



# AGENDA

## Expenditure Plan Advisory Committee Meeting Notice

**Date:** Thursday, February 10, 2022; 6:00 – 8:00 p.m.

**Location:** Join Zoom Meeting <https://us02web.zoom.us/j/89318104565>  
Meeting ID: 893 1810 4565  
One tap mobile:  
+19292056099,,89318104565# US (New York)  
+13126266799,,89318104565# US (Chicago)  
Dial by your location  
+1 669 900 6833 US (San Jose)  
+1 929 205 6099 US (New York)  
+1 301 715 8592 US (Washington DC)  
+1 312 626 6799 US (Chicago)  
+1 253 215 8782 US (Tacoma)  
+1 346 248 7799 US (Houston)  
877 853 5247 US Toll-free  
888 788 0099 US Toll-free  
833 548 0276 US Toll-free  
833 548 0282 US Toll-free  
Meeting ID: 893 1810 4565  
Find your local number: <https://us02web.zoom.us/u/k0dpnHpn7>

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

This meeting will be held remotely and will allow for remote public comment pursuant to AB 361, which amended the Brown Act to include Government Code Section 54953(e) and empowers local legislative bodies to convene by teleconferencing technology during a proclaimed state of emergency under the State Emergency Services Act so long as certain conditions are met.

**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. When called upon, unmute yourself or dial \*6. In order to get the full Zoom experience, please make sure your application is up to date.

**Written public comment** may be submitted prior to the meeting by emailing the Clerk of the Transportation Authority at [clerk@sfcta.org](mailto:clerk@sfcta.org) or sending written comments to Clerk of the Transportation Authority, 1455 Market Street, 22nd Floor, San Francisco, CA 94103. Written comments received by 8 a.m. on the day of the meeting will be



distributed to Expenditure Plan Advisory Committee members before the meeting begins.

### **Agenda**

	<b>Page</b>
1. Roll Call	
2. EPAC Chair's Remarks - <b>INFORMATION</b>	<b>3</b>
3. Meeting #9 Recap, Minutes and Follow-ups - <b>INFORMATION*</b>	<b>8</b>
4. Draft Expenditure Plan Discussion - <b>INFORMATION*</b>	<b>25</b>
<p>At this meeting, we will continue the EPAC discussion from the prior meeting with the intent of firming up EPAC agreement on as many of the programs as we can at this penultimate meeting of the EPAC. Staff will present some proposed program refinements to consolidate a few programs as requested by project sponsors with no net funding level changes; review the informal zoom poll results from the January 27 EPAC meeting; and present one to two new scenarios to support discussion that have been informed by the zoom poll, EPAC input, community engagement and sponsor agency input. A complete draft Expenditure Plan is included in the agenda materials in three pieces for ease of reference to support the EPAC's continuing tradeoff discussions: Attachment 1 - Draft Expenditure Plan policies, Attachment 2 - Draft Expenditure Plan Summary Table showing amounts recommended by program for Priority 1 (most conservative revenue forecast) (revised October 4, 2021), and Attachment 3 - Draft Description of Programs.</p>	
5. Public Comment	<b>61</b>
<p>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.</p>	
6. Adjournment	

### **\*Additional Materials**

-----

To request sign language interpreters, readers, large print agendas or other accommodations, please contact the Clerk of the Transportation Authority at (415) 522-4800. Requests made at least 48 hours in advance of the meeting will help to ensure availability.

If any materials related to an item on this agenda have been distributed to the Expenditure Plan Advisory Committee after distribution of the meeting packet, those materials will be available for public inspection at the Transportation Authority at 1455 Market Street, Floor 22, San Francisco, CA 94103, during normal office hours.

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance [SF Campaign & Governmental Conduct Code Sec. 2.100] to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 25 Van Ness Avenue, Suite 220, San Francisco, CA 94102; (415) 252-3100; [www.sfethics.org](http://www.sfethics.org).

# Expenditure Plan Advisory Committee (EPAC)

## Meeting #10



San Francisco  
County Transportation  
Authority

February 10, 2022

---

## Using Zoom

---

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

e.g. Michelle Beaulieu, EPAC

**Having Trouble?**

Send chat (Chats only go to project team.)



San Francisco  
County Transportation  
Authority

---

# Agenda

---

1. Roll Call
2. EPAC Chair's Remarks
3. Meeting #9 Recap, Minutes and Follow-ups
4. Draft Expenditure Plan Discussion
5. Public Comment
6. Adjournment



San Francisco  
County Transportation  
Authority

# Agenda Item 1.

## Roll Call



**San Francisco  
County Transportation  
Authority**

February 10, 2022

---

## Roll Call & Introductions

---

**EPAC Members Roll Call:** please say "here"

If on a computer, press UNMUTE

If on phone:

\*6 to unmute



San Francisco  
County Transportation  
Authority

# Agenda Item 2.

## EPAC Chair's Remarks



San Francisco  
County Transportation  
Authority

February 10, 2022



---

## 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



San Francisco  
County Transportation  
Authority

[ this page intentionally left blank ]

# Agenda Item 3.

## Meeting #9 Recap, Minutes and Follow-Ups



San Francisco  
County Transportation  
Authority

February 10, 2022



## What we heard:

- **Desire to split out program components:**
  - Traffic Signals from Safer and Complete Streets
  - Pennsylvania Alignment from Downtown Caltrain Extension and Pennsylvania Alignment
- [Informal EPAC zoom poll results](#) (link to results)



February 10 Discussion of Draft Expenditure Plan

February 24\* Approve Final Complete Expenditure Plan

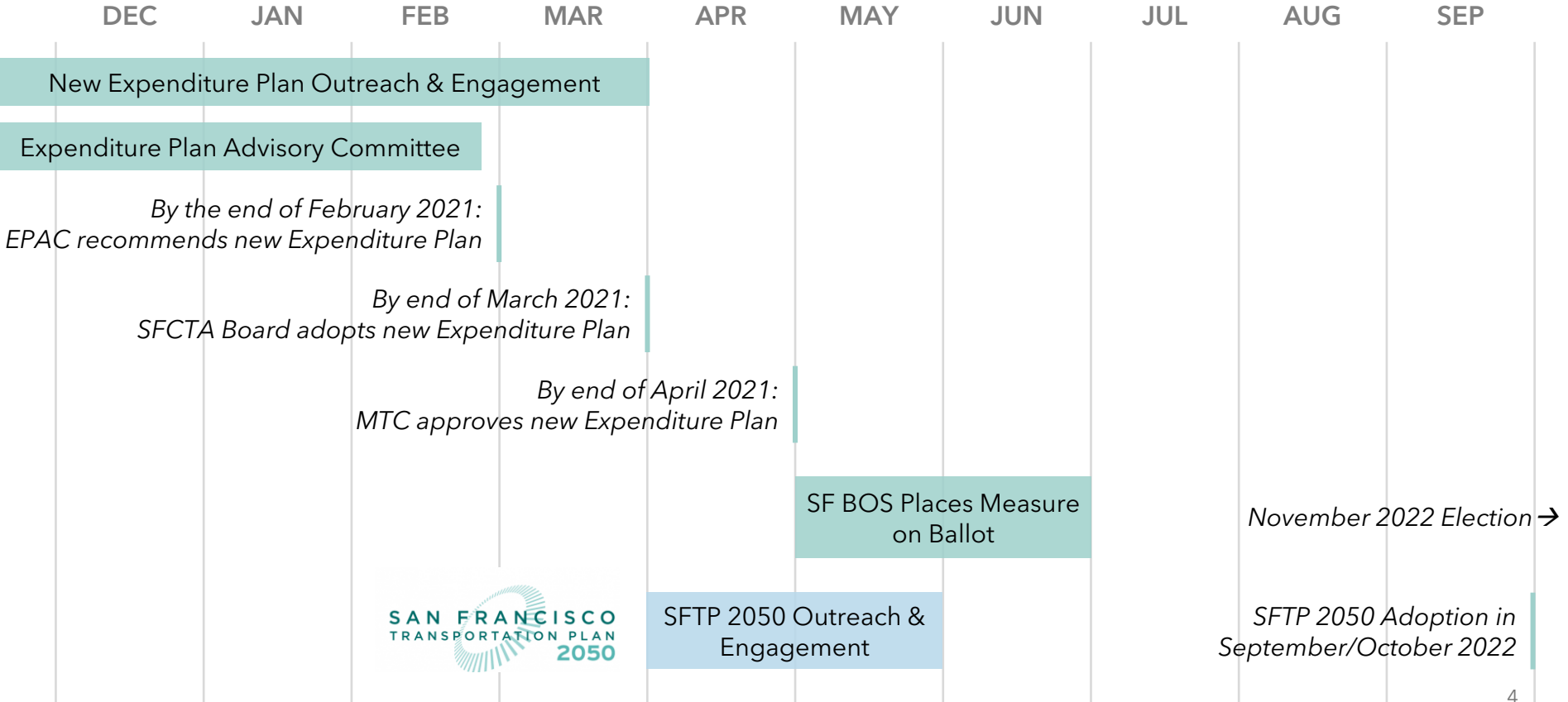
*\*Anticipating EPAC will need the February 24 meeting for final action*

*Following EPAC action, approvals are needed at the Transportation Authority, the Metropolitan Transportation Commission, and the Board of Supervisors to place a sales tax measure on the November 2022 ballot.*

# New Expenditure Plan Schedule



San Francisco  
County Transportation  
Authority



# Questions?



**San Francisco  
County Transportation  
Authority**

## 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



San Francisco  
County Transportation  
Authority





# DRAFT MINUTES

## Expenditure Plan Advisory Committee

Thursday, January 27, 2022

### 1. Call to Order

The meeting was called to order at 6:05 p.m.

