Memorandum

AGENDA ITEM 8

DATE: May 25, 2023

TO: Transportation Authority Board

FROM: Anna LaForte – Deputy Director for Policy and Programming

SUBJECT: 6/13/2023 Board Meeting: Adopt Guidance for Development of the 2023 Prop L 5-Year Prioritization Programs

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RECOMMENDATION   ☐ Information   ☒ Action

Adopt guidance for development of the 2023 Prop L 5-Year Prioritization Programs (5YPPs).

SUMMARY

The Prop L Expenditure Plan requires development of 5YPPs for each program of the 28 programs to identify which specific projects will be funded over the next five years. The inaugural Prop L 5YPPs will cover Fiscal Years (FYs) 2023/24 – 2027/28. We anticipate presenting the 5YPPs to the Board in three groups. The first group, which we plan to present in July, will include just a few programs where sponsors have indicated that they may have time sensitive needs for funding, such as Paratransit; Pedestrian and Bicycle Facility Maintenance; Street Resurfacing, Rehabilitation, and Maintenance; and the Neighborhood Transportation Program. Given limitations on project sponsor and our staff resources to develop 28 5YPPs and recognizing that some 5YPPs may take a bit longer to develop given new or substantially revised programs compared to Prop K, our schedule allows for this effort to extend into the fall when we have planned for two additional rounds of 5YPP approvals. We anticipate adoption of the final Strategic Plan following approval of the last 5YPPs in November 2023. Attachment 1 includes the guidance to project sponsors for developing the 5YPPs, including the anticipated schedule for approvals, prioritization criteria for ranking projects, and Project Information Forms that when completed by sponsors will include scope, schedule, cost, funding, and supplemental information to support project evaluation and the proposed programming request.

☐ Fund Allocation

☒ Fund Programming

☐ Policy/Legislation

☐ Plan/Study

☐ Capital Project Oversight/Delivery

☐ Budget/Finance

☐ Contract/Agreement

☐ Other: ____

BACKGROUND

The Prop L Expenditure Plan describes the types of projects that are eligible for funds in the 28 Expenditure Plan programs listed in Attachment 2. It also establishes limits on sales tax funding by Expenditure Plan program and sets expectations for leveraging of sales tax funds with other federal, state and local dollars to fund the Expenditure Plan programs. However, the Expenditure Plan does not specify how much sales tax funds any given program would receive by year. Instead, the Expenditure Plan calls for development and periodic update of a 30-year Strategic Plan to determine annual funding levels for each program and to guide the day-to-day implementation of the Prop L program through the adoption of Strategic Plan policies. The Expenditure Plan also requires the development of 5YPPs for each program to identify which specific projects will be funded over the next five years. Board adoption of the Strategic Plan and a 5YPP for a given Prop L program is a prerequisite for allocation of funds from that program.

Developing the Strategic Plan is an iterative process closely linked with development of the 5YPPs and it starts with the development of the Strategic Plan Baseline (see separate agenda item for approval of the Prop L Strategic Plan Baseline). The Baseline establishes the amount of sales tax revenues that will be available on an annual basis to each of the 28 programs, by fiscal year, through 2053 based on their proportional share of available revenues established in the Expenditure Plan. This sets the pay-as-you-go annual funding levels for each program. Project sponsors can then use this information when identifying their proposed lists of projects to fund in the next five years as part of 5YPP development. Through the 5YPP process, project sponsors can make requests to advance sales tax funds for specific projects, as needed to support project delivery.

DISCUSSION

The 5YPPs provide transparency about how Prop L projects are prioritized. As established in the Prop L Expenditure Plan, each 5YPP is developed by the Transportation Authority working in close collaboration with project sponsors eligible for Prop L funds from that program, as well as any other interested agencies. Input from the Board, sponsors, and the public inform the 5YPP process.

The 5YPPs result in multi-year project lists with associated sales tax programming commitments that support a steady project pipeline, enabling project sponsors to plan ahead, facilitating their ability to secure other funding sources to leverage Prop L and fully fund projects and to line up staff resources to deliver projects. The 5-year look ahead also enables coordination between projects. When a project is ready to advance, the project sponsor can request allocation of funds from the Board based on the programming commitment in the relevant 5YPP.

The 2023 Prop L 5YPPs will cover the 5-year period starting July 1, 2023. In accordance with Expenditure Plan requirements, each 5YPP will include: a prioritization methodology to rank projects; a 5-year program or list of projects; information on scope, schedule, cost and funding (including leveraging of other fund sources); and performance measures to inform future 5YPP updates.

The draft 5YPP guidance to project sponsors, included as Attachment 1, describes the components of the 5YPP document and how the materials will be prepared. The main elements of the 5YPP include:

- **5-Year Project List (Program of Projects).** This table provides a summary of the proposed projects with programming and cash flow (i.e. proposed Prop L reimbursement schedule) by fiscal year for the relevant Expenditure Plan program.

- **Project Information Forms.** A Project Information Form is required for each proposed project. It includes information on the scope, schedule, cost, and funding plan, in addition to supplemental information to allow project evaluation using the proposed criteria.

