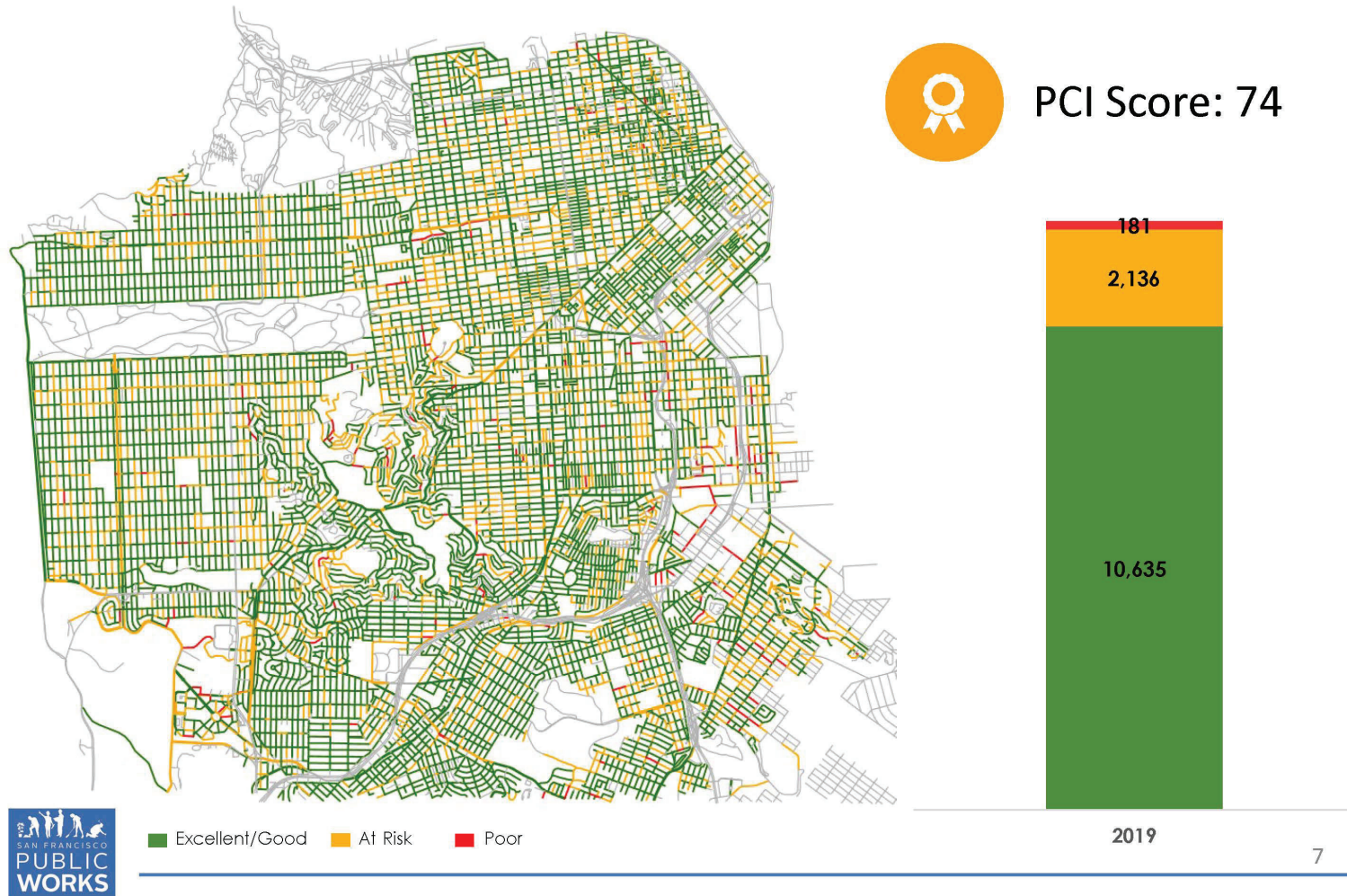
5



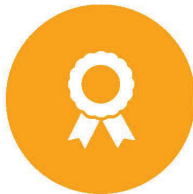
## Street Resurfacing: Network Condition FY 2013-14



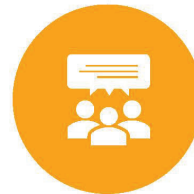
## Street Resurfacing: Network Condition FY 2019-20