**Present at Roll Call:** Members: Jay Bain, Anni Chung, Majeid Crawford, Cathy DeLuca (alternate for Joan Van Rijn), Zack Deutsch-Gross, Mel Flores, Daniel Herzstein (alternate for Rodney Fong), Amandeep Jawa, Sharky Laguana, Aaron Leifer, Jessica Lum, Jodie Medeiros, Calvin Quick, Pi Ra, Eric Rozell, Yensing Sihapanya, Sujata Srivastava, Wesley Tam, Kim Tavaglione, Christopher White (20)

**Absent at Roll Call:** Rosa Chen, Jesse Fernandez (arrived after roll), Rodney Fong, Maryo Mogannam, Maelig Morvan, Susan Murphy, Maurice Rivers (arrived after roll), Earl Shaddix, Joan Van Rijn (9)

### 2. EPAC Chair's Remarks - INFORMATION

Chair Jawa thanked members for joining to continue the discussion and staff for being flexible and supportive, with a special thank you to EPAC members for staying involved in the long process that has a lot of information. He said that tonight was the beginning of the end of the process and he thinks the EPAC will get to a point they are proud of. He restated that the EPAC's assignment was to recommend a draft expenditure plan that would be a continuation of the half-cent sales tax for transportation. He said the expenditure plan was a way to focus future investment. The chair acknowledged big topics discussed at the prior meeting like gentrification and displacement and said the Expenditure Plan is an important tool focused on future transportation investments, but it would not be able to solve all the challenges facing the city and its communities. He noted that the sales tax is an important component that would help leverage other funding sources, which is necessary because no one funding tool would be able to close all the gaps. He said that staff would do a guided review, line by line, of the proposed program and project staff were available to answer questions. He also spoke with staff about incorporating polling to see where there was consensus, intended to be a strawman poll to get clarity on where people stand. He added that there was a time constraint tonight and given the ballot schedule, with only one or two more EPAC meetings remaining. He noted that since this was a dedicated tax requiring 2/3 voter approval, the expenditure plan needed to represent the city in a compelling way. He said the existing expenditure plan was running out of money in some categories and if there was not consensus on a new expenditure plan, some programs would lose funding and agencies would need to look elsewhere.

During public comment, Gloria Berry said they heard the chair that not all problems could be solved by the expenditure plan but they had been told that in the African American community for years and there was a need to recognize how plans have harmed or displaced the community. They said there was a meeting on Monday that developed suggestions and they saw harm in the freeway budget, for example,



because women often commute by car because transit was not adequate. They said safety on public transit was a deterrent and they would like more recruitment of the Black community at all levels, including management, from transportation departments. They also said there was a need for improved cleanliness on transit and access to public parks. They said the 25 bus on Treasure Island was also an issue in terms of reliability.

### **3. Meeting #8 Recap, Minutes and Follow-Ups - INFORMATION\***

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

There were no EPAC questions.

There was no public comment.

### **4. Engagement and Outreach Update - INFORMATION**

Kaley Lyons, Senior Transportation Planner, presented the item.

There were no EPAC questions.

During public comment, Muriel Nash said their biggest concern was that San Francisco had a lot of gentrification and people had left the city over the past 10 to 15 years and nobody was reflecting on that. They asked where the city was on this because people left due to public transportation and being unable to get around. They asked if this had been looked into and how to stop it from happening for the next 30 years.

### **5. Draft Expenditure Plan Discussion - INFORMATION\***

Michelle Beaulieu, Principal Transportation Planner - Government Affairs and Maria Lombardo, Chief Deputy Director, presented the item.

A member said they saw a lot of community support and community engagement presented in the policies and prioritization and asked if there were precise standards for these.

Maria Lombardo said that when a project sponsor requests funding, they describe the community engagement process and whether the project came from a community-based transportation plan as well as the types of community support. She gave an example of how letters from citywide organizations supporting a project were great but projects with a combination of citywide organizations and neighborhood support would receive higher priority, indicating that the diversity and depth of support mattered.

The member said they would like to see a checklist to evaluate community support.

Ms. Lombardo said she could share the definition used in calls for projects as a starting point.

During public comment, Latoya Pitcher said the Prop K prioritization methodology around traffic calming, safety, and community engagement were buzzwords and said that as a member of the Black community, definition was important so the community can see themselves in the plan. They told staff not to be afraid to mention the Black community specifically. They said they spoke at a meeting last week about school safety and with regard to signals and signs, they want to preserve community culture without too much over-policing and without creating more traffic.



Kiani Shaw said they would like to see numbers or details on what it meant to engage the community and hear more about community engagement in different projects.

Gloria Berry said the presentation focused on priorities and it was hurtful to see a white man on a bike in the presentation slides because a lot of people that were harmed by past investments saw new projects like this benefit only certain folks and contributing to gentrification and displacement. They were glad to see a slide with Asian seniors because this community was struggling but there were no Black or Latinx people on the slides to show that they were priorities. They said in the slide showing construction work, there were no Black people except for the person directing traffic, which was typically a low-paying job. They added they were glad to see signage was a priority because signs developed in the past 10 years were confusing and led to collisions, with an example being 10<sup>th</sup> Street where the traffic lane crosses the bike lane.

**[Minutes below are from the line by line review and discussion of the draft expenditure plan programs.]**

**[Citywide and Neighborhood Planning]**

A member asked for clarification as to whether some of proposed programs could be funded from other sources such as the One Bay Area Grant program (OBAG).

Ms. Lombardo answered affirmatively saying that, for example, MTC provided some funding for community-based planning and there were also Caltrans planning grants, but said the amount was inadequate to fund the needed planning efforts.

A member requested clarification as to whether the equity program included capital projects as well as planning activities.

Ms. Beaulieu affirmed that it did, with the idea that planning should set up a pipeline of projects.

**[Transformative Streets and Freeways]**

A member asked how effective managed lanes on freeways were at reducing transit times.

Ms. Beaulieu responded that transit reliability improvements were a key goal and that planning efforts were underway working to quantify transit time savings for the latest configurations under study.

Tilly Chang, Executive Director, said previous studies established benefits to automobile and transit users, adding that such projects could address transportation equity because people such as residents of the Bayview would benefit. She referenced reports on the [Freeway Corridor Management Study webpage](#) which had some data that address the benefits questions.

**[Safe and Complete Streets]**

A member commented that Safer and Complete Streets felt like a grab bag of programs and suggested the EPAC consider breaking it up into smaller, more specific categories.

Chair Jawa said such a discussion would be valuable at another time, with the understanding that the EPAC could define categories but couldn't pick specific projects.



A member supported breaking up the category into smaller, more specific groupings. They pointed out that there were several categories, including traffic signals and curb ramps, with greater funding and much narrower ranges of projects.

Ms. Lombardo said funding sources for certain categories such as tree planting and curb ramps fund a very narrow set of project types that have few other fund sources, and dedicated sales tax funds provide funding stability for these ongoing programs.

A member asked if there was information on the Mission Bay Ferry Landing's ability to attract other funds and said they were interested in knowing more about the equity component in that project.

Seamus Murphy, Executive Director at Water Emergency Transportation Authority (WETA), responded that there were other funding sources for the project, including \$25 million in Regional Measure 3 bridge toll funds that were locked in a legal limbo. He said there were other local and state funds available through competitive grant programs, but such funding was not guaranteed. He said Senator Pelosi had tried to include an earmark for the project in the federal infrastructure bill but hadn't succeeded. Regarding equity and environmental benefits, Mr. Murphy said the project would serve Mission Bay and full funding would open another funding opportunity to implement WETA's first electric ferry service. He pointed out that the project would connect equity priority neighborhoods to jobs and provide new transportation infrastructure for communities without good access to surface transportation such as Treasure Island.

Chair Jawa asked if staff was present who could help the EPAC understand the level of community support for a new Bayview Caltrain station and pointed out that the project would replace a station that had been closed in the past.

Executive Director Chang responded, noting the Planning Department was leading the station study, saying there had been substantial interest expressed by the public and letters of support from San Francisco State University, the Bayview Citizens Advisory Committee, and others.

A member said it was difficult to understand what was meant by "programs" and "buckets" because there wasn't enough information to understand where money was coming from and going toward. They questioned the level of funding for Caltrain given that BART provided a more equitable service and benefitted people who had been economically displaced from San Francisco.

Ms. Lombardo responded that it was tricky to look at sales tax funding levels without considering the other fund sources available for particular projects. She said Caltrain operations were supported by a 1/8 cent sales tax (Caltrain's Measure RR) in the three Caltrain member counties (San Francisco, San Mateo, and Santa Clara) which is about \$25 million annually from San Francisco, and that this is the only local dedicated fund source for Caltrain and right now covers operations entirely. In comparison, she noted that BART had dedicated revenues from permanent sales and property taxes in the BART district (Alameda, Contra Costa and San Francisco counties), and was getting about \$100 million annually from San Francisco - in addition to revenues from BART's \$3.5 billion Measure RR bond approved several years ago. She said the \$100 million for Caltrain proposed in the draft expenditure plan was meant to cover about \$5 million a year toward San Francisco's annual Caltrain contribution to capital maintenance, a cost that SFMTA would otherwise have to cover as the member agency. She closed by noting that all the transit operators have more needs that exceed



available funding and that additional revenue measures would be needed, but the above context provided the rationale for the level of Caltrain maintenance funds recommended in the expenditure plan.

