

Agenda Item 4b.

Draft Expenditure Plan Policies: Focus on Prioritization Process



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January 13, 2022

Draft Expenditure Plan Structure



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The Draft Expenditure Plan has 5 sections:

1. Introduction
2. General Provisions
3. Expenditure Plan Summary Table
4. Description of Programs
5. Implementation Provisions (e.g. Project Prioritization)



Most policies are carried forward from the existing Expenditure Plan, such as:

- No substitution of sales tax for local revenues for transportation
- If assets are purchased with sales tax, must return proportional share of proceeds
- No expenditures outside of SF, with exceptions

The most significant revisions are:

- **Prioritization process updates, including equity**
- Project delivery oversight (NEW)
- Cost savings provision (NEW)

Prioritization Process Takeaways



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- How we prioritize projects
- How process reflects transparency and accountability
- Importance of flexibility for a 30 year plan

Project Prioritization Process



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How do we determine which projects to fund when for each of the programs in the Expenditure Plan?

- Every 5 years, we develop a **5-Year Prioritization Program (5YPP)** to identify projects to be funded in each program over the next 5-year period.



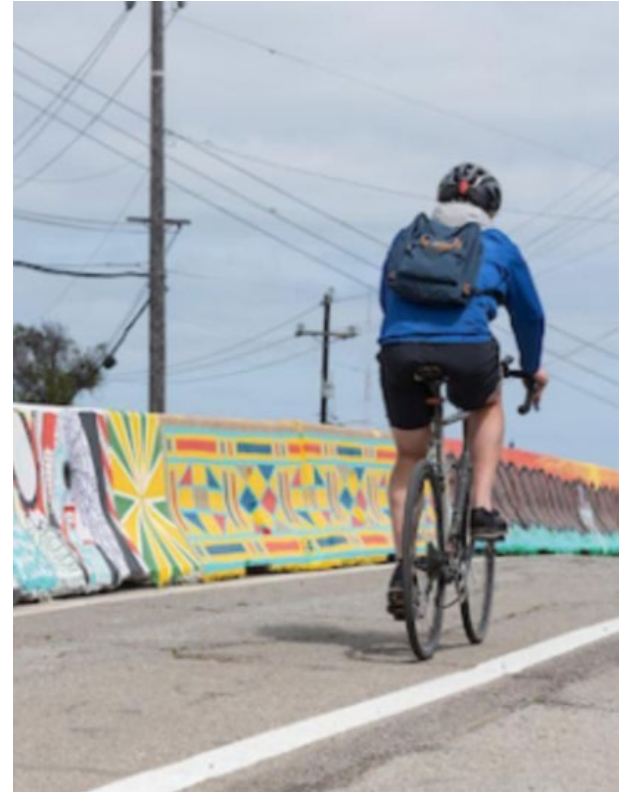
Project Prioritization Process



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5YPP Benefits:

- Provides transparency for how projects are prioritized
- Provides opportunities for public and Board input
- Encourages coordination between categories and sponsors
- Establishes a pipeline of projects, helping to position projects for discretionary funding opportunities



Project Prioritization Process



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Key pieces of the **5YPP** are the

- Prioritization methodology and
- 5-year list of projects
 - Project information forms with scope, schedule, cost, and funding



Program-Wide Prioritization Criteria

- Project Readiness
- Community Support
- Time Sensitive Urgency

Category Specific Prioritization Criteria

- Varies by category



Sample Prop K Prioritization Methodology



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Traffic Calming

Traffic Calming	Prop K Program-wide Criteria			Category Specific Criteria				
Program	Project Readiness	Community Support	Time Sensitive Urgency	Safety	Provides Benefits to Multiple Users	High Injury Corridor	Leveraging	Total



Facilities

Facilities	Prop K Program-wide Criteria			Category Specific Criteria			
Program	Project Readiness	Community Support	Time Sensitive Urgency	Safety	Leveraging	Improves Efficiency of Transit Operations	Total