## Street Resurfacing: Project Selection Criteria



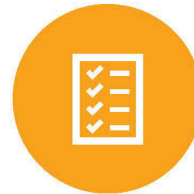
Pavement Condition  
Index (PCI) Score



Inquiries, project  
readiness and  
coordination



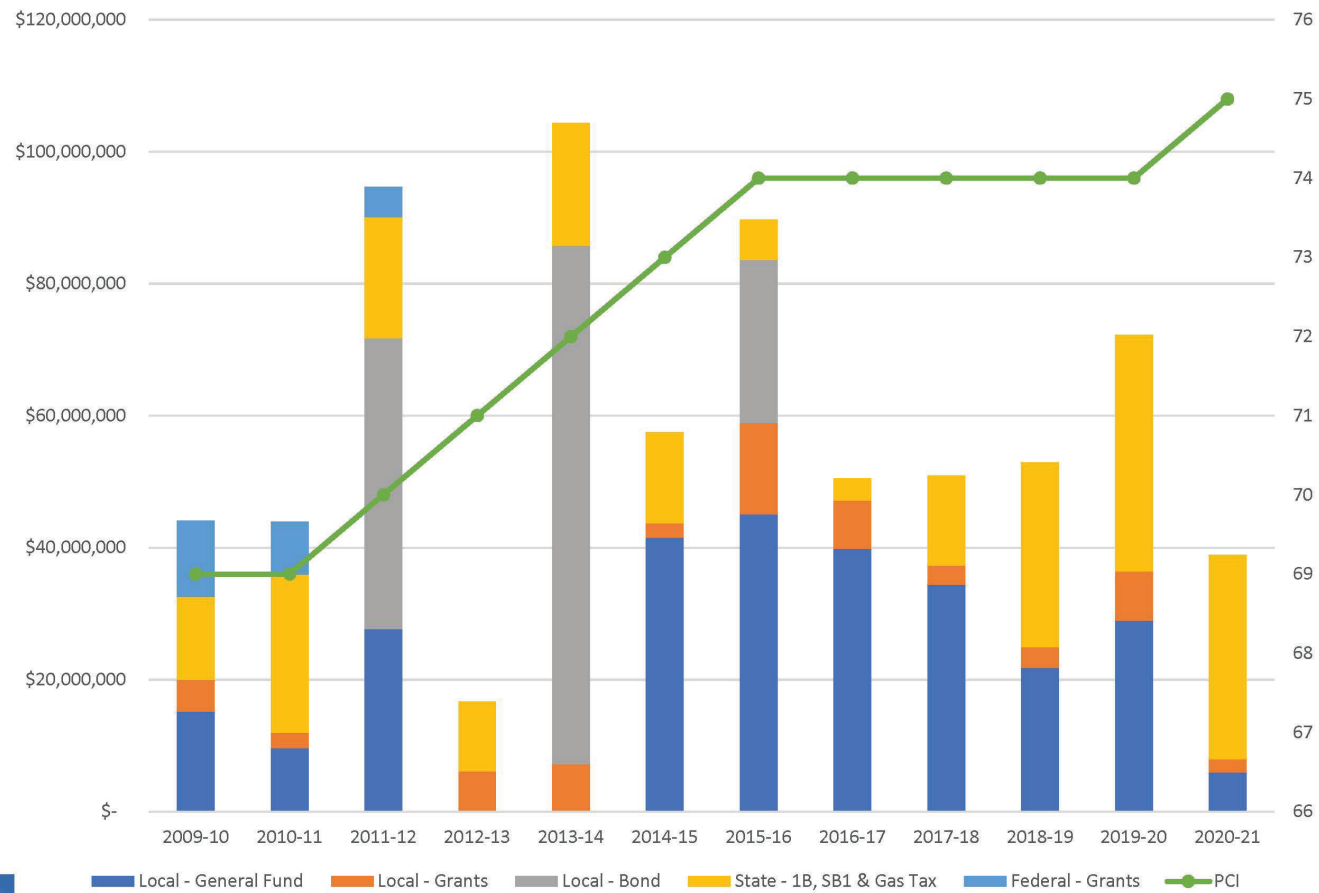
Geographic equity



Funding, multi-modal  
routes

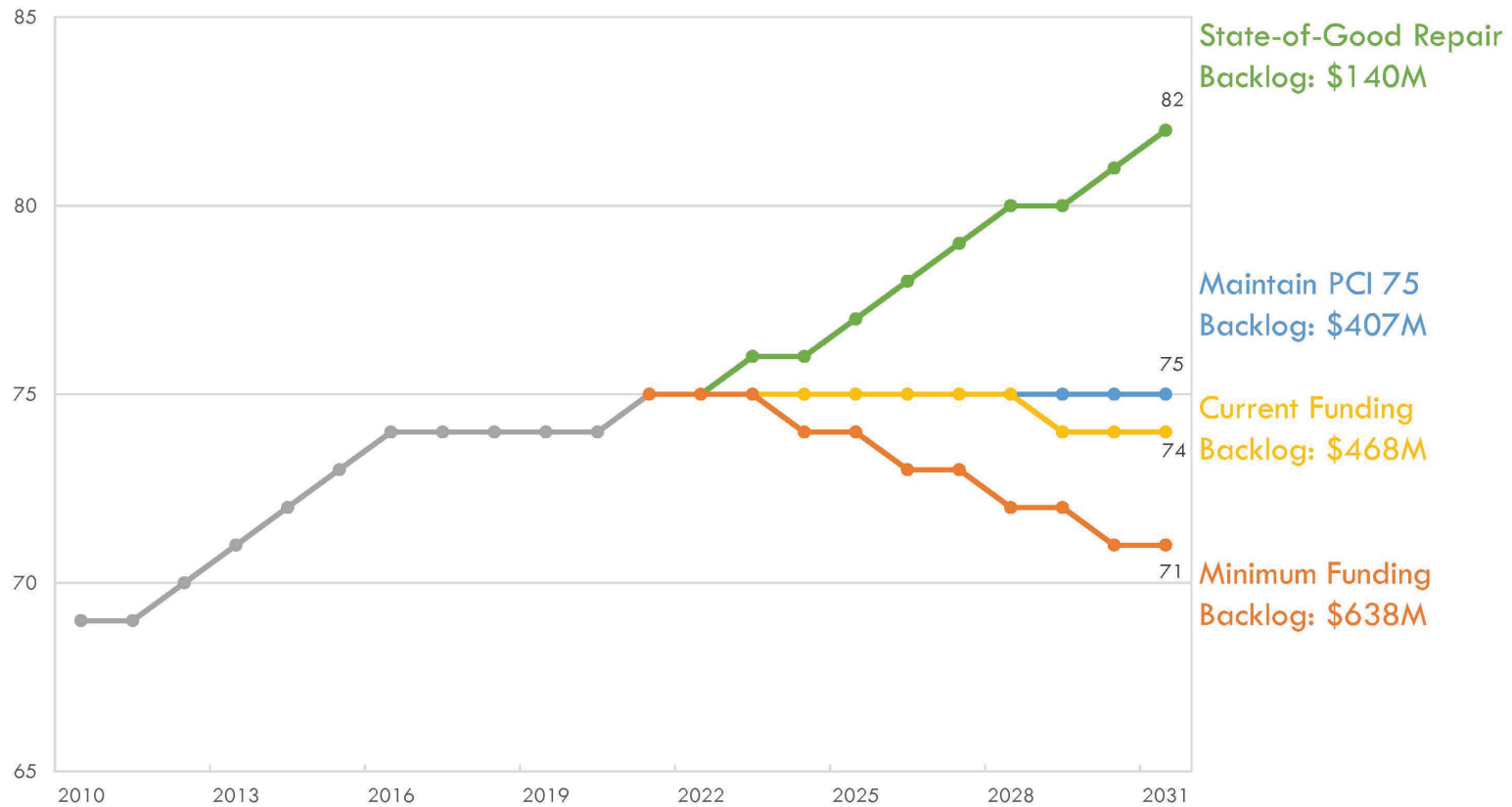


## Street Resurfacing: Historical Budget and PCI



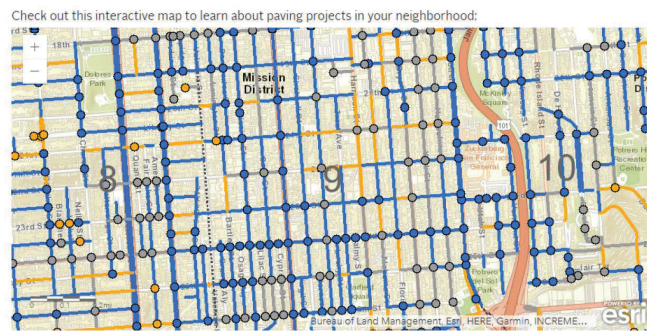
Local Grants include Prop K Sales Tax and Prop AA Vehicle Registration Fee funds.

## Street Resurfacing: Network PCI by Funding Scenarios



## Street Resurfacing: Resources

### Program Website

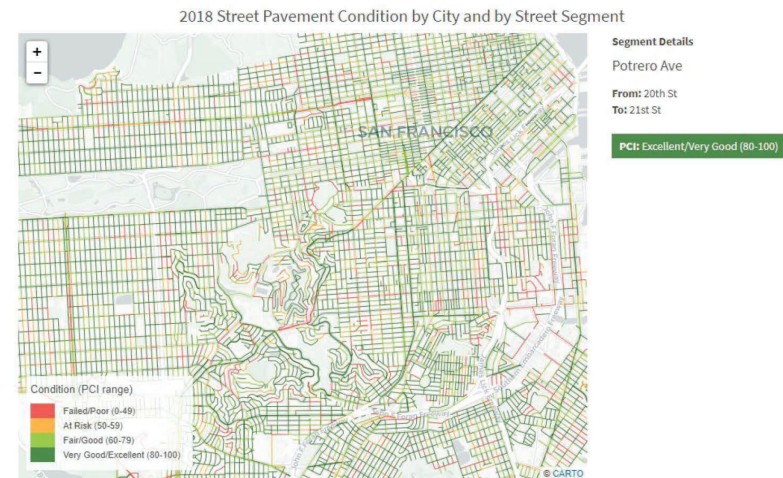


NOTE FOR MAP ABOVE: All Public Works Street Resurfacing Program candidates are subject to substitution and schedule changes pending available funding, visual confirmation, utility clearances and coordination with other agencies and are NOT guaranteed to be moved forward to construction. Unforeseen challenges, such as increased work scope, changing priorities, cost increases or declining revenue may arise, causing the Public Works Street Resurfacing Program candidates to be postponed or dropped from consideration.

<https://sfpublicworks.org/street-resurfacing>



### PCI Score by block



<https://www.vitalsigns.mtc.ca.gov/street-pavement-condition>

## Street Repair and Cleaning Equipment

30-Year Cost (in Millions)	Sales Tax	% of Need
166.5	17	10.2%

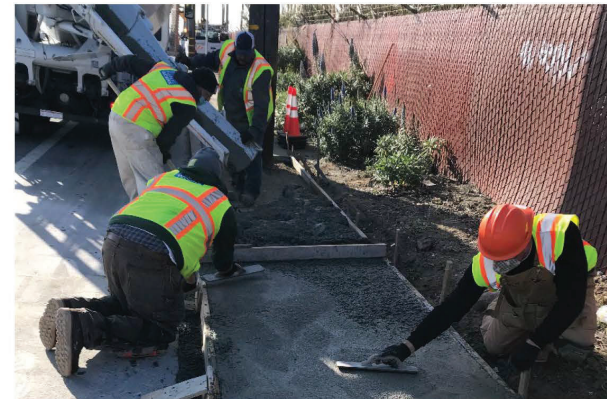
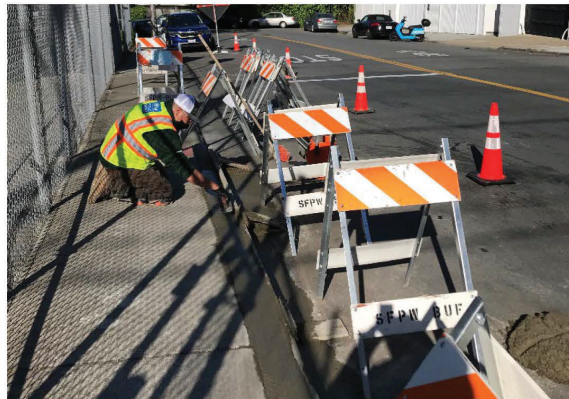


- Cost of replacing vehicles and equipment that reach their useful life
- Current inventory includes 193 vehicles and equipment including sweepers, high pressure cleaners, rollers, pavement grinders, dump trucks and pavers.



## Public Sidewalk and Curb Repair

30-Year Cost (in Millions)	Local Sales Tax	State Sales Tax	% Funded
27	13.6	13.4	100%



- Repairs damaged public sidewalks, curb and gutters not related to street tree damage. Damage is typically caused by trucks driving up on curbs, old age, heavy equipment, vehicular crashes
- 1,850 outstanding repair request, with more added every year

# Thank You



San Francisco Transportation Sales Tax Reauthorization

# **Repairs and Maintenance:** Bicycle & Pedestrian Facility Maintenance

Expenditure Plan Advisory Committee  
September 23, 2021

**Transportation 2050**



### Identifying Needs



## Transportation 2050 – Needs and Gaps



The SFMTA took the vision of ConnectSF and the capital needs in the agency's capital plan and looked at operational and capital needs for the next 30-years. The result was **Transportation 2050**.

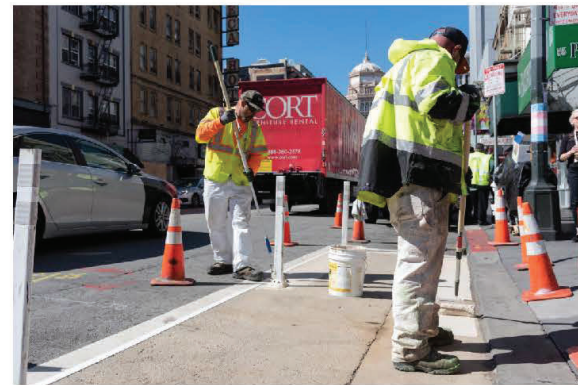
Reference: [Transportation 2050](#)



## Maintaining Bike and Ped Infrastructure is Key to Maintaining the Benefit of that Infrastructure



- Maintaining foundational infrastructure such as paint and posts are integral to reaching our Vision Zero Goals.
- Ensuring new infrastructure such as new Bike Lane and Pedestrian Safety Zones maintain their effectiveness and visibility



## Pedestrian and Bicycle Facility Maintenance

### Financial Need:

- Restoring and replacing pedestrian and bicycle infrastructure such as paint, soft hit posts, signs and signals.
- ~\$226 million needed through 2050
- Need will continue to grow as new infrastructure is installed.