Peter Skinner, Caltrain, said Caltrain had relied on Prop K sales and contributions from the Peninsula Corridor Joint Powers Board or Caltrain member counties to support its state of good repair program and would continue to rely on San Francisco for funding. He said external funding allowed Caltrain to leverage state and federal funds so that Measure RR funds could be focused on operations and equity programs. He said one of the explicit intentions of Measure RR was to improve the equitability of Caltrain service through reduced fares and more frequent trains to allow it to serve a more diverse ridership.

Pamela Herhold, BART, said that BART's sales and property taxes were for operations, whereas San Francisco sales tax funds would be used for capital infrastructure that would benefit the City, such as a new transbay crossing. She said San Francisco sales tax funds would specifically support projects in the City such as elevators - new and replaced at the downtown station, fare gates and escalators.

Priya Mathur, BART, said 75% of current BART passengers identified as non-white, 50% were low income, and many were transit dependent. She said BART was asking for an increase in the share of San Francisco sales tax funding from the relatively low level of \$70-80 million to \$240 million to fund infrastructure that would benefit the City in the near term such as elevators, fare gates and increased core capacity which would increase the level service to San Francisco by 30-40%.

Anthony Simmons, Caltrain, said the equity of Caltrain's service had improved already, with an increase in the number of trains to 104 per day, the most ever. He said Caltrain's ridership was changing to be less focused on high-salary riders and more useful to people who needed service outside of peak periods.

A member asked if SFMTA would have to make up the difference if San Francisco sales tax funding for Caltrain state of good repair was reduced.

Ms. Lombardo answered affirmatively explaining that the sales tax funds offset the City's capital contribution to Caltrain capital maintenance. She said Measure RR had relieved SFMTA of its responsibility for an operations contribution.

Jonathan Rewers, SFMTA, said that Muni had the largest ridership of any transit system in the region and was carrying over half the transit dependent riders in the region. He said that Caltrain's capital needs were funded through a three-county agreement and that San Francisco's share was funded by its sales tax [since 2003] and any reduction in that source would have to be backfilled from SFMTA's operating budget.

A member pointed out that the \$100 million in sales tax funds proposed for Caltrain was expected to be exhausted after the first 20 years of the 30-year plan, when responsibility would revert back to SFMTA.

A member asked how a reduction in sales tax funding would impact the Caltrain Downtown Rail Extension (DTX).

A Transbay Joint Powers Authority staff member replied that it was a critical time for DTX funding because very recently the project had entered the federal grant program [Capital Investment Grant - New Starts] which could provide half of the project's funding. That grant program had been doubled in size for the current cycle, providing a rare opportunity to close the funding gap, but required a \$900 million local



commitment by February 2023. He said San Francisco's sales tax was a key component of the strategy to fund the local commitment.

A member commented that the EPAC's approach of evaluating the expenditure plan line-by-line or agency-by-agency was unfortunate because all transit in the Bay Area was really part of a single regional transit system.

Another member agreed that a regional perspective was important, especially when considering disadvantaged communities and opportunities for job creation during construction. They pointed out that local leverage had been critical in funding past projects such as the Aquatic Pier.

A member noted that DTX supported High Speed Rail and asked if it should be split from Pennsylvania Avenue Alignment, which was focused on planning, or if the Pennsylvania Avenue component could move to priority 2.

Ms. Beaulieu said the projects had been grouped together to support coordinated planning, but EPAC could consider breaking the category apart.

A member expressed concern that cutting sales tax funds for DTX would cost the region a far larger amount in federal funds. They said trying to fund the project with just local funds was probably not feasible.

A member expressed concern about the potential loss of federal funds if sales tax funding was cut for Caltrain, and suggested this might be a consideration for other categories as well.

Ms. Lombardo said EPAC could recommend either splitting the Pennsylvania Alignment out of the DTX category or reduce its funding. She added that the Pennsylvania Alignment would also eligible for the Next Generation Transit category as it is in the very early project development stages.

A member stated that it was important to consider the economic importance of regional transit projects to small businesses and the downtown economy, and there was an urgent need to bring visitors and workers back downtown.

Members used the zoom polling feature to informally indicate if they would like to increase, decrease, or maintain the current draft level of funding for each program. The [results of the zoom poll](#) are posted on the agency's website with the January 27 meeting materials.

A member asked if they would be able to see the poll results.

Ms. Beaulieu said poll results would be posted the following day since it was logistically hard to show them on the spot given the hour.

During public comment, Roland Lebrun said he was glad to see the Pennsylvania Avenue Alignment program combined with the DTX because combining them would save \$2 billion. He said regarding equity with Caltrain, DTX and the Pennsylvania Alignment would allow 12 trains per hour and Link21 [second transbay rail crossing] would be a game changer with additional capacity for trains coming across from the east bay plus Capital Corridor all the way down to Brisbane.

Gloria Berry said they would like to look more closely at the equity priority plan and they are concerned about funding congestion [express] lanes because it would help people working in the technology sector primarily, leaving low-income people stuck in traffic. They said they want this referred to the San Francisco Reparations Committee



so that Black people do not pay to be in the lanes. They said they were also concerned about Alemany being used for freeways, displacement with eminent domain, and affordable housing.

Latoya said they appreciate the presentation and see many job creation opportunities and asked to be intentional for Black management in these jobs and a pathway for promotion and learning.

John Doherty, IBW Local 6, said they were in support of not less than \$300 million for the DTX and the greenhouse-gas-free transit it would provide.

Charley Lavery, Operating Engineers Local 3, said they represent 38,000 skilled men and women, including 600 people who work on DTX. They asked the EPAC to make no cuts to DTX funding, and said it provided good union jobs, helped take cars off roads, planes out of the air, and would have a global impact with high speed rail into San Francisco. They said this \$329 million would leverage \$3.3 billion down the road and the federal government needs to see San Francisco fully committed to the project with local funds.

Dan Torres, San Francisco Local 483 business representative urged the EPAC to support funding for DTX at \$300 million, if not more. They said they represent over 1,250 sprinkler fitters in the Bay Area.

Greg Hardeman, elevator union and San Francisco resident, said they would like to support funding for the transit plan because elevators create green energy and help to create jobs that were lost during the COVID-19 pandemic.

Gerald Cauthen said the Caltrain Downtown extension in the city would help to ease traffic in San Francisco which would also help Muni reliability which is slowed down by traffic.

Cheryl Thornton, District 10 resident, said they were in favor of Caltrain but would like the station at Gilman and 3<sup>rd</sup> Street. They said too many times Black people had been left behind and they were 13% of San Francisco's population and were now 5%. They said in addition to Caltrain in District 10, there were job creation, UCSF Mission Bay, and 3<sup>rd</sup> Street benefits as well. They said regarding paratransit, there was a 12-to-15-year health disparity in the city and people were using paratransit to come to the health department and it was not very timely or reliable so that should be looked into.

Muriel Nash said they appreciated the local unions being on board with Caltrain [Downtown Extension] and said their biggest concern was security on transit. They said they work in Santa Clara County and would like to know how much funding they were putting in for BART to Santa Clara. They said it was a shared opportunity between San Francisco and Santa Clara and funds could be used elsewhere if Santa Clara contributed more funding.

Pedro Mendez, Carpenters Local 22, urged the EPAC to support funding for DTX to meet key milestones for the project.

## **6. Public Comment**

There was no public comment.

## **7. Adjournment**

The meeting was adjourned at 8:20 p.m.

[ this page intentionally left blank ]



San Francisco  
County Transportation  
Authority



# Agenda Item 4.

## Draft Expenditure Plan Discussion



San Francisco  
County Transportation  
Authority

February 10, 2022



## For Discussion Today:

- Program refinement recommendations
  - With no net funding level changes; sponsor requested
- Funding level recommendations
  - Reducing total funding to match revised revenue forecast: need to reduce \$32 M (million) in Priority 1 \$
  - Funding revisions based on EPAC and other input (looking at Priority 1 and Priority 2 funding)

# Program Refinement Recommendations: No Net Funding Changes (slide 1 of 3)



San Francisco  
County Transportation  
Authority

27

- **Muni Maintenance: Vehicles, Facilities and Guideways**
  - Combine 3 programs into 1: Muni Maintenance
  - SFMTA's request; parallels BART & Caltrain maintenance programs
- **BART Maintenance and BART Station Access, Safety and Capacity**
  - Combine 2 programs into 1: BART Maintenance
  - BART's request

## Program Refinement Recommendations: No Funding Changes (slide 2 of 3)



- **Safer and Complete Streets**
  - Split out **Traffic Signs & Signals Maintenance**-\$90 M (leaves \$136.9 M in Safer and Complete Streets)
  - SFMTA's request, this amount/request was noted in initial program description
  - Have heard some EPAC support for this change, recognizing signal safety benefits

## Program Refinement Recommendations: No Funding Changes (slide 3 of 3)



San Francisco  
County Transportation  
Authority

29

- If EPAC supports these changes, staff will update program descriptions and Expenditure Plan (EP) summary table to match
- Any major concerns from EPAC members?