- **Project Delivery Report.** The intent of this section is to provide a snapshot of project delivery for projects funded through the sales tax program that can be considered when we evaluate proposed new projects and associated programming requests. Transportation Authority staff will prepare a list of previously funded projects and their status (e.g.,, completed or underway). This section provides project sponsors an opportunity to outline what agencies are doing to address program-specific project delivery challenges. In the 2023 5YPPs, the information will reflect the status of Prop K projects. In future 5YPP updates, this section will include the status of projects funded by Prop L.

- **Summary of public feedback.** Transportation Authority staff will draft this section of the 5YPP. It will include a description of the public outreach and engagement that we conducted to inform the development of the 5YPPs, a summary of feedback heard, and how that feedback was integrated, as appropriate, into the documents.

- **Performance measures.** The Expenditure Plan requires that each program identifies performance measures informed by the Congestion Management Program, such as increased system connectivity, increased transit ridership (net new riders), reductions in travel time for existing riders, system safety, vehicle miles traveled, 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. Performance measures will be developed through collaboration between agencies and Transportation Authority staff.

- **Project Prioritization Methodology.** The intent of establishing and documenting a methodology to rank proposed projects is to provide the Transportation Authority Board, the public, and project sponsors with a clear understanding of how projects are prioritized for funding within an Expenditure Plan program. As described in Attachment 2 to the proposed 5YPP Guidelines, we have proposed a set of Prop L wide prioritization criteria that will be used to rank projects in every program, and program-specific prioritization criteria. The Prop L program-wide criteria include required Expenditure Plan criteria as well as criteria that we always consider: relative level of need or urgency, cost-effectiveness, a fair geographic distribution across the needs of our neighborhoods, level and diversity of community support, benefits to disadvantaged community, safety, leveraging other funds, and project readiness.

Most programs have additional criteria to inform priorities, such as improving transit reliability and travel time, or replacing assets at the end of their useful lives. We have reviewed all of the criteria and definitions with project sponsors and have integrated their feedback, as appropriate. The 5YPP document will include Prioritization Criteria Scoring Tables that will indicate how each project performs against the criteria. Project sponsors will self-score and then Transportation Authority will review the scores and vet with sponsors, as needed, to ensure consistency within programs, particularly where multiple project sponsors have submitted proposal projects.

Transportation Authority staff will review the materials submitted by project sponsors for reasonableness and consistency with Prop L requirements. We reserve the right to not consider programming funds to projects if sponsors do not provide sufficient detail to support the request. As we are developing the 5YPPs, we make corresponding updates to the Strategic Plan to reflect proposed cash flow schedules to ensure there are sufficient revenues to support the planned expenditures, including an recommended advancement of sales tax funds to support project delivery.

Schedule. Attachment 1 to the 5YPP Guidance includes a schedule of major milestones in the 2023 Prop L Strategic Plan and 5YPPs development process. Schedule adherence relies on both Transportation Authority staff and project sponsors completing their work in a timely fashion. We will work with sponsors to prepare and present the 5YPPs in three groups starting with just a small group of time sensitive requests in July and the majority coming to the Board in the fall. We may adjust some of the interim schedule milestones in consultation with sponsors, but still anticipate bringing the remaining 5YPPs and the proposed final Prop L Strategic Plan to the Board for approval in November 2023.

Public Outreach and Engagement. We are actively seeking input from the public about how San Francisco residents would like to see Prop L transportation sales tax funds spent over the next 5 years. In April, we participated in roundtables for representatives from business and community/neighborhood groups. On May 4, we hosted a meeting for interested members of the former Expenditure Plan Advisory Committee who helped develop Prop L and representatives of equity-focused community-based organizations. Upcoming opportunities to provide input include:

- May 25, 6 pm: Public Town Hall (virtual)

- Throughout May and June: online multi-lingual survey available at: sfcta.org/ExpenditurePlan

- Presentations to community groups, as requested

- Presentation to the Board and Community Advisory Committee and Board through the fall, until adoption of the final Strategic Plan and 5YPPs

The feedback that we receive will be shared with project sponsors, the Community Advisory Committee, and Board, and integrated, as appropriate, into the 5YPPs. We will also post outreach summaries on our website and in Board materials.

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FINANCIAL IMPACT

There is no impact to the Transportation Authority's amended FY 2022/23 budget or proposed FY 2023/24 budget associated with the recommended action. Allocations of Prop L funds are subject to future approvals by the Board.

CAC POSITION

The Community Advisory Committee considered this item at its May 24, 2023 meeting and unanimously adopted a motion of support for the staff position.