### Available Funding:

- No dedicated sources outside of Prop K.
- Currently funded through SFMTA Operating Budget.



Improving Safety  
and Access



More Repairs and  
Maintenance

Reference: [Transportation 2050](#)

# Questions?



**San Francisco  
County Transportation  
Authority**

**DRAFT New Expenditure Plan Program Description**  
**Streets and Freeways: Maintenance, Rehabilitation and Replacement**  
**Street Repaving and Bicycle & Pedestrian Facility Maintenance**

At each EPAC meeting, Transportation Authority staff will provide draft program descriptions for the programs to be discussed at that meeting. This language defines the types of projects eligible in each proposed New Expenditure Plan program, and names a sponsor agency or agencies who will be eligible to receive funding from the program. The final language will include the recommended sales tax funding amounts, including funding from the conservative forecast (referred to as Priority 1) and, as recommended, funding from the more optimistic forecast (referred to as Priority 2).

This initial draft language was prepared with sponsor agency input using:

- The Transportation Authority's Needs Assessment developed for the San Francisco Transportation Plan 2050, including funding and program needs from all the transportation agencies serving San Francisco
- Proposition K sales tax program descriptions, updated to reflect lessons learned and to address the current needs of the sponsor agencies.

Over the course of its meetings, the EPAC will work with staff to finalize this language.

## **1. Street Resurfacing, Rehabilitation and Maintenance**

### **Preliminary Draft New Expenditure Plan**

Repaving and reconstruction of city streets to prevent deterioration of the roadway system, based on an industry-standard pavement management system designed to inform cost effective roadway maintenance. Includes project development and capital costs. May include sidewalk rehabilitation and curb ramps. Sponsoring Agency: SFPW. Total Funding: TBD; New EP: \$88M.

### ***Prop K Expenditure Plan Description***

*Repaving and reconstruction of city streets to prevent deterioration of the roadway system, based on an industry-standard pavement management system designed to inform cost effective roadway maintenance. Includes project development and capital costs. May include sidewalk rehabilitation, curb ramps and landscaping, subject to approved prioritization plan. Sponsoring Agency: DPW. The first \$118.3 M in Prop K is Priority 1 and the remainder is Priority 2. Total Funding: \$641.3M; Prop K: \$134.3M.*

## **2. Street Repair and Cleaning Equipment**

### **Preliminary Draft New Expenditure Plan**

Replacement of street repair and cleaning equipment according to industry standards, such as but not limited to, asphalt pavers, dump trucks, sweepers, and front-end loaders. Includes capital costs only. Sponsoring Agency: SFPW. Total Funding: TBD; New EP: \$17M.

### ***Prop K Expenditure Plan Description***

*Replacement of street repair and cleaning equipment according to industry-standards, such as but not limited to, asphalt pavers, dump trucks, sweepers, and front-end loaders. Includes capital costs only. Sponsoring Agency: DPW. The first \$22.8M in Prop K is Priority 1 and the remainder is Priority 2. Total Funding: \$36.4M; Prop K: \$25.9M.*

### 3. Pedestrian and Bicycle Facilities Maintenance

#### **Preliminary Draft New Expenditure Plan**

Public sidewalk repair and reconstruction citywide. Additional pedestrian facility improvements including stairways, retaining walls, guardrails and rockfall barriers. Rehabilitation of bicycle paths. Maintenance of pedestrian and bicycle safety improvements including but not limited to safe hit posts, painted safety zones, green bike lanes, and crosswalks. Includes project development and capital costs. Sponsoring Agencies: SFPW, SFMTA. Total Funding: TBD; New EP: \$17.67M.

#### ***Prop K Expenditure Plan Description***

*Public sidewalk repair and reconstruction citywide. Additional pedestrian facility improvements including stairways, retaining walls, guardrails and rockfall barriers. Upgrades of substandard bicycle lanes; rehabilitation of bicycle paths, and reconstruction of MUNI passenger boarding islands. Includes project development and capital costs. Sponsoring Agencies: DPT, DPW, MUNI. The first \$17.4M is Priority 1 and the remainder is Priority 2. Total Funding: \$36.8M; Prop K: \$19.1M.*

#### **Acronyms**

*New EP – New Expenditure Plan; SFMTA – San Francisco Municipal Transportation Agency; DPT – Department of Parking & Traffic (now part of SFMTA); DPW/SFPW – San Francisco Public Works; and TBD – To Be Determined*

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San Francisco  
County Transportation  
Authority

# Agenda Item 6.

## Maintaining the System: Muni, BART and Caltrain



San Francisco  
County Transportation  
Authority

September 23, 2021

## Maintenance, Rehabilitation and Replacement



San Francisco  
County Transportation  
Authority

- Consistent with San Francisco's Transit First Policy, about 66% of the Preliminary Draft Expenditure Plan would fund transit capital improvements
- **About 41% of the Draft Plan would fund transit maintenance**







San Francisco Transportation Sales Tax Reauthorization

## **Repairs and Maintenance:**

Vehicles

Guideways

Facilities

Expenditure Plan Advisory Committee  
September 23, 2021

**Transportation 2050**



### State of Good Repair

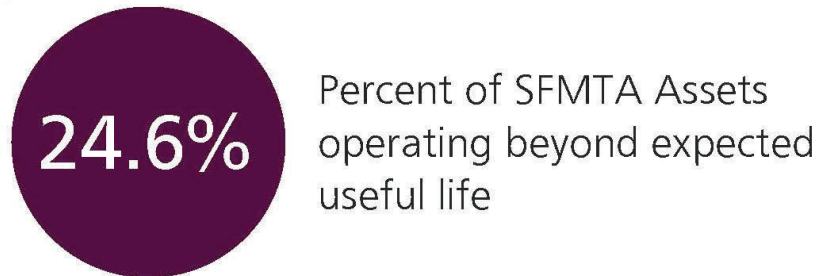


## What is State of Good Repair?

The SFMTA defines State of Good Repair as the condition in which the Agency's assets can operate at a full level of performance. State of Good Repair investment includes any spending that ensures an asset necessary for delivery of transportation service to the public or supportive of staff needs remain effective, efficient, reliable, and safe.



**\$15.6B**  
Total Capital Inventory

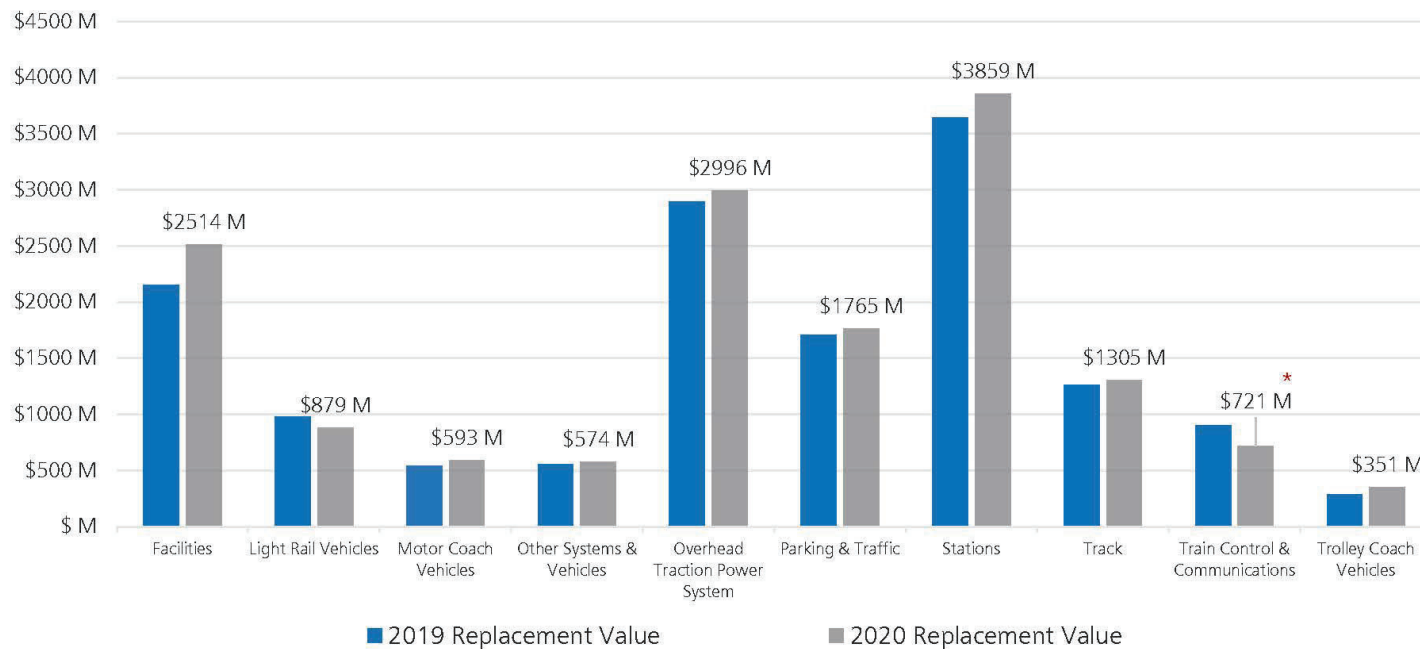


Reference: [2020 SFMTA State of Good Repair Report](#)

### State of Good Repair



**The total SFMTA asset replacement value is estimated at \$15.6 billion.** Asset replacement value provides a baseline when assessing levels of investment across asset classes.