## Informal EPAC Zoom Poll, January 27, 2022

- Informal poll of the group; not a binding vote
- Results used to help staff craft Expenditure Plan scenarios for the group to consider



How we used the poll results:

- *Majority of votes were for “Stay the Same”*
- *Looked at programs that got the most votes for MORE or DECREASED funding to focus discussion of potential changes*

## 32 Draft EP: January 27 EPAC Zoom Poll



San Francisco  
County Transportation  
Authority

(Based on the [Draft Expenditure Plan Summary Table](#) Revised 10/4/2021), we asked:

**For each program, would you like to see:**

- A. MORE funding than proposed in the initial draft expenditure plan.
- B. The SAME level of funding as proposed.
- C. Funding DECREASED if necessary to fund other priorities.
- D. Unsure





- Between 20 and 22 EPAC members voted on each question (out of a total of 27 members)
- 10 Programs received 12 or more (a majority) of votes to Stay the Same as in the Preliminary Draft Expenditure Plan
- There were relatively few Unsure votes
  - Tree Planting: 4 Unsure votes
  - Ferry Maintenance: 3 Unsure votes
  - 16 programs received 1 or 2 Unsure votes

# 34 Draft EP: January 27 EPAC Zoom Poll



San Francisco  
County Transportation  
Authority

10 Programs received 12 or more (a majority) of votes to **Keep the Same Level of Funding** as in the Preliminary Draft Expenditure Plan.

- Muni Reliability and Efficiency Improvements (15)
- Caltrain Maintenance (15)
- Ferry Maintenance (15)
- BART Station Access, Safety and Capacity (14)
- Vision Zero Ramps (14)
- Paratransit (13)
- Street Resurfacing, Rehabilitation and Maintenance (13)
- Transformative Freeway & Major Street Projects (13)
- Bayview Caltrain Station (12)
- Transit Enhancements (12)



8 Programs received 7 or more votes for **More Funding** than in the Preliminary Draft Expenditure Plan.

- Safer and Complete Streets (10)
- Equity Priority Transportation Program (9)
- BART Core Capacity (8)
- Curb Ramps (8)
- BART Maintenance (7)
- Paratransit (7)\*
- Pedestrian and Bicycle Facilities Maintenance (7)
- Neighborhood Transportation Program (7)

*\*also received a majority of votes to keep the same level of funding*

# 36 Draft EP: January 27 EPAC Zoom Poll



San Francisco  
County Transportation  
Authority

## 11 Programs received 7 or more votes to **Decrease Funding if Needed for Other Priorities** compared to the Preliminary Draft Expenditure Plan

- Caltrain Downtown Rail Extension and Pennsylvania Alignment (14)
- Caltrain Service Vision: Capital System Capacity Investments (11)
- Tree Planting (11)
- Mission Bay Ferry Landing (10)
- Next Generation Transit Investments (9)
- Development Oriented Transportation Program (9)
- Bayview Caltrain Station (8)\*
- Transportation Demand Management (8)
- Muni Rail Core Capacity (7)
- Street Resurfacing, Rehabilitation and Maintenance (7)\*
- Managed Lanes and Express Bus (7)

*\*also received a majority of votes to keep the same level of funding*



- **Reduce total Priority 1 funding by \$32.1 M to match revised revenue forecast of \$2.4 B**
- Staff recommendation on next slide is based on:
  - EPAC member feedback from Zoom poll & ongoing
  - Community Engagement
  - Agency consultation



Staff proposal to reduce total Priority 1 funding by \$32.1 M:

- **-\$13.5 million** from Pennsylvania Alignment
  - *Eligible for Next Generation Transit Investments; Downtown Caltrain Extension (DTX) program description would be revised to focus on DTX*
- **-\$10 million** from Caltrain Service Vision: Capital
  - *Eligible for Next Generation Transit Investments; eliminates Caltrain Service Vision program*
- **-\$7 million** from Muni Core Capacity
  - *\$50 million remains for the program; no SFMTA major objection*
- **-\$1.6 million** from Development Oriented Transportation
  - *\$39 million remains for the program; multi-sponsor program*

EPAC can consider Priority 2 funding for above programs



EPAC discussion on proposed reduction of \$32 M to match the Priority 1 revenue forecast?

- Are there other proposals?
- Any major objections?
- Do we have consensus on a proposal?



Staff will present at the meeting 1 to 2 revised scenarios for Priority 1 and 2 funding taking into consideration:

- *EPAC member poll*
- *Other EPAC feedback*
- *Community engagement*
- *Staff and agency input*



# Questions?



**San Francisco  
County Transportation  
Authority**

## 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



San Francisco  
County Transportation  
Authority

## DRAFT New Expenditure Plan Text Excluding Summary Table and Description of Programs

### 1. Introduction

**A. Summary.** The New Expenditure Plan identifies transportation improvements to be funded from the extension of the existing half-cent transportation sales tax. The programs included in the Expenditure Plan are designed to be implemented over the next 30 years. The New Expenditure Plan includes investments in five major categories: Major Transit Projects, Transit Maintenance & Enhancements, Paratransit, Streets & Freeways, and Transportation System Development & Management.

**B. Context.** The New Expenditure Plan for the use of Prop **TBD** funds was developed by the Expenditure Plan Advisory Committee (EPAC), established by the San Francisco County Transportation Authority (Transportation Authority) Board, with technical assistance provided by the Transportation Authority and other transportation agencies. The roster of EPAC members is provided in Attachment 1. The Expenditure Plan was recommended by the Transportation Authority Board on [date].

Guided by the EPAC, equity has been at the forefront of the process to develop the New Expenditure Plan, the investments included within, as well as how it will be administered.

Half of the EPAC is comprised of representatives from Equity Priority Communities (EPCs), including organizations that serve EPCs. The process to develop the New Expenditure Plan included robust outreach and engagement in multiple languages, with a focus on reaching EPCs and populations that do not typically engage in transportation planning.

Investments are designed to fill gaps identified in an equity analysis conducted at the beginning of the process and include improvements to travel time and accessibility, traffic safety, and public health, as well as addressing transportation costs and supporting community-based planning, including a focus on EPCs.

Administration of the New Expenditure Plan will include a transparent and accountable process, and equity requirements have been built into administration. More details on administration are included in Section 5. Implementation Provisions.

By providing the required local match, Prop **TBD** is intended to leverage about \$**X** billion in federal, state, regional and other local funding for transportation projects in San Francisco.

The New Expenditure Plan is a list of transportation programs describing the types of transportation investments that will be given priority for Prop **TBD** funding. As such the New Expenditure Plan shall be amended into the Capital Improvement Program of the Congestion Management Program, developed pursuant to section 65089 of the California Government Code. These programs are intended to help implement the long-range vision for the development and improvement of San Francisco's transportation system, as articulated in the San Francisco Transportation Plan (SFTP) 2050.

The SFTP is the City's blueprint to guide the development of transportation funding priorities and policy. The SFTP is a living document, updated on a quadrennial basis to identify and address changing needs and regional trends and align them with available funding.

- C. Goals.** The purpose of the New Expenditure Plan is to implement the priorities of the SFTP 2050 through investment in projects and programs that include planning, maintenance and rehabilitation of, and improvements to the city's multi-modal transportation system. The SFTP 2050 is part of the ConnectSF initiative, a multi-agency collaborative process to build an effective, equitable and sustainable transportation system for San Francisco's future. The goals of ConnectSF and of the SFTP 2050 are:
- **Equity.** San Francisco is an inclusive, diverse, and equitable city that offers high-quality, affordable access to desired goods, services, activities, and destinations.
  - **Economic Vitality.** To support a thriving economy, people and businesses easily access key destinations for jobs and commerce in established and growing neighborhoods both within San Francisco and the region.
  - **Environmental Sustainability.** The transportation and land use system support a healthy, resilient environment and sustainable choices for future generations.
  - **Safety and Livability.** People have attractive and safe travel options that improve public health, support livable neighborhoods, and address the needs of all users.
  - **Accountability and Engagement.** San Francisco agencies, the broader community, and elected officials work together to understand the City's transportation needs and deliver projects, programs, and services in a clear, concise, and timely fashion.
- D. Structure.** The New Expenditure Plan is organized into five sections.

Section 1: Introduction provides background on the Plan's goals and development. Section 2: General Provisions provides further context on the Plan's policies and administration. Section 3: Expenditure Plan Summary Table summarizes the Plan's investment detail (e.g. recommended funding distribution) by category, sub-category and program. Section 4: Description of Programs contains descriptions of the programs (organized by category and subcategory), and the types of projects that are eligible for funding under each of them. Section 5: Implementation Provisions describes the process for prioritizing and allocating funds following adoption of the Plan.

## 2. General Provisions

- A. Sales Tax Revenues.** The New Expenditure Plan shall supersede the Proposition K Expenditure Plan, adopted in 2003, as of the operative date of the Ordinance, pursuant to Section 131105 of the California Public Utilities Code. The existing one-half percent local sales tax dedicated to transportation improvements (approved in November 2003 as Proposition K) shall be continued for the duration of the New Expenditure Plan.

Revenues are estimated under **three** scenarios over the 30-year period of the New Expenditure Plan. The conservative projection puts the total revenue level at \$**X** billion (2020 dollars). This scenario reflects an average growth rate of **X%**, and an inflation-based discount rate of **X%**. **[PENDING: MORE DETAIL FOR PRIORITY 1, 2, AND IF THE EPAC ADDS IT, PRIORITY 3 LEVEL REVENUE FORECAST].**

**B. Restriction of Funds.** Sales tax revenues shall be spent on capital projects rather than to fund operations and maintenance of existing transportation services, unless otherwise explicitly specified in the Section 4. Description of Programs. In accordance with enabling legislation and adopted principles, sales tax revenues generated pursuant to this plan shall be subject to the following restrictions:

**i. No Substitution.**

- a. Sales tax revenues shall be used to supplement and under no circumstance replace existing local revenues used for transportation purposes.
- b. Proceeds from the sale or liquidation of capital assets funded with sales tax revenues shall be returned to the Transportation Authority (in proportion to the contribution of sales tax revenues to the total original cost of the asset), for re-allocation to eligible expenses within the program from which funds were expended for the original investment.

