Agenda Item 5.

Draft Expenditure Plan Discussion: Focus on Prioritization Process
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
Draft Expenditure Plan Policies

The most significant revisions are:

• Prioritization process updates, including equity
• Project delivery oversight (NEW)
• Cost savings provision (NEW)
Prioritization Process Takeaways

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

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.
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

Key pieces of the 5YPP are the

• Prioritization methodology and

• 5-year list of projects
  • Project information forms with scope, schedule, cost, and funding
Current Prop K 5YPP Prioritization

Program-Wide Prioritization Criteria

- Project Readiness
- Community Support
- Time Sensitive Urgency

Category Specific Prioritization Criteria

- Varies by category
**Sample Prop K Prioritization Methodology**

### Traffic Calming

<table>
<thead>
<tr>
<th>Traffic Calming</th>
<th>Prop K Program-wide Criteria</th>
<th>Category Specific Criteria</th>
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</thead>
<tbody>
<tr>
<td>Program</td>
<td>Project Readiness</td>
<td>Safety</td>
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<td></td>
<td>Community Support</td>
<td>Provides Benefits to</td>
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<tr>
<td></td>
<td>Time Sensitive Urgency</td>
<td>Multiple Users</td>
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<tr>
<td></td>
<td>Safety</td>
<td>High Injury Corridor</td>
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<td></td>
<td>Safety</td>
<td>Leveraging</td>
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</table>
## Sample Prop K Prioritization Methodology

### Facilities

<table>
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<tr>
<th>Facilities</th>
<th>Prop K Program-wide Criteria</th>
<th>Category Specific Criteria</th>
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<tbody>
<tr>
<td>Program</td>
<td>Project Readiness</td>
<td>Safety</td>
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<td>Community Support</td>
<td>Leveraging</td>
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<tr>
<td></td>
<td>Time Sensitive Urgency</td>
<td>Improves Efficiency of Transit Operations</td>
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</table>

Asset age is also used frequently for maintenance and rehabilitation programs.
## Sample Prop K Prioritization Methodology

### New Signals and Signs

<table>
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<th>Prop K Program-wide Criteria</th>
<th>Category Specific Criteria</th>
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Proposed Prioritization Process

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)
Proposed Prioritization Process

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)
Proposed Draft Expenditure Plan 5YPP

Open and public process for 5YPP development

• Inclusive planning process for development of the 5YPPs

• Board and Community Advisory Committee process
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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