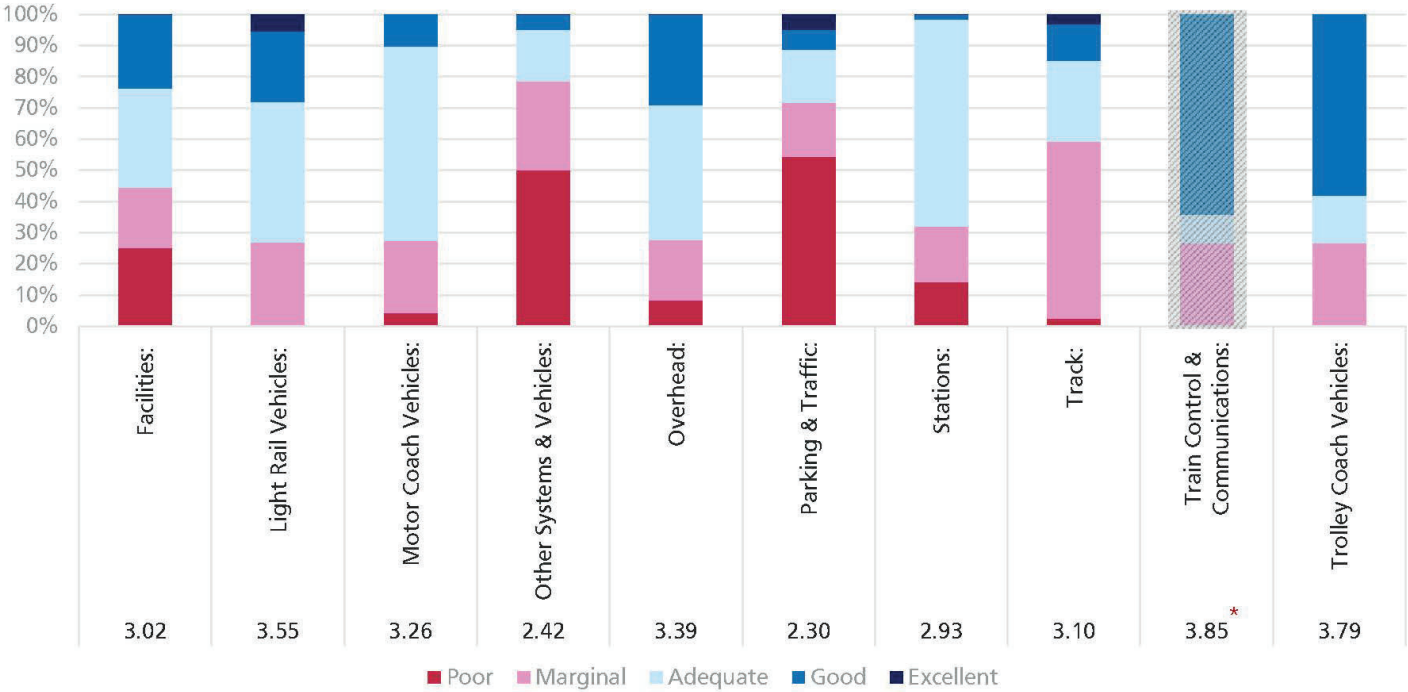


\*The train control system is not accurately modeled in our analysis; we know the system is near the end of its useful life with a higher replacement value than presented in the 2020 SGR Report.

Reference: [2020 SFMTA State of Good Repair Report](#)



**Age Based Condition Scores** are based on the age of an asset and use a scale of 1 to 5. The weighted average condition score for all SFMTA assets in FY2020 is 3.07.



\*The train control system is not accurately modeled in our analysis; we know the system is near the end of its useful life with a higher replacement cost than presented in the 2020 SGR Report.

Reference: [2020 SFMTA State of Good Repair Report](#)



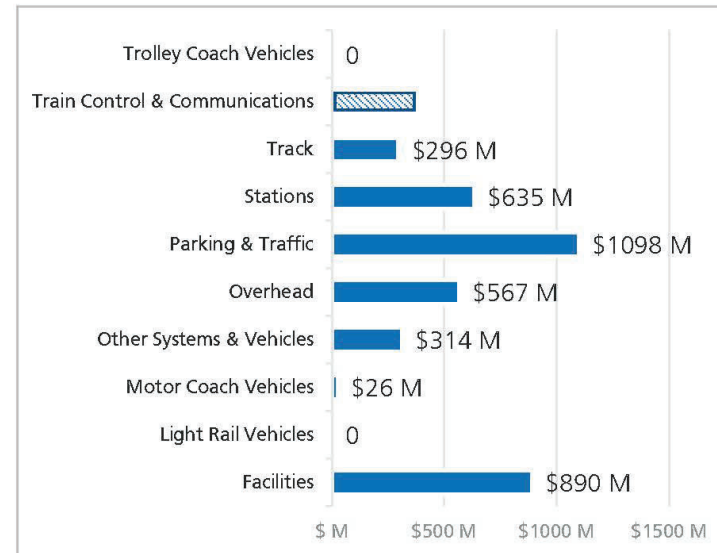
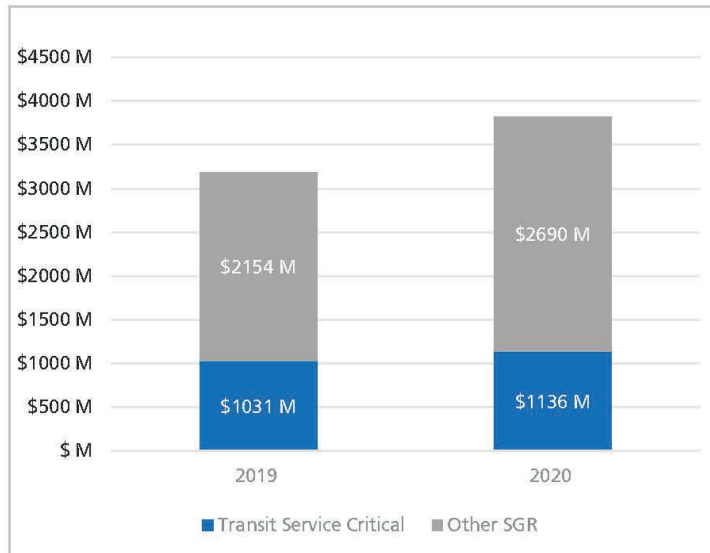
### State of Good Repair



**\$3.83 B**  
Backlog

**The value of assets beyond their useful life is \$3.83 billion.**

This **backlog** represents deferred investments in infrastructure replacement or rehabilitation. The backlog represents assets where an end-of-lifecycle decisions needs to be made; either these assets will be retired, replaced in-kind, or upgraded with new technology or systems.

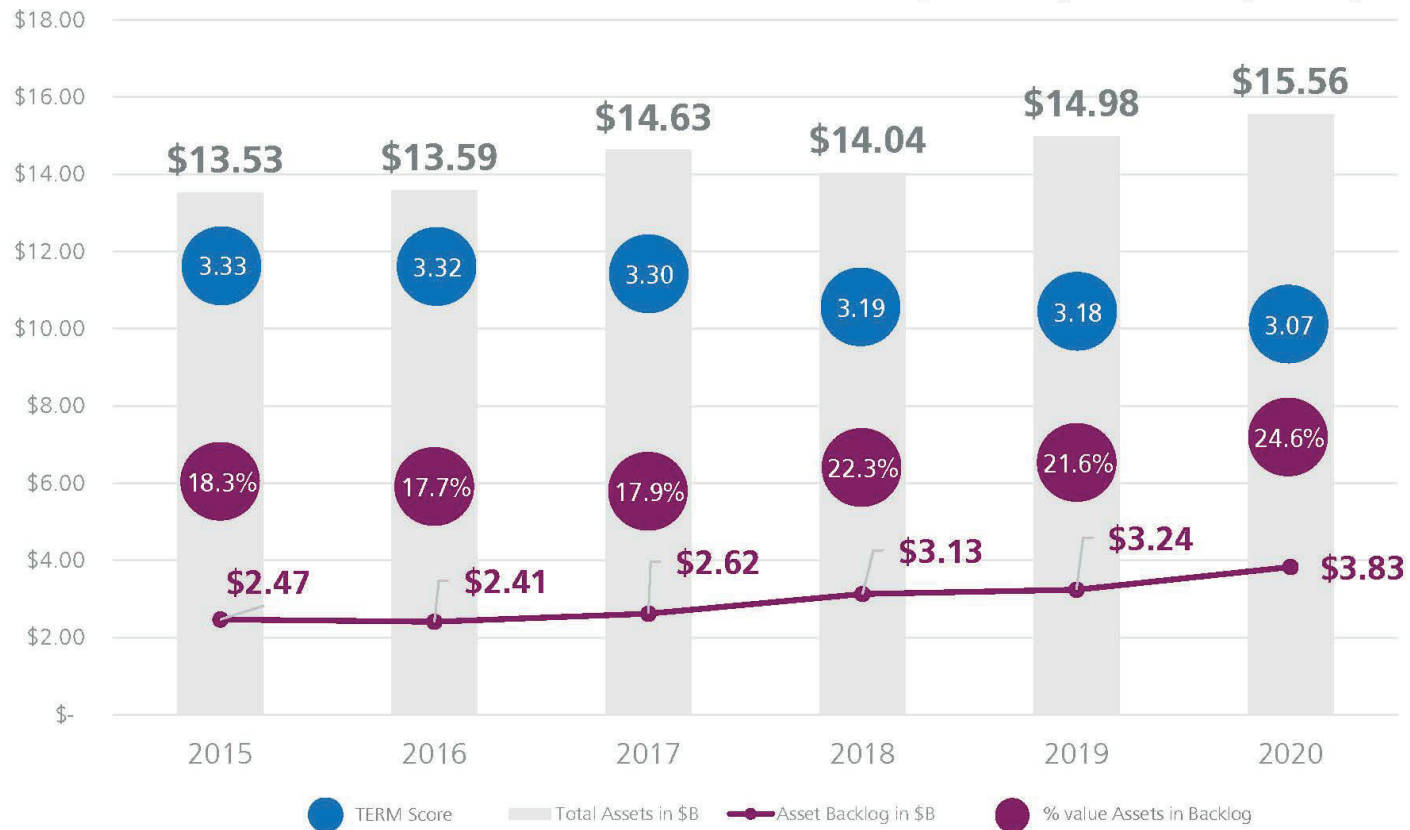


Reference: [2020 SFMTA State of Good Repair Report](#)