**ii. No Expenditures Outside San Francisco.** Unless otherwise explicitly specified in Section 4. Description of Programs, no sales tax funds shall be spent outside the limits of the City and County of San Francisco except for cases that satisfy all of the following conditions:

- a. **Quantifiable Benefit.** The proposed project is eligible to be funded with the sales tax consistent with the Expenditure Plan, and planning or other studies, developed in order to enable its implementation, demonstrate that there will be a quantifiable benefit to the City and County's transportation program from the expenditure of funds beyond the City and County line. A quantifiable benefit is defined as a measurable increase in the cost effectiveness of a project or group of transportation projects and or services at least partially funded with sales tax funds, located along the corridor or in the immediate geographic area of the City and County where the project in question is proposed to occur.
- b. **Expenses Matched by Other Counties.** The proposed expense is matched by funding from the county where the expenditure of sales tax funds is proposed to be made.

Should transportation projects or services contemplated in the plan require the participation of multiple counties for any phase of project planning or implementation, the Transportation Authority shall work cooperatively with the affected county or counties to ensure successful project implementation.

**iii. Funding Caps for Legacy Projects.** Projects carried forward from the Prop K Expenditure Plan as legacy projects shall be eligible to receive Priority 1 funds

from the designated programs, not to exceed the unallocated amounts programmed in the 2021 Prop K Strategic Plan.

- C. **Successor Program.** The New Expenditure Plan shall supersede the Proposition K Expenditure Plan, adopted in 2003, as of the operative date of the Ordinance, pursuant to Section 131105 of the California Public Utilities Code. As such it will bear responsibility for any outstanding debt incurred by the Proposition K program, and for reimbursement of eligible costs for outstanding balances on Proposition K grants. All assets of the Proposition K program shall become Prop TBD program assets.
  - D. **Bonding Authority.** The Transportation Authority shall be authorized to issue, from time to time, limited tax bonds in a total outstanding aggregate amount not to exceed [TO UPDATE \$1.88 billion], payable from the sales tax revenues generated pursuant to this plan. The Transportation Authority's bonding capacity shall be separate and distinct from that of the City and County of San Francisco.
  - E. **Administration by the San Francisco County Transportation Authority.** The San Francisco County Transportation Authority, which currently allocates, administers, and oversees the expenditure of the existing Prop K sales tax for transportation, shall allocate, administer and oversee the expenditure of the Prop TBD sales tax funds.
  - F. **Support of Adjacent Counties.** It is deemed unnecessary to seek the support of adjacent counties by requesting them to develop their own Transportation Expenditure Plans because San Mateo, Alameda, Contra Costa, Marin and San Mateo Counties have already adopted Transportation Expenditure Plans.
  - G. **Environmental Review.** Environmental reporting, review and approval procedures as provided for under the National Environmental Policy Act (NEPA), and/or the California Environmental Quality Act (CEQA), and other applicable laws shall be carried out as a prerequisite to the implementation of any project to be funded partially or entirely with sales tax funds. No definite commitment to any activity or project is made by the adoption of the Expenditure Plan. The Expenditure Plan establishes a funding mechanism for transportation improvements which does not involve any commitment to any specific project which may result in a potentially significant physical impact on the environment. The Expenditure Plan also does not limit the discretion of agencies proposing to carry out eligible projects to select a no action or a no project alternative.
3. **Expenditure Plan Summary Table.** Table 1 below summarizes the half-cent sales tax revenue proposed allocations by category, subcategory, and program in constant 2020 dollars. The New Expenditure Plan is fiscally constrained to the total funding expected to be available for each category (e.g., percent of revenues designated for each category) and by the funding caps established for each program. The financial constraint is further detailed within each program through the specification of funding priority levels (Priorities 1, 2 and [TBD 3]) (See Section 4 Description of Programs).

There are five categories, identified with capital letters (A through E [FORMATTED TABLE PENDING]). The first subdivision level under each category is known as a subcategory. Subcategories are indicated with lower case Roman numerals. The level below a subcategory is known as a program. This Expenditure Plan identifies eligible expenditures through a set of programs that guides the types of transportation projects that will be funded by the sales tax. The programs are set up to address allocation of funds to multi-year programs for a given

purpose, such as street resurfacing or street safety improvements, for which not all specific project locations or improvements can be anticipated or identified at the time of adoption of the Expenditure Plan. This provides certainty about the types of investments that will be made balanced with the flexibility needed for a 30-year plan.

Adoption of an ordinance to continue the existing half-cent sales tax is necessary in order to fund the programs listed in Table 1. The tax shall be continued for the period of implementation of the New Expenditure Plan

**TABLE 1. New Expenditure Plan Summary Table**

[TO BE INSERTED. FOR NOW SEE AGENDA ITEM 5, ATTACHMENT 2 - DRAFT EXPENDITURE PLAN SUMMARY TABLE]

4. **Description of Programs.** This section contains descriptions of the categories, subcategories, and programs in the New Expenditure Plan and the types of projects that are eligible for funding under each of them. It also identifies the sponsoring agency or agencies for each program. The Total Funding figures correspond to the Total Expected Funding column in the Expenditure Plan Summary Table provided in Section 3, above. The percentage allocation of sales tax funds to each of the major categories is as follows: Major Transit Projects - XX.X%, Transit Maintenance & Enhancements XX.X%, Paratransit - X.X%, Streets and Freeways - X.X%, and Transportation System Development & Management - X.X%.

[TO BE INSERTED. FOR NOW SEE AGENDA ITEM 5, ATTACHMENT 3 - DRAFT DESCRIPTION OF PROGRAMS]

5. **Implementation Provisions.**
  - A. **Strategic Plan.** Subsequent to voter approval of the Expenditure Plan, the Transportation Authority shall prepare a 30-year Strategic Plan that will serve as the primary financial tool for administering the sales tax. It shall include policies to guide day-to-day program administration consistent with the Expenditure Plan; updated sales tax revenue projections; proposed sales tax expenditures by category, sub-category and program; and any associated financing needed to ensure funds are available to reimburse eligible expenditures. The Strategic Plan shall be prepared in concert with development of 5-Year Prioritization Programs (see Section 5.B.). The Transportation Authority Board shall adopt the Strategic Plan and updates thereof at least every 5 years.
  - B. **Prioritization Process.** Prior to allocation of sales tax funds from any program, the Transportation Authority shall prepare, in close consultation with all other affected planning and implementation agencies, a 5-year prioritized program of projects or 5YPP including budget, scope and schedule consistent with the Strategic Plan, for review and adoption by the Transportation Authority Board. For programs with only one eligible sponsoring agency, the Transportation Authority may designate that agency as the agency that is to prepare the 5YPP. The proposed projects shall be consistent with the San Francisco Transportation Plan and with the City's General Plan.

The 5YPPs shall at a minimum address, the following factors:

1. Project readiness, including schedule for completion of environmental and design phases; well-documented preliminary cost estimates; documented community support as appropriate.
2. Funding plan, including sources other than the sales tax.
3. Compatibility with existing and planned land uses, and with adopted standards for urban design and for the provision of pedestrian amenities; and supportiveness of planned growth in transit-friendly housing, employment and services.
4. How the project would advance equity or seek to mitigate any impacts on equity.
5. Project benefits including but not limited to how the project advances the goals of San Francisco Transportation Plan.
6. A prioritization mechanism to rank projects within the 5YPP, that includes at a minimum, the following required criteria:
  - a. Relative level of need or urgency
  - b. Cost-effectiveness
  - c. A fair geographic distribution that takes into account the various needs of San Francisco's neighborhoods.
  - d. Level and diversity of community support. Projects with clear and diverse community support and/or identified through a community-based planning process will be prioritized. An example of a community-based plan is a neighborhood transportation plan, but not a countywide plan or agency capital improvement program.
  - e. Benefit to disadvantaged populations, whether the project is directly located in an Equity Priority Community or can demonstrate benefits to disadvantaged populations.

The Transportation Authority and any appropriate designated agencies shall conduct the required public outreach and engagement to ensure an inclusive planning process for the development of the 5YPPs, as well as General Plan referral or referral to any City Department or Commission as required. The Transportation Authority working with eligible sponsoring agencies shall also identify appropriate performance measures, such as increased system connectivity, increased transit ridership (net new riders), reductions in travel time for existing riders, and increased use of alternatives to the single-occupant automobile, along with a timeline for assessing the performance measures to inform the next 5YPP updates, which shall be at least every 5 years concurrent with Strategic Plan updates. These performance measures shall be consistent with Congestion Management Program requirements and guidelines issued by the Transportation Authority.

Designated agencies shall be eligible for planning funds from the relevant Expenditure Plan programs for the purpose of completing the development of the 5YPP. Sponsoring agencies will be encouraged to explore alternative and non-traditional methods for project and service delivery where they offer opportunities for increased cost-effectiveness and/or shortened project delivery timelines.



