Agenda Item 5.

Draft Expenditure Plan Discussion: Focus on Prioritization Process

San Francisco
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Authority

January 27, 2022

Draft Expenditure Plan Structure

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)

Draft Expenditure Plan Policies

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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

- 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.
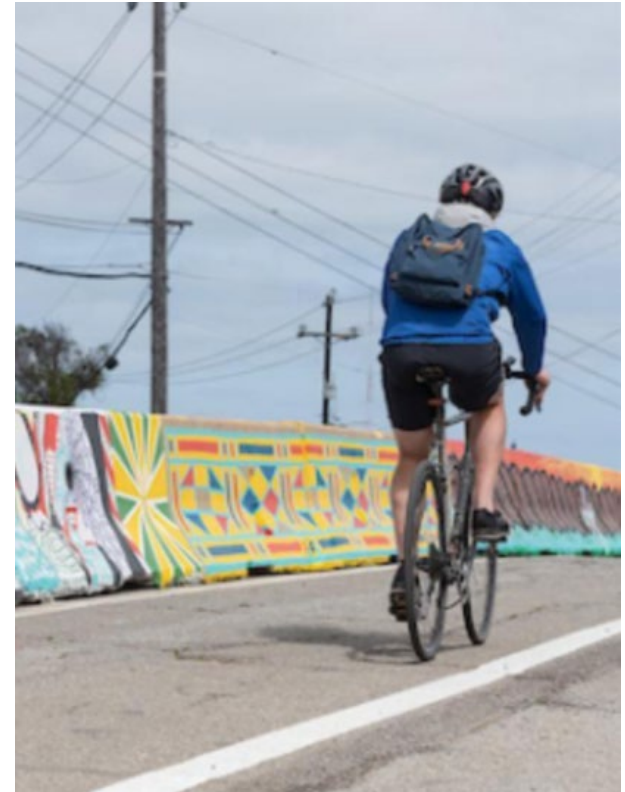
Project Prioritization Process

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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
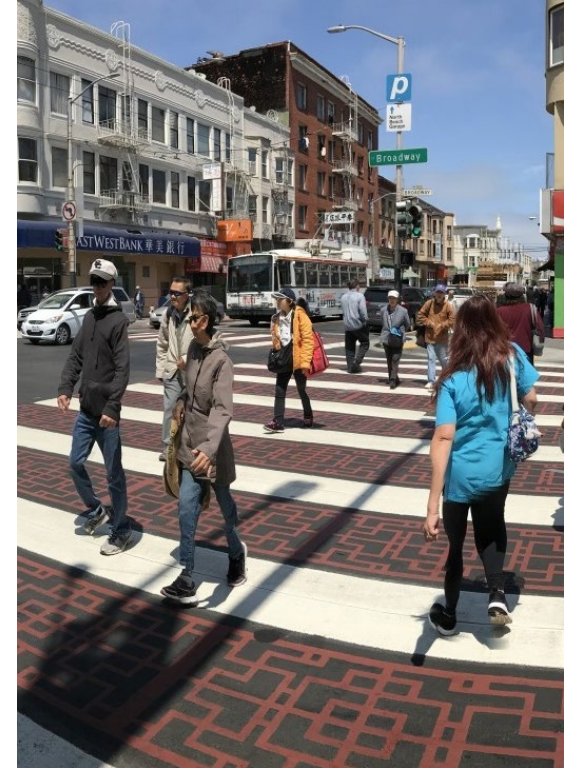
Project Prioritization Process

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

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

Sample Prop K Prioritization Methodology

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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

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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

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

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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)**
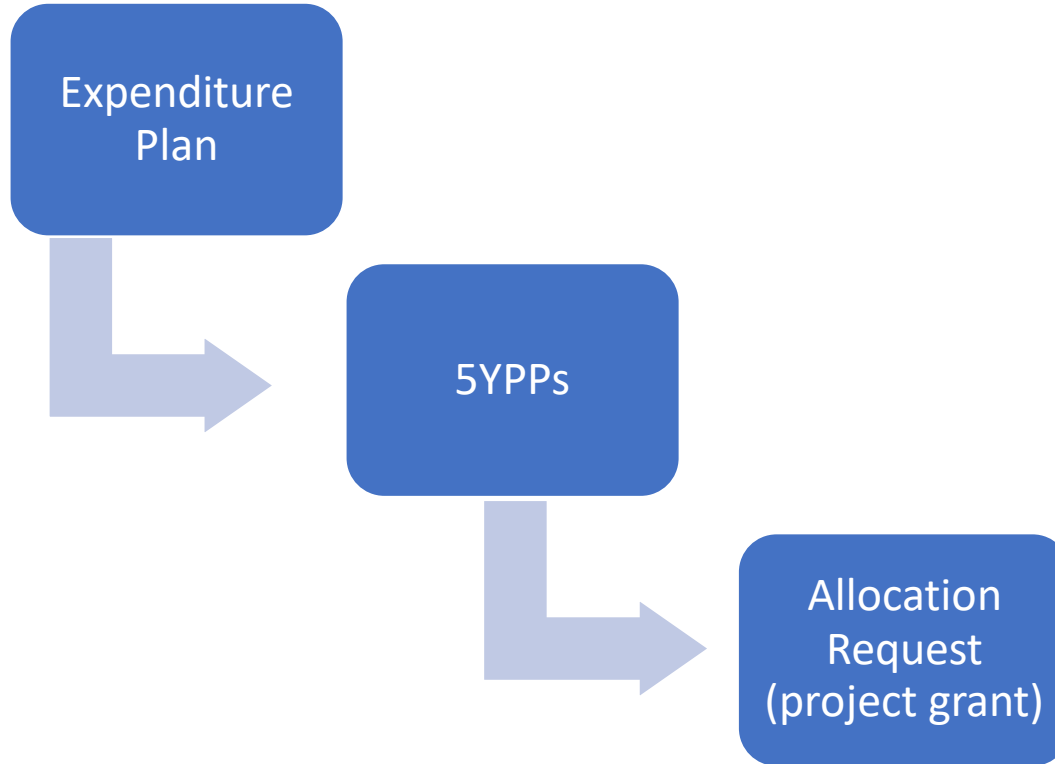
Proposed Draft Expenditure Plan 5YPP

Open and public process for 5YPP development

- Inclusive planning process for development of the 5YPPs

- Board and Community Advisory Committee process

Transparency & Accountability

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Expenditure Plan

5YPPs

Allocation Request (project grant)

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

Questions?

San Francisco County Transportation Authority

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