### State of Good Repair



### State of Good Repair Key Trends (in \$B)

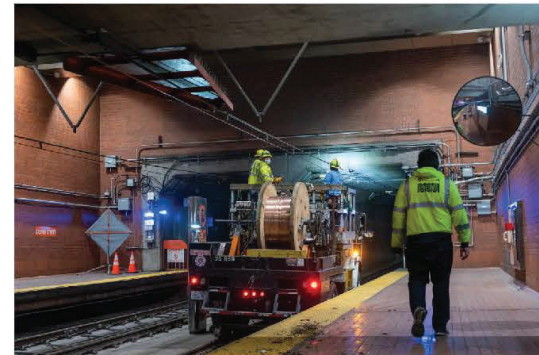
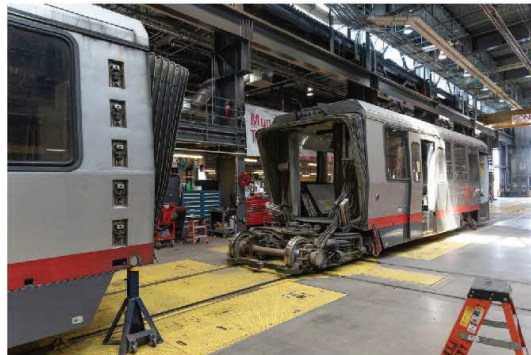


Reference: [2020 SFMTA State of Good Repair Report](#)

## Maintaining, Rebuilding and Replacing Core Transit Infrastructure is Key to Providing Fast and Convenient Transit



- Overhauling vehicles and other preventative maintenance reduces the likelihood of breakdowns, as does replacing them at the end of their useful life.
- Maintaining and replacing facilities maintains safe working conditions ensures sufficient resources for vehicle maintenance and prepares the City to transition to electric buses.
- Guideway repair and maintenance keeps the buses and trains moving.



## Maintenance, Rehabilitation and Replacement of Muni Transit Vehicles

### Financial Need:

- Maintaining transit vehicles, track and stations in a state of good repair.
- **\$7 billion** needed through 2050

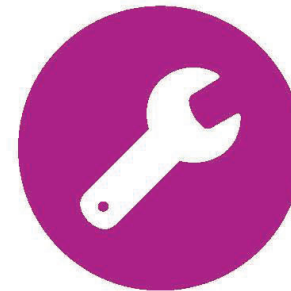
### Available Funding:

- Vehicle replacement is primarily funded by federal funds, which requires at least **30%\*** local funds to indicate local commitment.
- Current revenue projections indicate only **7%** of local match available through 2050.



Reference: [Transportation 2050](#)

\*MTC programs Federal formula funds according to the Transit Capital Priority Program and the Core Capacity Challenge Grant Program, which sets at 75/25 local match in any given year and 70/30 over the 15 – year CCCGP span.



**More Repairs and  
Maintenance**



**Fast and  
Convenient Transit**



## Maintenance, Rehabilitation and Replacement of Muni Transit - Guideways

### Financial Need:

- Maintaining transit vehicles, track and stations in a state of good repair.
- **\$2.5 billion** needed through 2050

### Available Funding:

- Guideway rehab and replacement is funded by a mix of federal and state funds, which requires at least **20%** local funds to indicate local commitment.
- Guideways are anticipated to have more than **20%** unfunded need through 2050.



**More Repairs and  
Maintenance**



**Fast and  
Convenient Transit**

Reference: [Transportation 2050](#)

## Maintenance, Rehabilitation and Replacement of Muni Transit - Facilities

### Financial Need:

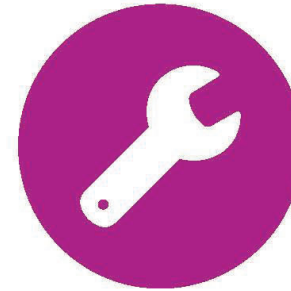
- Maintaining transit vehicles, track and stations in a state of good repair.
- **\$4.9 billion** needed through 2050

### Available Funding:

- Facilities have few dedicated funding sources.
- Federal and State funding is difficult to secure.
- Facilities are only projected to have **12%** of needed revenues through 2050.



\*MTC programs Federal formula funds according to the Transit Capital Priority Program and the Core Capacity Challenge Grant Program, which sets project scores from 8-17. In recent years only score 16 and 17 projects have been successful in receiving funding. Facilities are Score 12 and 13.



**More Repairs and  
Maintenance**



**Fast and  
Convenient Transit**



# SF Sales Tax Reauthorization

Expenditure Plan Advisory Committee

September 23, 2021





## BART is Local

- BART supports **equity**
  - Typical SF resident riding BART today within the City is: a person of color who has an **annual household income under \$50K**, does not own a car, and has been riding BART over 5 years to commute to work
  - BART offers **Clipper START, a fare-discount pilot program** for riders with lower incomes launched in 2020
- **San Franciscans** rely on BART
  - Pre-pandemic, 55,000 people took BART within San Francisco each day – **equivalent to SFMTA's service on Geary Corridor**
  - BART provides **fastest, most affordable point-to-point service in Southeast SF corridor**
- BART supports **sustainability**
  - BART's contracted power supply is **100% greenhouse gas free**

# BART is Local

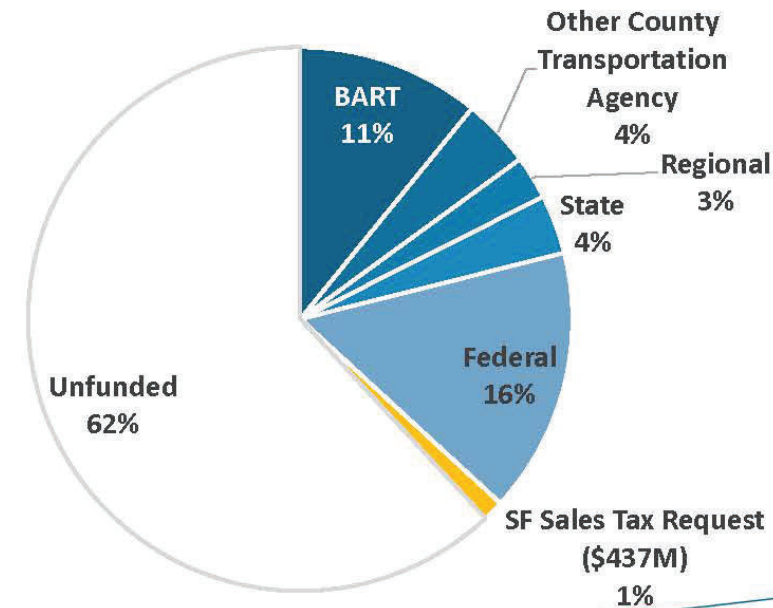
- BART supports **SF employers and workers**
  - Pre-pandemic, **75% of BART weekday trips originated or ended in SF** (310K trips)
  - **73% of SF office space** is located within half mile of downtown BART stations
- BART contributes to San Francisco sales tax and property tax generation
  - Higher SF daytime population drives higher sales tax revenues –  
**BART carries >125K people into SF each weekday** (pre-pandemic)
  - 85% of office AV located within half mile of downtown BART stations –  
**generates \$256M/year in SF property tax** (pre-pandemic)

# BART Maintenance, Rehabilitation and Replacement Example Projects

- **Implementing a Modern Train Control System**  
→ Less standing around on platforms and more frequent train service
- **Replacing broken escalators**  
→ BART ribbon cutting on first of 41 New Escalators in Downtown Station Entrances - Tuesday, Aug 31
- **Construction of new turnarounds and extra tracks**  
→ Reducing the impact of delays
- **Replacing and upgrading power infrastructure**  
→ Supporting reliable service and expanding capacity to support service expansion

SF Sales Tax funds would leverage Measure RR, federal and other funds to keep the BART system reliable and up to date

30-Year Funding Forecast of BART Maintenance, Rehabilitation and Replacement Program