As part of the Strategic Plan development process, the Transportation Authority shall adopt, issue and update detailed guidelines for the development of 5YPPs.

- C. Project Delivery Oversight.** The Transportation Authority Board shall adopt project delivery oversight guidelines for major capital projects to be funded by the sales tax. The guidelines shall consider the total cost and complexity of a project in setting the definition of a major capital project. Objectives of these guidelines shall include supporting the cost effective and timely delivery of projects funded wholly or in part by the sales tax. Transportation Authority staff shall prepare a report at least annually, to the Transportation Authority Board, to communicate the status of these projects.
- D. Funding Priority Levels.** Each New Expenditure Plan program shall be funded using sales tax revenue up to the total amount for that program in Priority 1. If, after funding all Priority 1 programs in a subcategory, the latest Strategic Plan forecasts available revenues in excess of Priority 1 levels, the Transportation Authority Board may allow programming of Priority 2 revenues within the subcategory, subject to the category percentage caps and program dollar amount caps for Priority 2 established in the New Expenditure Plan. [TBD if EPAC Recommends Priority 3. After funding at least 80% of Priority 2 program dollar amounts, the Transportation Authority Board may program Priority 3 requests, if the latest Strategic Plan forecasts revenues beyond the total Priority 2 level.]
- E. Cost Savings and Remaining Funds.** If the eligible sponsoring agency or agencies complete delivery of an Expenditure Plan program or project or determine that they will no longer pursue implementation of the program or project with sales tax funds, the Transportation Authority Board may use any remaining sales tax funds in that program to fund one or more other Expenditure Plan programs in the same category that would otherwise be in compliance with the prioritization provisions set forth in Sections 5.B. and 5.D. To do so, the Transportation Authority Board must first hold a public hearing on the matter and then not sooner than 30 days after the hearing, the Transportation Authority Board may, by a 2/3 vote, direct all or a portion of the remaining funds to one or more Expenditure Plan programs.

## Attachment 1. Expenditure Plan Advisory Committee Roster

Amandeep Jawa, Chair	Advocacy: Environment
Anni Chung, Vice Chair	Advocacy: Seniors and People with Disabilities
Jay Bain	Neighborhoods/Communities
Rosa Chen	Equity Priority Community/Community Advisory Committee
Majeid Crawford	Equity Priority Community
Zack Deutsch-Gross	Advocacy: Transit
Jessie Fernandez	Advocacy: Equity
Mel Flores	Equity Priority Community
Rodney Fong	Business/Civic: Large Business
Sharky Laguana	Business/Civic: Small Business
Aaron P. Leifer	Neighborhood/Community
Jessica Lum	Business/Civic: Tourism/Visitors
Jodie Medeiros	Advocacy: Walk
Maryo Mogannam	Business/Civic: Small Business
Maelig Morvan	Neighborhood/Community
Susan Murphy	Equity Priority Community
Calvin Quick	Advocacy: Youth
Pi Ra	Advocacy: Seniors and People with Disabilities
Maurice Rivers	Equity Priority Community
Eric Rozell	Equity Priority Community
Earl Shaddix	Equity Priority Community
Yensing Sihapanya	Equity Priority Community
Sujata Srivastava	Business/Civic: Civic
Wesley Tam	Neighborhood/Community
Kim Tavaglione	Business/Civic: Labor
Joan Van Rijn	Neighborhood/Community
Chris White	Advocacy: Bike
Cassandra Costello	Alternate: Business/Civic: Tourism/Visitors
Cathy de Luca	Alternate: Advocacy: Seniors and People with Disabilities
Daniel Herzstein	Alternate: Business/Civic: Large Business
Sasha Hirji	Alternate: Advocacy: Youth
Melvin Parham	Alternate: Equity Priority Community
Maribel Ramirez	Alternate: Equity Priority Community



NEW EP CATEGORY - SUBCATEGORY - PROGRAM	MAXIMUM FUNDING (2020 MILLION\$*)	PERCENT OF TOTAL**
<b>Major Transit Projects</b>	<b>\$556.5</b>	<b>23.3%</b>
Muni Reliability and Efficiency Improvements	\$110.0	4.6%
Muni Rail Core Capacity	\$57.0	2.4%
BART Core Capacity	\$50.0	2.1%
Caltrain Service Vision: Capital System Capacity Investments	\$10.0	0.4%
Caltrain Downtown Rail Extension and Pennsylvania Alignment	\$329.5	13.8%
<b>Transit Maintenance &amp; Enhancements</b>	<b>\$1,049.0</b>	<b>43.9%</b>
<b>Maintenance, Rehabilitation and Replacement</b>	<b>\$936.8</b>	<b>39.2%</b>
Muni — Vehicles	\$453.7	19.0%
Muni — Facilities	\$118.5	5.0%
Muni — Guideways	\$238.8	10.0%
BART	\$21.3	0.9%
Caltrain	\$100.0	4.2%
Ferry	\$4.5	0.2%
<b>Transit Enhancements</b>	<b>\$112.2</b>	<b>4.7%</b>
Transit Enhancements	\$38.2	1.6%
BART Station Access, Safety and Capacity	\$9.3	0.4%
New Bayview Caltrain Station	\$27.7	1.2%
Mission Bay Ferry Landing	\$7.0	0.3%
Next Generation Transit Investments	\$30.0	1.3%
<b>Paratransit</b>	<b>\$205.4</b>	<b>8.6%</b>
<b>Streets and Freeways</b>	<b>\$440.4</b>	<b>18.4%</b>
<b>Maintenance, Rehabilitation and Replacement</b>	<b>\$122.7</b>	<b>5.1%</b>
Street Resurfacing, Rehabilitation and Maintenance	\$105.0	4.4%
Pedestrian and Bicycle Facilities Maintenance	\$17.7	0.7%
<b>Safe and Complete Streets</b>	<b>\$274.7</b>	<b>11.5%</b>
Safer Streets (signals, traffic calming, bikes and peds)	\$226.9	9.5%
Curb Ramps	\$23.9	1.0%
Tree Planting	\$23.9	1.0%
<b>Freeway Safety and Operational Improvements</b>	<b>\$43.0</b>	<b>1.8%</b>
Vision Zero Ramps	\$8.0	0.3%
Managed Lanes and Express Bus	\$15.0	0.6%
Transformative Freeway & Major Street Projects	\$20.0	0.8%
<b>Transportation System Development &amp; Management</b>	<b>\$162.0</b>	<b>6.8%</b>
<b>Transportation Demand Management</b>	<b>\$30.0</b>	<b>1.3%</b>
<b>Transportation, Land Use and Community Coordination</b>	<b>\$132.0</b>	<b>5.5%</b>
Neighborhood Transportation Program	\$40.0	1.7%
Equity Priority Transportation Program	\$40.0	1.7%
Development Oriented Transportation	\$42.0	1.8%
Citywide / Modal Planning	\$10.0	0.4%
<b>Total Draft Expenditure Plan</b>	<b>\$2.413 billion</b>	<b>101.1%</b>
<b>Total Draft Revenue Forecast</b>	<b>\$2.383 billion</b>	

\* All funding amounts are in millions of 2020 dollars.

\*\* EP percentages are based on a percent of the conservative 30-year revenue forecast. We may add additional funding based on a more optimistic forecast.

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



### **Attachment 3 DRAFT New Expenditure Plan Program Descriptions**

The Transportation Authority has developed draft program descriptions for all programs and projects included in the preliminary draft New Expenditure Plan. 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 ConnectSF and the San Francisco Transportation Plan 2050, including funding and program needs from all the transportation agencies serving San Francisco; and
- Proposition K sales tax program descriptions, updated to reflect lessons learned and to address the current needs of the sponsor agencies.

Please note the proposed New Expenditure Plan descriptions reference dollar amounts in 2020 \$s.

## **MAJOR TRANSIT PROJECTS**

### **1. Muni Reliability and Efficiency Improvements**

Programmatic improvements that improve the reliability and speed of Muni bus and rail service. Eligible project types include: transit-only lanes; curb bulb-outs at Muni stops; traffic signal modifications; deployment of transit signal priority devices; relocation and upgrade of Muni stops; and other street design changes (e.g. highly visible crosswalks, median island refuges) to reduce delay for transit and enhance pedestrian safety. Includes \$10M in legacy funding for Geary Rapid Improvements Phase 2. Includes project development and capital costs. Sponsor Agency: SFMTA. Total Funding: TBD; EP: \$110M.

### **2. Muni Rail Core Capacity**

Programmatic improvements that increase the reliability and capacity of Muni's rail system by supporting longer and more frequent trains. High priority shall be given to installation of a next generation communications-based train control system for the Muni surface and subway rail network. Engineering improvements may include lengthening existing platforms to accommodate 3 and 4-car light rail trains in the Muni Metro Tunnel between West Portal and Embarcadero stations, and 3-car trains on the N Judah line. Upgrades to switches, crossovers, and other components to increase subway reliability and throughput, and modifications to subway portals to minimize conflicts. Purchase of additional light rail vehicles to increase the fleet's overall capacity and new/upgraded maintenance and/or storage facilities to house additional vehicles. Includes project development and capital costs. Sponsor Agency: SFMTA. Total Funding: TBD; EP: \$57M.