Asset age is also used frequently for maintenance and rehabilitation programs

Sample Prop K Prioritization Methodology



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New Signals and Signs

New Signals & Signs	Prop K Program-wide Criteria			Category Specific Criteria			
Program	Project Readiness	Community Support	Time Sensitive Urgency	Safety	Benefits to Multiple Users	Supports Transit First	Total



Required 5YPP Criteria (minimum):

- Relative level of need or urgency
- Cost-effectiveness
- Fair geographic distribution that takes into account various needs of SF neighborhoods
- **Level and diversity of community support (UPDATED)**
- **Benefit to disadvantaged populations (NEW)**



Required information to support project prioritization (minimum):

- Project readiness, including **documented community support**
- Funding plan
- Compatibility with existing/planned land uses; supportiveness of planned growth
- Project benefits
- **How the project would advance equity or seek to mitigate any impacts on equity (NEW)**



Open and public process for 5YPP development

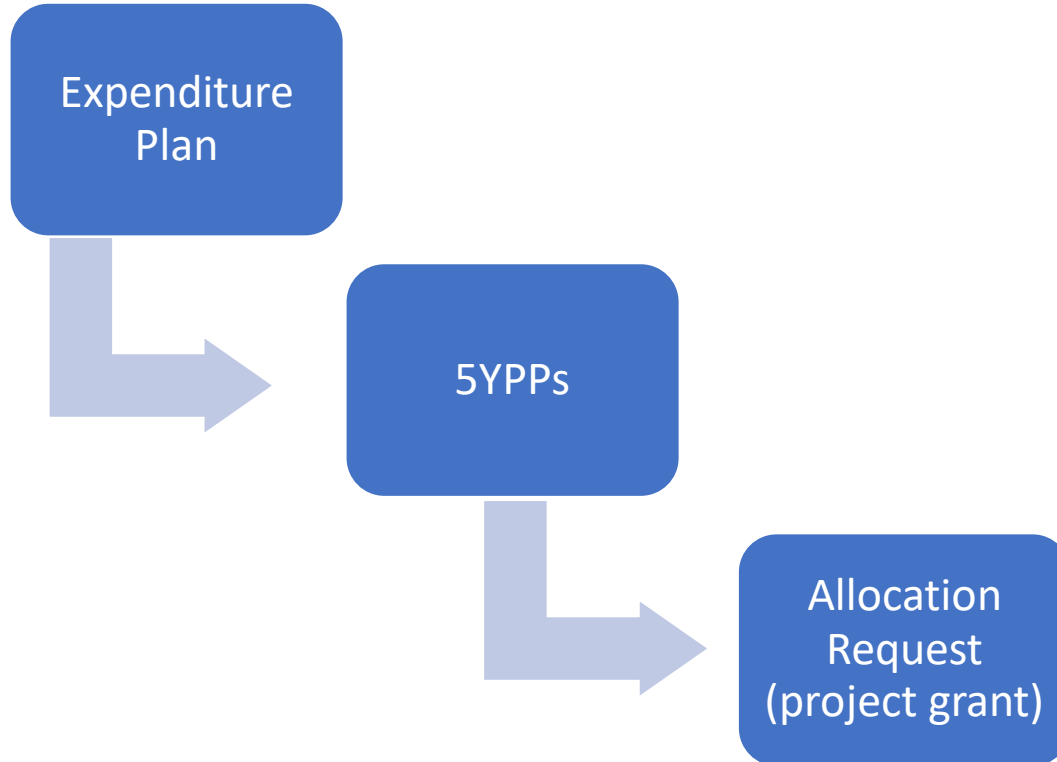
- Inclusive planning process for development of the 5YPPs
- Board and Community Advisory Committee process



Transparency & Accountability



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The Transportation Authority Community Advisory Committee and Board approve the 5YPPs and allocation requests, providing opportunities for public engagement and oversight.

Questions?



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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



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