## BART is Investing in Maintenance, Rehabilitation and Replacement in San Francisco

- BART has programmed almost **\$2.1B of \$3.5B BART Measure RR General Obligation bonds** to maintenance, rehabilitation and replacement projects that are **in or benefit San Francisco**
  - BART Measure RR passed in 2016 by voters in SF, Alameda and Contra Costa counties.
- An additional **\$1.5B of other funds have been allocated to these projects**, including:
  - Federal Formula Funds and FTA Capital Investment Grant
  - State Transit and Intercity Rail Capital Program and Solutions for Congested Corridors Program
  - BART Allocations from Operating Budget to Capital Program
  - Other local funding, including contributions from County Transportation Agencies





# BART Measure RR Investments in San Francisco Maintenance, Rehabilitation and Replacement



# BART Maintenance, Rehabilitation and Replacement Major Capital Projects

## Train Control Modernization Program

- Replaces BART's nearly 50-year-old train control system with a new, state-of-the-art communications-based train control system
- Will also enable BART to reduce headways between trains, enabling more frequent and reliable service
- \$1.7 billion project, within larger \$3.5B BART Core Capacity Program (CCP)
- Requesting \$100M SF Sales Tax funds to support CCP
- SF Sales Tax would leverage \$3.4B federal, State, regional, local and BART funds
  - Including \$1.3B federal Capital Investment Grant

## Next Generation Fare Gates

- Retrofit existing fare gates to improve reliability and maintainability
- To improve throughput and reduce passenger queuing at fare gates
- \$90M systemwide project, of which ~\$30M is in San Francisco (including SFO)
- Requesting \$15.7M SF Sales Tax funds
- SF Sales Tax would leverage ~\$75M of federal, local and BART funds
  - \$10M BART Measure RR
  - \$7M Allocations from BART Operating Budget
  - \$18M federal Formula Funds
  - \$39.5M from BART District counties (50% share of county costs)
  - \$15.5M from other counties in which BART operates

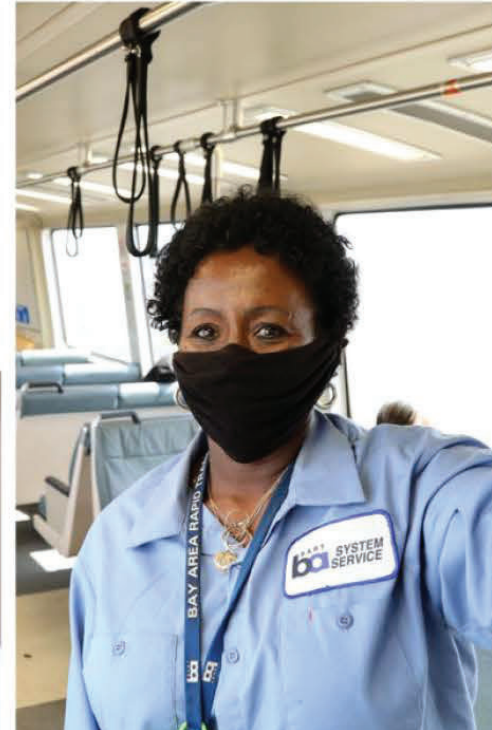


# BART Maintenance, Rehabilitation and Replacement Major Capital Projects

## Elevator Modernization Program

- Will modernize **130 priority elevators** through the BART system
- Essential to ensure elevator availability and **preserve access to BART stations for disability community, bikes and families**
- San Francisco BART station elevators are some of the **heaviest used in the industry**
- Includes **joint use elevators at four downtown BART/ SFMTA stations**
- **\$350 million** total Elevator Modernization Program
- Requesting **\$65M SF Sales Tax funds** to modernize **20 elevators at San Francisco BART stations**
- SF Sales Tax funding would **leverage federal, State, BART and other funds**

Station	Station Elevator	Platform Elevator	Total Number of Elevators	SFMTA/BART Joint Use
16th St. Station	1	1	2	
24th St. Station	1	1	2	
Balboa Park Station		1	1	
Civic Center Station	1	1	2	✓
Daly City Station	2	2	4	
Embarcadero Station	1	1	2	✓
Glen Park Station		1	1	
Montgomery Station	1	1	2	✓
Powell St. Station	1	1	2	✓
SFO Station	2		2	
TOTAL SAN FRANCISCO	10	10	20	





# Caltrain Proposed SF Sales Tax Expenditures

SFCTA Expenditure Plan Advisory Committee

September 23, 2021



# Caltrain Overview

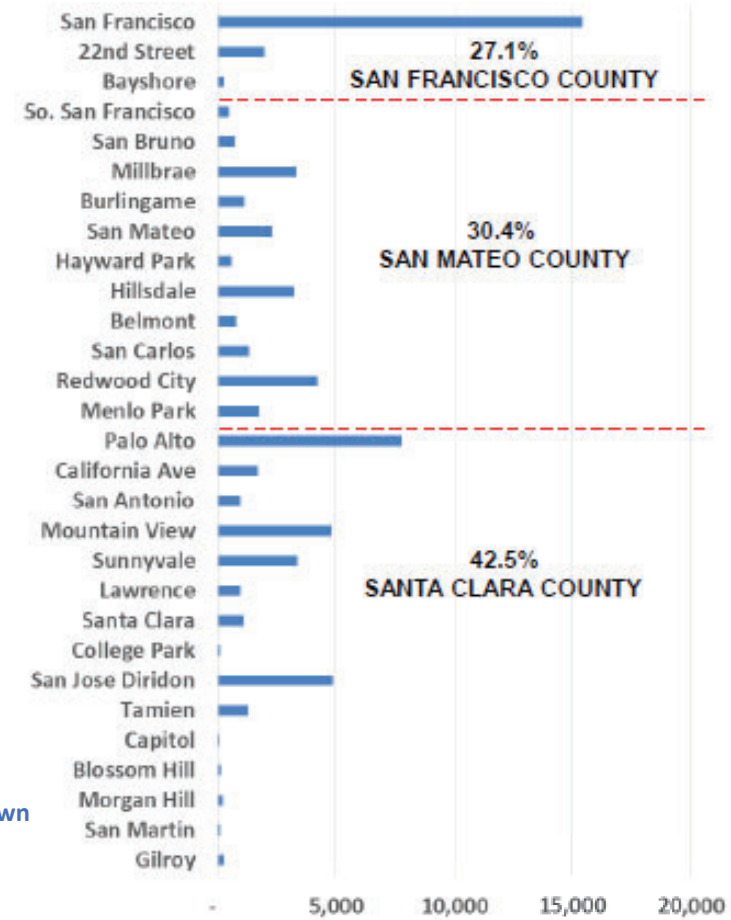
- The Peninsula Corridor Joint Powers Board (JPB) is a joint exercise of powers agency that has administered the operation of Caltrain passenger train services since 1992.
- The JPB's three member agencies include:
  - The City and County of San Francisco
  - The San Mateo County Transit District
  - The Santa Clara Valley Transportation Authority
- All three member agencies share in the costs to operate and maintain Caltrain.
- Caltrain currently operates 104 trains per weekday.



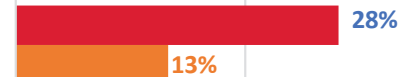
# Caltrain Ridership

- Before the pandemic, Caltrain carried **~65,000-70,000 riders per day** (ridership is currently ~15% of normal due to the pandemic).
- Caltrain has a **bi-directional ridership market**, with consistently strong ridership in the north in San Francisco, in the south in San Jose, and in between on the Peninsula.
- San Francisco 4<sup>th</sup> & King Station is Caltrain's busiest station.**

2018 Average Weekday Boardings



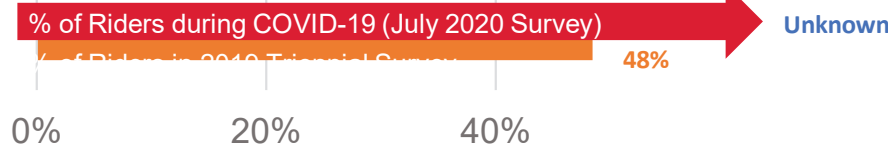
Share of riders that qualify for **low income housing assistance**



Share of riders that live in households earning **less than \$100k** per year



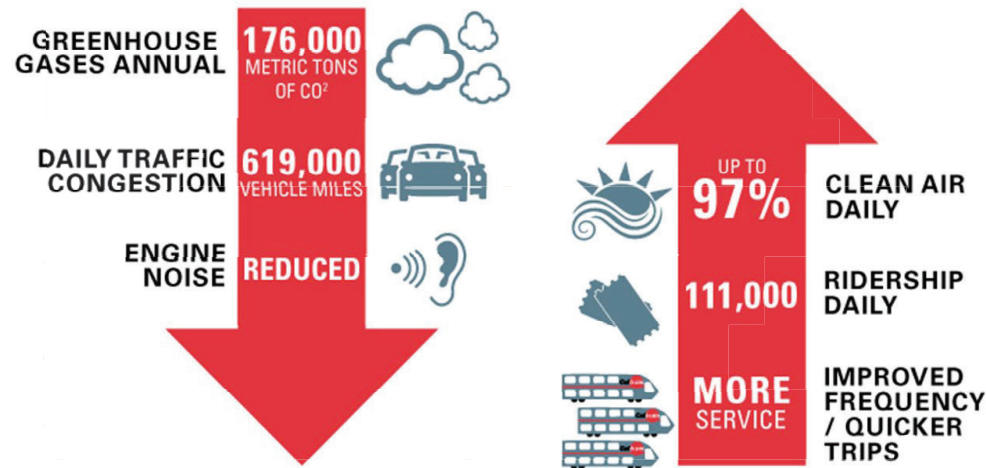
Share of riders that **did not have a car**





# Caltrain Electrification

- Caltrain is in the process of **electrifying 51 miles** of its corridor from San Francisco's 4th and King Station to Tamien Station in San Jose.
- Caltrain Electrification will



Project Area: San Francisco to San Jose



# San Francisco Context

Caltrain continues to work with our San Francisco partners to advance and enhance rail infrastructure and services.