### **3. BART Core Capacity**

Improvements that will allow BART to operate up to 30 ten-car trains per hour in each direction through the existing Transbay Tube (an increase from the current capacity of 23 trains per hour). Eligible project types include: new (additional) rail cars; a new communications-based train control system; a new rail car storage yard at the Hayward Maintenance Complex; and additional traction



power substations to provide the power needed for more frequent service. Includes project development and capital costs. As a prerequisite to allocation of funds, the Transportation Authority Board shall consider whether Alameda and Contra Costa Counties have contributed a commensurate amount to the BART Core Capacity Program. Sponsor Agency: BART. Total Funding: TBD; EP: \$50M.

#### **4. Caltrain Service Vision: Capital System Capacity Investments**

Capital improvements that will allow Caltrain service up to operate eight trains per direction per hour consistent with the Caltrain Business Plan Service Vision. Eligible project types include but are not limited to additional fleet, level boarding at station platforms, additional train storage, track work and station improvements. Includes planning, project development, and capital costs. Sponsor Agency: PCJPB. Total Funding: TBD; EP: \$10M.

#### **5. Caltrain Downtown Rail Extension and Pennsylvania Alignment**

Caltrain Downtown Rail Extension: The underground extension of the Caltrain commuter rail system from the current Caltrain San Francisco terminus into the Salesforce Transit Center. Project designed to accommodate blended service with future California High-Speed Rail. Includes a new station at 4th and Townsend streets. Project includes \$19.5 million in legacy funding.

Pennsylvania Alignment: Below-grade rail alignment extending south from the planned Downtown Rail Extension. Project will serve the Caltrain commuter rail system and future California High-Speed Rail service. Pennsylvania Alignment will separate rail from surface-level conflicts with street users at 16th Street and Mission Bay Drive. A minimum of \$10 million will be available for the Pennsylvania Alignment.

Includes project development and capital costs. Sponsor Agencies: TJPA, SFCTA. Total Funding: TBD; EP: \$329.5M.

### **TRANSIT MAINTENANCE & ENHANCEMENTS**

#### **Maintenance, Rehabilitation and Replacement Sub-Category**

- 1. Muni - Vehicles.** Programmatic improvements for upgrade, rehabilitation and replacement of transit vehicles, spare parts and on-board equipment. Eligible project types include: rail car, trolley coach and motor coach renovation and replacement of buses with zero emission vehicles. With respect to the latter, additional vehicles may be added to the fleet to maintain current fleet passenger capacity (e.g., if electric buses have lower passenger capacity). Includes project development and capital costs. Sponsor Agency: SFMTA. Total Funding: TBD; EP: \$452.8M.
- 2. Muni - Facilities.** Programmatic improvements for upgrade, rehabilitation and replacement of transit facilities and facilities-related equipment. Eligible project types include: rehabilitation, upgrades and/or replacement of existing facilities for maintenance and operations, including equipment and upgrades to support the electrification of the Muni motor coach fleet and to improve resilience to climate change. Rehabilitation, upgrades and renovation for rail stations including, but not limited to platform edge tiles, elevators, escalators, and faregates. Includes project development and capital costs. Sponsor Agency: SFMTA. Total Funding: TBD; EP: \$118.2M.

3. **Muni - Guideways.** Programmatic improvements for upgrade, rehabilitation and replacement of transit guideways and associated equipment. The intent is to implement transit priority and reliability improvements whenever rehabilitation, upgrade or replacement projects are undertaken. Eligible project types include, but are not limited to rehabilitation, upgrades and/or replacement of existing rail, overhead trolley wires, signals, traction power stations, and automatic train control systems, as well as upgrades to improve resilience to climate change. Includes project development and capital costs. Sponsor Agency: SFMTA. Total Funding: TBD; EP: \$238.3M.
4. **BART.** Programmatic improvements for the upgrade, rehabilitation and replacement of BART's capital assets. Eligible project types include, but are not limited to the upgrade, rehabilitation and replacement of: transit vehicles and on-board equipment; transit stations including platform edge tiles, elevators, escalators, and faregates; transit facilities and facilities related equipment; and guideways such as rail, train control, traction power, and related equipment. Facilities and guideways improvements may include upgrades to improve resilience to climate change. Includes project development and capital costs. Sponsor Agency: BART. Total Funding: TBD; EP: \$21.2M.
5. **Caltrain.** Provides San Francisco's local match contribution for the Caltrain capital program, on behalf of the City and County of San Francisco until sales tax funds run out. Programmatic improvements such as the upgrade, rehabilitation and replacement of transit vehicles, spare parts and on-board equipment; transit facilities (including stations) and facilities related equipment; and guideways such as rail, signals, communications, traction power equipment, and the overhead contact system. Facilities and guideways improvements may include upgrades to improve resilience to climate change. Service planning and capital planning efforts are also eligible. Includes project development and capital costs. Sponsor Agency: PCJPB. Total Funding: TBD; EP: \$100M.
6. **Ferry.** Programmatic improvements for the upgrade, rehabilitation and replacement of landside ferry facilities, passenger-serving facilities, and facilities-related equipment. May also include improvements to San Francisco ferry terminals to accommodate increases in ferry ridership, electrification and to improve resilience to climate change. Includes project development and capital costs. Sponsor Agencies: Port of SF, GGBHTD. Total Funding: TBD; EP: \$4.5M.

### **Transit Enhancements Sub-Category**

1. **Transit Enhancements.** Customer-facing programmatic improvements that promote system connectivity, accessibility, and reliability and improve transit service experience for riders. These are meant to be smaller to mid-sized projects that produce benefits directly experienced by transit riders. Eligible projects may include but are not limited to bus stop improvements (with priority for those serving disadvantaged communities); wayfinding; real-time information; new (additional) elevators or escalators; multimodal station access and safety improvements; bicycle parking/storage; ; purchase and rehab of historic streetcars; purchase of motor coaches and paratransit expansion vehicles. Includes project development and capital costs. Sponsor Agencies: SFMTA, BART, PCJPB, TIMMA. Total Funding: TBD; EP: \$38.1M.
2. **BART Station Access, Safety and Capacity.** Improvements to stations and other facilities owned or operated by BART within San Francisco to enhance passenger safety, accessibility and



capacity, (e.g. additional elevators, staircases), improved signage and security, real time traveler information, intermodal access improvements (including improved access for passengers transferring from other transit services or bicycles), replacement and upgrade of existing escalators, elevators and faregates, and street level plaza improvements. Includes project development and capital costs. Sponsor Agencies: BART, SFMTA. Total Funding: TBD; EP: \$9.3M.

3. **Bayview Caltrain Station.** Construction of a new or relocated Caltrain station in the Bayview. Includes \$4.73M in legacy funding for the Quint-Jerrold Connector Road, which will restore access eliminated by the construction of a Caltrain berm. Includes project development and capital costs. Sponsor Agencies: SFCTA, PCJPB, SFMTA, SFPW. Total Funding: TBD; EP: \$27.7M.
4. **Mission Bay Ferry Landing.** A new ferry landing serving the Mission Bay neighborhood to enable regional ferry service. Includes capital costs. Sponsor Agency: Port of SF. Total Funding: TBD; EP: \$7M.
5. **Next Generation Transit Investments.** Planning and project development for major transit capital projects that promote system connectivity and accessibility, close service gaps, and improve and expand transit service levels. By funding planning, outreach and early project development, the intent is to set these projects up to be competitive for discretionary funds to complete project development and implementation. Eligible projects may include but are not limited to a 19<sup>th</sup> Avenue/Geary subway, extending the Central Subway, Link21 (including a potential second transbay tube), local and regional express bus network development **and transit technology systems**. Sponsor Agencies: SFCTA; SFMTA; BART; PCJPB. Total Funding: TBD; EP: \$30M.

## **PARATRANSIT**

1. **Paratransit.** Continued support for paratransit door-to-door van, taxi and other transportation 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. Sponsor Agency: SFMTA. Total Funding: TBD; EP: \$204.9M.

## **STREETS AND FREEWAYS**

### **Maintenance, Rehabilitation and Replacement Sub-Category**

1. **Street Resurfacing, Rehabilitation and Maintenance.**  
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. May include sidewalk rehabilitation and curb ramps and elements to improve resilience to climate change Includes project development and capital costs. Sponsor Agency: SFPW. Total Funding: TBD; EP: \$88M.  
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. Sponsor Agency: SFPW. Total Funding: TBD; EP: \$17M.
2. **Pedestrian and Bicycle Facilities Maintenance.** Public sidewalk repair and reconstruction citywide. Maintenance of additional pedestrian facility improvements including stairways,



retaining walls, guardrails and rockfall barriers. Maintenance of pedestrian and bicycle safety improvements including but not limited to safe hit posts, painted safety zones, green bike lanes, and crosswalks. Rehabilitation of other bicycle facilities such as paths. Includes project development and capital costs. Sponsor Agencies: SFMTA, SFPW. Total Funding: TBD; EP: \$17.6M.

### **Safe and Complete Streets Sub-Category**

1. **Safer and Complete Streets.** Programmatic improvements to the transportation system to make it safer for all users and help achieve the City's Vision Zero goals. Projects may include:
  - Traffic calming to reduce vehicular speeds and improve safety; new or improved pedestrian safety measures such as ladder crosswalks, corner bulb-outs and pedestrian islands in the medians of major thoroughfares; new and upgraded bike lanes and paths; traffic striping and channelization; bicycle and personal mobility device parking facilities such as bike/scooter racks and lockers. Quick builds (e.g. paint and safe-hit posts), pilots, permanent improvements, intersection redesigns and larger corridor projects are eligible. Landscaping may be included as a minor element of a larger safety project.
  - Installation, maintenance and upgrade of traffic signs and signals (including for pedestrians and bicyclists); red light enforcement cameras; and closed-circuit TV and communications systems (e.g. Variable Message Signs) for incident and special event traffic management.
  - Multi-modal street improvements to improve pedestrian, bicycle, transit and vehicle circulation and connectivity. Includes traffic signal improvements, signage and striping,
  - Bicycle, pedestrian and Vision Zero outreach and education programs such as Safe Routes to School; development of neighborhood and school area safety plans.