We're actively coordinating with key partners, including:

- San Francisco County Transportation Authority (SFCTA)
- San Francisco Planning (SF Planning)
- Transbay Joint Powers Authority (TJPA)



# Caltrain Maintenance, Rehabilitation, and Replacement



## Why make this investment?

Annual investment in this capital program is critical for keeping the railroad in a state of good repair so that Caltrain service may continue to safely operate.

## What will be funded?

Caltrain's annual state of good repair program, including the upgrade, rehabilitation, and replacement of:

- Caltrain's trains and their components
- Stations and access facilities
- Signals and communications equipment
- Fare collection equipment
- Other equipment and facilities that are required to operate Caltrain service

# Caltrain Maintenance, Rehabilitation, and Replacement

## What other funding sources can be used for these investments?

**Local contributions are crucial** to help leverage funding from State and Federal sources for state of good repair investments in Caltrain's facilities and equipment.

Local contributions enable Caltrain to keep its trains in a state of good repair **by funding routine, ongoing train maintenance projects.**

## How much funding does Caltrain receive annually?

Federal Funding: \$13.6 million (requires minimum 20% match)

State Funding: \$8.5-\$13.5 million

**Member contributions are needed to supplement this funding**, with all three members sharing equally in state of good repair costs: \$5-\$7.5 million per member agency.

## Notable funding source limitations

**Federal sources:** The Metropolitan Transportation Commission's (MTC) funding policies place restrictions on Federal funding sources and limit their use on train maintenance projects to major vehicle replacement and overhaul projects, which are only completed every ~15 years or so.

**Measure RR:** a 1/8 cent sales tax in the three counties, passed in 2020 by voters in for Caltrain's operating and capital needs.

- In the near and mi-term, the vast majority of Measure RR funds are anticipated to be needed to support Caltrain operations each year.
- It is not expected that Measure RR funds will be able to fully cover Caltrain's state of good repair costs - **outside sources such as local contributions from the three member agencies will continue to be needed.**





**Thank you!**

# Questions?



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# Agenda Item 7.

## Paratransit



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September 23, 2021


## Paratransit



- Older adults are the fastest growing age group in San Francisco: **nearly 30% of San Francisco residents will be age 60 or older by 2030<sup>1</sup>**
- Average annual trips provided (in the last 5 years pre-COVID): **762,000**
- On average, the current sales tax has funded about **40% of the SFMTA paratransit operating budget**



<sup>1</sup>San Francisco Department of Disability and Aging Services, 2018



San Francisco Transportation Sales Tax Reauthorization

# Access & Equity: Paratransit Program

Expenditure Plan Advisory Committee  
September 23, 2021

**Transportation 2050**



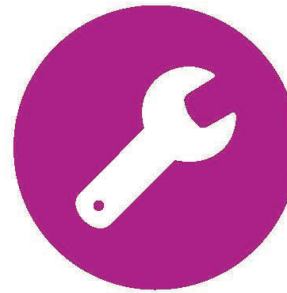
**Sales Tax is an integral part of the transportation  
funding ecosystem to realize  
San Francisco's Transportation Vision.**



**Investing  
Equitably**



**Fast and  
Convenient Transit**



**More Repairs and  
Maintenance**



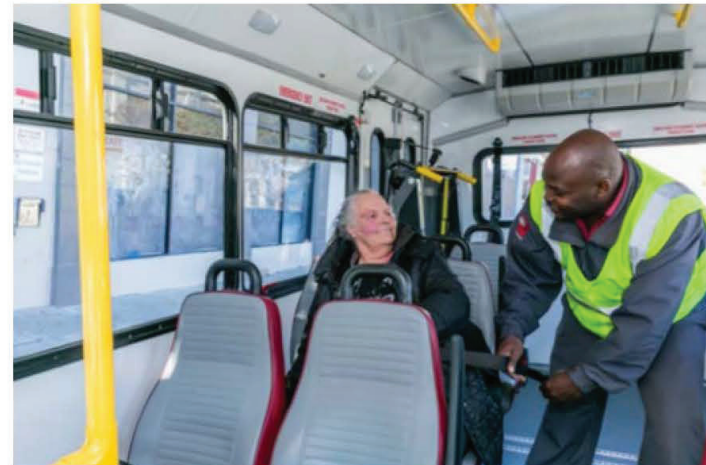
**Improving Safety  
and Access**



## San Francisco Paratransit Program



- **SF Access**
  - Traditional ADA service – prescheduled, door-to door shared van
- **Group Van Service**
  - Group transportation to/ from single location
- **Taxis**
  - Same day, general public taxis, includes 40 wheelchair accessible taxis
  - All SF taxis required to participate



### Pandemic Innovation:

**Essential Trip Card Program** – a subsidized Taxi Trip for seniors/disabled to complete essential trips. Over 3,600 registered riders have completed over 52,000 trips.

## San Francisco Paratransit Service

### Financial Need:

- Maintaining Paratransit Service and Paratransit Vehicles and Facilities.
- Over \$1.3 billion needed to operate service through 2050.

### Available Funding:

- 40% of funding has come from transportation sales tax on average over the *current* expenditure plan.
- Other major fund sources are federal formula fund set asides, contributions from other operators for providing service, and the SFMTA Operating Budget.

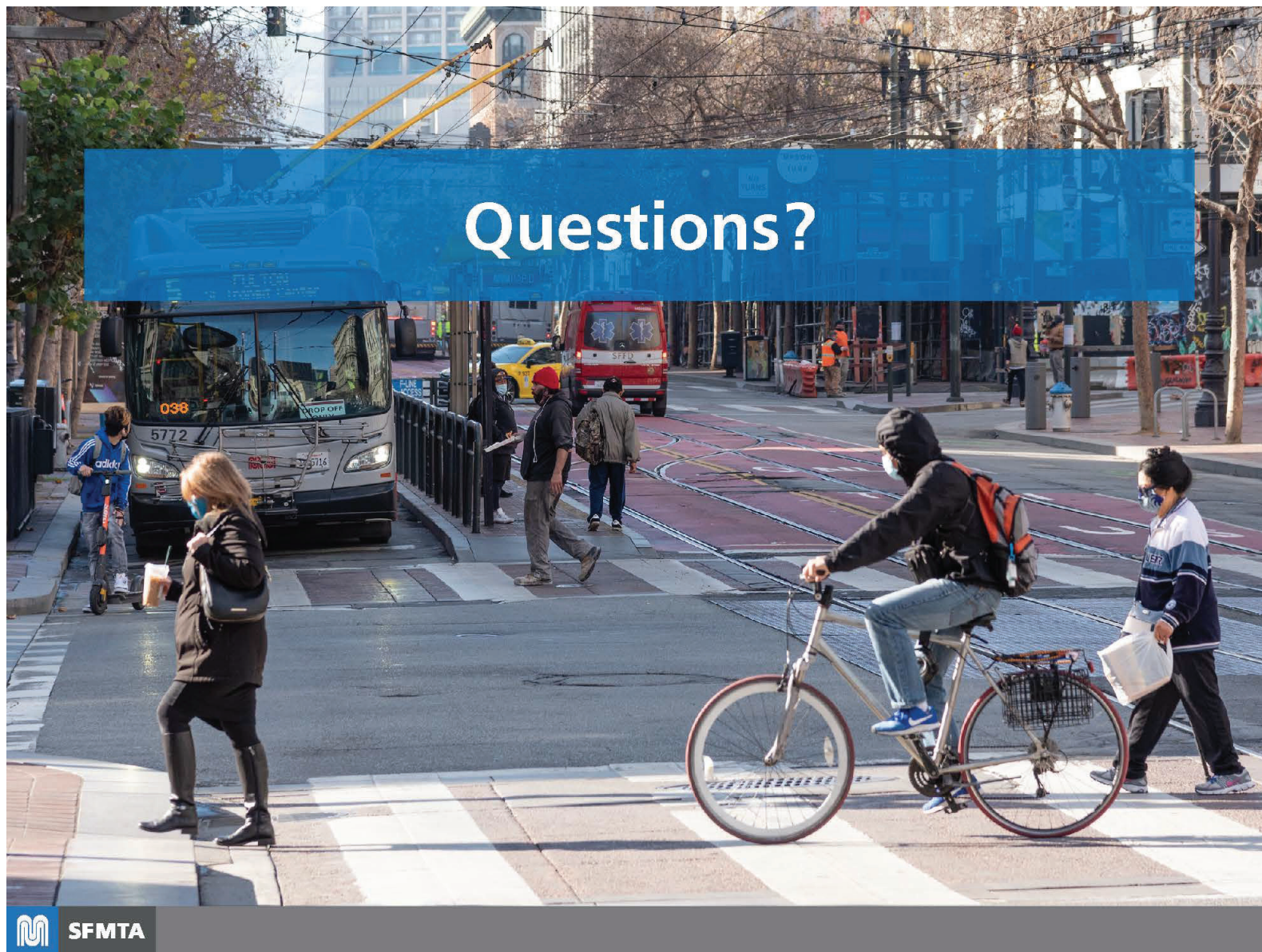


Improving Safety  
and Access



Investing  
Equitably





# Breakout Discussions



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## Preliminary Draft New Expenditure Plan



How can the EPAC help shape the Expenditure Plan?



Eligibility of different types of projects



Relative funding levels for different programs



Policies (e.g. administration, prioritization)

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## Discussion Questions

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1. Do you understand **the need** for the programs, and why they need sales tax funds?
2. Do you have questions about or feedback on the **program descriptions**?
3. **How important** are each of these programs to you?

## **DRAFT New Expenditure Plan Program Description**

### **Paratransit**

At each EPAC meeting, Transportation Authority staff will provide draft program descriptions for the programs to be discussed at that meeting. This language defines the types of projects eligible in each proposed New Expenditure Plan program, and names a sponsor agency or agencies who will be eligible to receive funding from the program. The final language will include the recommended sales tax funding amounts, including funding from the conservative forecast (referred to as Priority 1) and, as recommended, funding from the more optimistic forecast (referred to as Priority 2).

This initial draft language was prepared with sponsor agency input using:

- The Transportation Authority's Needs Assessment developed for the San Francisco Transportation Plan 2050, including funding and program needs from all the transportation agencies serving San Francisco
- Proposition K sales tax program descriptions, updated to reflect lessons learned and to address the current needs of the sponsor agencies.

Over the course of its meetings, the EPAC will work with staff to finalize this language.

### **Paratransit**

#### **Preliminary Draft New Expenditure Plan**

Continued support for paratransit door-to-door van and taxi services for seniors and people with disabilities who are unable to use fixed route transit service. Includes operations support, replacement of accessible vans, and replacement and upgrades of supporting equipment such as debit card systems. Sponsoring Agency: SFMTA. Total Funding: TBD; New EP: \$205M.

#### **Prop K Expenditure Plan Description**

*Continued support for paratransit door-to-door van and taxi services for seniors and people with disabilities who are unable to use fixed route transit service. Includes operations support, phased replacement of accessible vans, and replacement and upgrades of supporting equipment such as debit card systems. Sponsoring Agency: MUNI. The first \$201.9M is Priority 1. The next \$24.1M is Priority 2, and the remainder is Priority 3. Total Funding: \$396.3M; Prop K: \$291M.*

### **Acronyms**

New EP - New Expenditure Plan; SFMTA - San Francisco Municipal Transportation Agency; and TBD - To Be Determined



## Prop K Sales Tax - Paratransit

This fact sheet provides some highlights of the Paratransit program in the Prop K half-cent transportation sales tax Expenditure Plan. This is the current sales tax program that is in effect, approved by San Francisco voters in 2003.

- The San Francisco Municipal Transportation Agency (SFMTA) provides paratransit service to seniors and persons with disabilities who are unable to use Muni's regular fixed route service. The SFMTA's paratransit program, includes:
  - Door-to-door shared van service
  - Shop-a-Round / Van Go Shuttles
  - Ramp Taxi Incentive Program
  - Essential Trip Card Program (during COVID-19 pandemic)
- The SFMTA has provided, on average, 762,000 paratransit trips per year in the last 5 years pre-COVID.<sup>1</sup>
- The paratransit program is the only operating program funded by the Prop K sales tax. Over the life of the Prop K Expenditure Plan, the paratransit program will receive 8.6% of sales tax revenues collected.
- Since the inception of Prop K (2003) the half-cent sales tax has, on average, provided 42% of funding for the SFMTA's paratransit program based on the budget at the time of allocation. SFMTA estimates the Prop K share to be about 40% based on final budgets reflecting de-obligation of Prop K sales tax and/or other budgeted funds. (See Table 1 and Figure 1 for annual budget and Prop K share details.)
- Prop K funds are well leveraged by other federal, state and local funds used to support SFMTA's paratransit program. As an example, for the current fiscal year starting July 1, 2021, Prop K sales tax provided \$10.2 million for paratransit of a \$32.6 million contract budget (see Table 2).
- We advanced funds for the paratransit program to help keep up with increased costs and demand which increased faster than the revenue sources that support paratransit. While this has contributed to the stability of the SFMTA's paratransit program, we expect that Fiscal Year 2024/25 will be the last full year of funding for paratransit from the Prop K sales tax (with about a half year of funding in FY 2025/26).<sup>2</sup>

<sup>1</sup> Data provided by Jonathan Cheng, SFMTA Paratransit Program manager

<sup>2</sup> Transportation Authority 2017 Prop K Strategic Plan as amended (09.17.2021)





**Table 1: SFMTA Paratransit Program: Prop K Sales Tax Share of Funding<sup>3</sup>**

Amounts are based on budget provided at time of allocation of funds by the SFCTA Board.

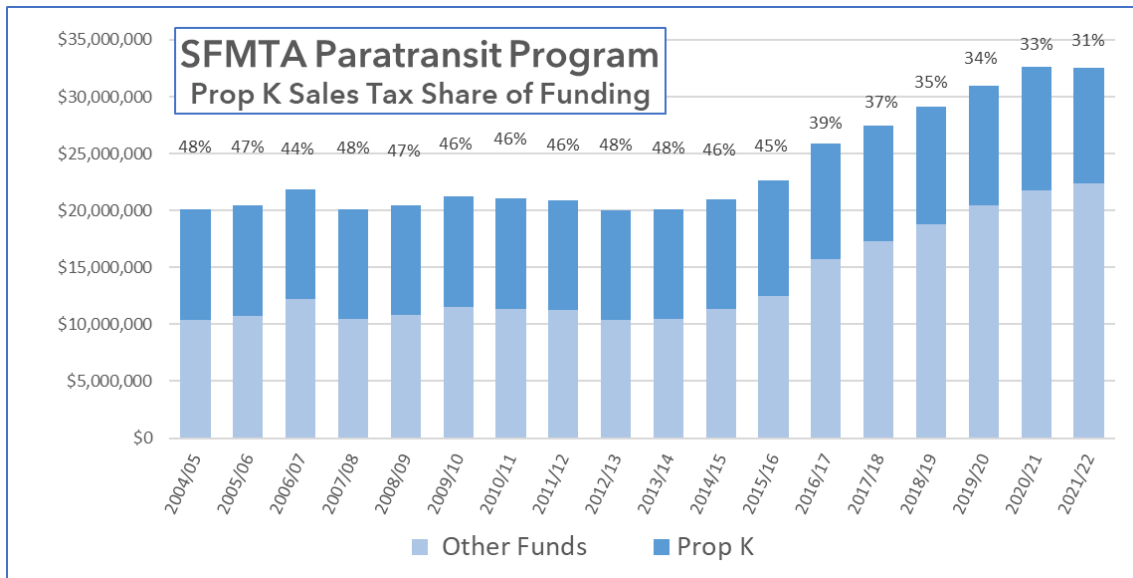
Budget Year	Total SFMTA Paratransit Budget	Sales Tax Funding	Sales Tax Fund Share
FY 2004/05	\$ 20,082,520	\$ 9,670,000	48%
FY 2005/06	\$ 20,417,999	\$ 9,670,000	47%
FY 2006/07	\$ 21,867,483	\$ 9,670,000	44%
FY 2007/08	\$ 20,139,537	\$ 9,670,000	48%
FY 2008/09	\$ 20,494,048	\$ 9,670,000	47%
FY 2009/10	\$ 20,006,595	\$ 9,670,000	46%
FY 2010/11	\$ 19,166,319	\$ 9,670,000	46%
FY 2011/12	\$ 19,709,531	\$ 9,670,000	46%
FY 2012/13	\$ 19,047,651	\$ 9,670,000	48%
FY 2013/14	\$ 19,606,050	\$ 9,670,000	48%
FY 2014/15	\$ 21,021,739	\$ 9,670,000	46%
FY 2015/16	\$ 22,651,133	\$ 10,193,010	45%
FY 2016/17	\$ 25,372,752	\$ 10,193,010	39%
FY 2017/18	\$ 26,709,789	\$ 10,193,010	37%
FY 2018/19	\$ 28,560,887	\$ 10,321,010	35%
FY 2019/20	\$ 29,354,462	\$ 10,500,472	34%
FY 2020/21	\$ 28,708,996	\$ 10,930,724	33%
FY 2021/22	\$ 32,572,974	\$ 10,233,010	31%
Annual Average Sales Tax Share:			42%

<sup>3</sup>Source: Prop K Allocations, 2004/05-2021/22.



**Figure 1: SFMTA Paratransit Program: Average Annual Prop K Sales Tax Share of Funding<sup>4</sup>**

Amounts are based on budget provided at time of allocation of funds by the SFCTA Board.



<sup>4</sup>Source: Prop K Allocations, 2004/05-2021/22.

**Table 2. Fiscal Year 2021/22 SFMTA Paratransit Budget<sup>5</sup>**

Funding Type	Fund Source	Funding Amount	Fund Share
Local	SMFTA Operating Budget	\$11,186,500	35%
Local	Prop K Half-Cent Sales Tax	\$10,223,010	32%
Federal	FTA Section 5307	\$4,782,205	15%
State	State Transit Assistance	\$3,012,914	9%
Local	BART	\$2,155,785	7%
Local	Department of Disabled and Aging Services	\$800,000	2%
<b>Total Funding</b>		<b>\$32,170,414</b>	<b>100%</b>

<sup>5</sup>Source: Prop K Allocation Request Form (SFCTA Resolution 22-002, July 27, 2021)

# Report Out



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# Agenda Item 8.

# Adjournment



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September 23, 2021