Includes project development and capital costs. Sponsor Agencies: SFMTA, SFPW, SFCTA. A minimum of \$90M will be available to the SFMTA for the maintenance and upgrade of traffic signals. Total Funding: TBD; EP: \$226.4M.

2. **Curb Ramps.** Construction of new Americans with Disabilities Act (ADA)-compliant curb ramps and related roadway work to permit ease of movement. Reconstruction of existing ramps. Includes project development and capital costs. Sponsor Agency: SFPW. Total Funding: TBD; EP: \$23.8M.
3. **Tree Planting.** Planting of new street trees in public rights-of-way throughout the city. Sponsor Agency: SFPW. Total Funding: TBD; EP: \$23.8M.

### **Freeway Safety and Operational Improvements Sub-Category**

1. **Vision Zero Ramps.** Programmatic improvements to benefit all users of intersections where freeway on- and off-ramps intersect with city streets to support the City's Vision Zero policy to eliminate traffic deaths. Eligible project types include: new or improved pedestrian safety measures such as ladder crosswalks and pedestrian signals, corner bulb-outs, and new traffic signs and signals. Includes planning, project development and capital costs. Sponsor Agencies: SFMTA, SFCTA. Total Funding: TBD; EP: \$8M.
2. **Managed Lanes and Express Bus.** Programmatic improvements to San Francisco's freeways to improve transit speeds (e.g. express bus) and reliability, and promote carpooling.





Improvements may include high occupancy vehicle lanes, ramp re-striping or re-designs, signs and signalization, purchase of buses to support increased Muni bus operations on improved facilities, and if express lanes are proposed, tolling system and funding of an affordability program. Includes project development and capital costs. Sponsor Agencies: SFCTA, SFMTA. Total Funding: TBD; EP: \$15M.

- 3. Transformative Freeway & Major Street Projects.** Planning and project development for transformative multi-modal improvements that are designed to improve safety, enhance multi-modal connectivity, and/or reconnect communities and repair the harm created by past freeway and street projects. By funding planning, outreach and early project development, the intent is to set these projects up to be competitive for discretionary funds to complete project development and implementation. Eligible project types may include, but are not limited to new grade-separated crossings for people walking and biking; restoring connections within communities divided by infrastructure (e.g. Geary underpass, pedestrian/bike freeway overcrossings); and simplifying freeway interchanges (e.g. Alemany Maze and US 101/Cesar Chavez "Hairball"). May include projects to improve resilience to climate change. Sponsor Agencies: SFCTA, SFMTA, SFPW, Planning. Total Funding: TBD; EP: \$20M.

## **TRANSPORTATION SYSTEM DEVELOPMENT & MANAGEMENT**

### **Transportation Demand Management Sub-Category**

- 1. Transportation Demand Management.** Transportation Demand Management (TDM) improvements intended to shift trips to sustainable modes like transit, biking and walking and shift travel to less congested times. Develop and support continued TDM and parking requirements for large employers, special event sites, and schools and universities. Eligible project types also include TDM education, marketing, incentives, pricing, technology, policy development, pilots, and evaluation. Hardware, software, and equipment needed to implement pricing, incentives and affordability projects are eligible. Examples of eligible projects include new solutions or technologies for first-last mile connections or special trip markets; intermodal integration of customer-facing technology (e.g. travel information and payment systems); and new fare payment concepts for mode shift or congestion management. Includes planning, project development and capital costs. Sponsor Agencies: SFCTA, SFE, SFMTA, BART, PCJPB, TIMMA. Total Funding: TBD; EP: \$30M.

### **Transportation, Land Use and Community Coordination Sub-Category**

- 1. Neighborhood Transportation Program.** The Neighborhood Transportation Program (NTP) funds community-based neighborhood-scale transportation improvements. The NTP has a planning component to fund community-based planning efforts in each Supervisorial district, and a capital component intended to provide local match to help advance and implement capital investment and pilot recommendations stemming from NTP and other community-based planning efforts. Eligible project types are those that are eligible for other Expenditure Plan programs and result in public-facing benefits. Additional project types include: transportation policy studies, pilots and projects to address climate change and (access) gaps (in equitable access). Includes planning, project development and capital costs. Sponsor Agencies: SFCTA, SFMTA, SFPW, Planning. Total Funding: TBD; EP: \$40M.
- 2. Equity Priority Transportation Program.** The Equity Priority Transportation Program (EPTP) funds equity priority community-based projects in underserved neighborhoods and areas with



vulnerable populations (e.g. low income communities, seniors, children, and/or people with disabilities) as well as citywide equity evaluations and planning efforts. The EPTP has a planning component to fund community-based planning efforts, and a capital component to provide local match funds to help advance and implement capital investment and pilot recommendations stemming from community-based planning and equity assessments.

Eligible project types are those that are eligible for other Expenditure Plan programs, as well as projects that help reduce disparities and gaps in equitable access (physical, geographic, affordability) to jobs and key services. Includes planning, project development and capital costs. Sponsor Agencies: SFCTA, SFMTA, SFPW, Planning. Total Funding: TBD; EP: \$40M.

3. **Development-Oriented Transportation.** The Development-Oriented Transportation Program funds community-based planning to identify transportation improvements that support increased housing density in existing, primarily low-density neighborhoods of the city, as well as project development and implementation. Projects supporting development in adopted Priority Development Areas will be prioritized. Includes \$2M in legacy funding for the Bayshore Caltrain Pedestrian Connection. Includes planning, project development and capital costs. Sponsor Agencies: SFMTA, SFCTA, BART, PCJPB, Planning, SFPW. Total Funding: TBD; EP: \$42M.
4. **Citywide/Modal Planning.** Citywide and network-wide transportation studies and planning such as updates to the Countywide Transportation Plan or long-range modal studies. Plans and studies that focus on countywide and/or network wide needs will be prioritized, but corridor-scale studies may be considered. Includes planning. Sponsor Agencies: SFCTA, SFMTA, Planning. Total Funding: TBD; EP: \$10M.

### Acronyms

BART – San Francisco Bay Area Rapid Transit District; EP – Expenditure Plan; GGHBTBTD – Golden Gate Bridge, Highway & Transportation District; N/A – Not Applicable; PCJPB – Peninsula Corridor Joint Powers Board or Caltrain; Planning – San Francisco Planning Department; Port of SF – Port of San Francisco; SFCTA – San Francisco County Transportation Authority; SFE – San Francisco Department of Environment; SFMTA – San Francisco Municipal Transportation Agency; SFPW – San Francisco Public Works; TBD – To Be Determined; TIMMA – Treasure Island Mobility Management Agency; TJPB – Transbay Joint Powers Authority



**Carla Short, Interim Director** | Director's Office

carla.short@sfdpw.org | T. 628.271.3078 | 49 South Van Ness Ave. Suite 1600, San Francisco, CA 94103

February 7, 2022

Committee Members

Sales Tax Program Expenditure Plan Advisory Committee

San Francisco County Transportation Authority

Dear Committee Members,

Thank you for participating as a member of the Expenditure Plan Advisory Committee and your work on improving San Francisco's transportation network. The sales tax program has been an important source of funding over the last several years and your work on this committee will shape the next 30 years of local transportation funding. In particular, I appreciate your focus on equity, making sure that we are investing the limited funds available in the communities and for the communities that need them the most.

San Francisco's Street Tree Planting and Establishment Program contributes to a more walkable, livable and sustainable city. Street trees slow traffic, improve air quality, reduce air pollution caused by combustion-engine vehicles and provide shade that will play a critical role in mitigating the effects of more frequent extreme heat events.

Our street tree planting program prioritizes planting new trees in neighborhoods with the lowest tree canopy, which are typically equity priority neighborhoods most impacted by air pollution; as well as replacing trees lost due to typical tree mortality. The sales tax program has been the most reliable funding source for the tree planting program and a reduction in funding would have a significant detrimental impact on our ability to expand the tree canopy coverage in equity-priority communities. Some neighborhoods with the lowest tree canopy coverage have been the most adversely impacted by historic car-centric transportation investments.

Tree planting is one of the smallest funding categories in the proposed expenditure plan, which already includes a significant reduction from current Proposition K funding levels. With limited reliable funding sources, any reduction in sales tax funding would have a substantial impact on the tree planting program and very little benefit to larger funding categories that have multiple other funding sources or are receiving additional funds from the recently passed federal Infrastructure Bill. As you may know, the StreetTreeSF Program provides dedicated maintenance funding for trees, but zero funding for new tree planting.

I request your support to maintain funding levels for the Tree Planting and Establishment Program and consider the important environmental benefits this program provides, particularly to equity priority communities with some of the lowest tree canopy coverage in San Francisco.

Sincerely,

Carla Short  
Interim Director  
San Francisco Public Works

[ this page intentionally left blank ]



San Francisco  
County Transportation  
Authority

# Agenda Item 5.

## Public Comment



**San Francisco  
County Transportation  
Authority**

February 10, 2022

## 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



San Francisco  
County Transportation  
Authority