SUPPLEMENTAL MATERIALS

- Attachment 1 – Guidance for Development of the 2023 Prop L 5-Year Prioritization Programs
  - o Guidance Attachment 1 – Schedule
  - o Guidance Attachment 2 – Prioritization Criteria
  - o Guidance Attachment 3 – Program of Projects Template
  - o Guidance Attachment 4 – Project Information Form Template
- Attachment 2 – List of the 28 Programs in the Prop L Expenditure Plan
- Attachment 3 - Resolution

San Francisco County Transportation Authority

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

Memorandum

DATE: 04.28.2023

TO: Prop L Project Sponsors

FROM: Anna LaForte, Deputy Director for Policy and Programming

SUBJECT: DRAFT Guidance for Development of the 2023 Prop L 5-Year Prioritization Programs

This memo describes the process for developing the first Prop L 5-Year Prioritization Programs (5YPPs) and provides guidance to project sponsors on the materials that they are required to prepare. The inaugural 5YPPs will cover Fiscal Years (FYs) 2023/24 to 2027/28. The memo is organized into the following sections:

- Purpose of 5YPPs
- Overview of the 2023 5YPP Development Process
- Required Elements of the 5YPP Document
- Schedule
- Resources

PURPOSE OF 5YPPS

Development of the 5YPPs is the process by which the Transportation Authority Board identifies the projects to be funded with Prop L funds over the next 5-year period. The 5YPPs provide transparency about how the projects are selected and they give the Board and the public an opportunity to provide input early in the project development process. When the Board adopts the 5YPPs, it creates programming commitments for the specific projects to be funded over the next five years. These multi-year project lists enable project sponsors to plan ahead and facilitate their ability to secure other funding sources to fully fund projects and line up staff and other resources to support project delivery. Transportation Authority Board approval of a Strategic Plan (described in next section) and the relevant 5YPP is a prerequisite for allocation of funds from any Expenditure Plan (EP) program.

OVERVIEW OF THE 2023 5YPP DEVELOPMENT PROCESS

As established in the Prop L EP, each 5YPP is developed by the Transportation Authority working in close collaboration with project sponsors eligible for Prop L funds in each EP program, as well as any other interested agencies. Input from the Board, sponsors, and the public inform the 5YPP process. Overall, the 5YPP development process for Prop L is very similar to that for its predecessor, Prop K. Key differences include integrating several new or

revised criteria into the project prioritization process, such as project benefits to disadvantaged communities, and requiring the Transportation Authority to report at least once every five years on the citywide geographic distribution of sales tax allocations, and the distribution of projects located in Equity Priority Communities and/or benefiting disadvantaged populations. Sponsors should consider this as they develop the 5-year list of projects.

Prop L Strategic Plan Baseline. The first step in establishing the 5YPPs is establishing the Strategic Plan Baseline. The Strategic Plan is the main tool used for the day-to-day implementation of the EP. It provides transparency and accountability about how we administer the sales tax, and it serves as a key financial planning tool for the sales tax program. There are three main components to the Strategic Plan. First it establishes **policies** for the administration of the measure. We don't expect any significant changes to the Prop K policies, including core policies such as allocating funds to one phase at a time, functioning as a reimbursement-based program, assigning financing costs to the programs advancing funds, and requiring proportional spending of Prop L and non-Prop L funds, to the extent possible. These policies directly inform project sponsor proposed programming and cash flow in the 5YPPs and are critical cash management tools that we use to minimize financing costs for the overall program while seeking to have funds ready when sponsors need them to support project delivery. Second, it establishes the **sales tax revenue forecast** for the 30 years of the measure. The revenue estimates in the Strategic Plan reflect the best available data to capture current economic conditions and expectations for growth of the sales tax. Given the changes in economic conditions since the revenue projections for the EP were established in July 2021, we will be lowering projected revenues in the 2023 Strategic Plan. And finally, it includes **expenditures** such as the cost to administer the program, and funding for projects, including any debt that may be needed to advance project delivery faster than pay-as-you-go would support.

In the Strategic Plan Baseline, we use the Strategic Plan financial model to establish the amount of sales tax revenues that will be available on an annual basis to each of the Prop L programs based on their proportional share of available revenues established in the Expenditure Plan. This sets the baseline, pay-as-you-go annual funding levels for each program. Project sponsors can then use this information when identifying their proposed lists of projects to fund in the next five years as part of 5YPP development. Through the 5YPP process, project sponsors can make requests to advance sales tax funds for specific projects, as needed to support project delivery. Financing costs will be assigned proportionately to the Prop L program or programs advancing funds which will reduce the funds available for direct project costs in the relevant program(s).

There are five exceptions to the pay-as-you-go programming approach in the Strategic Plan Baseline where we are proposing to advance programming from the get-go. This is driven

by time sensitive programming needs for two of the Prop L Major Transit Projects: the Transbay Joint Powers Authority (TJPA) Caltrain Downtown Extension Project ($300 M in 2020$s) and BART's Core Capacity project ($100 M in 2020$s). TJPA and BART are requesting advancement of the maximum amount of sales tax funds for their respective projects to the first 8 years of the 30-year period. In order to provide a more realistic financing cost scenario for these projects, while ensuring we can meet other programs' requests for advancement of funds, we are also including accelerated programming and cash flow schedules in the Strategic Plan Baseline for three other programs. The 5 programs which will have accelerated programming and expenditure of sales tax funds are listed below along with a brief explanation:

- **Caltrain Downtown Rail Extension (DTX):** By August 2023, TJPA needs to demonstrate a commitment of 50% of non-Capital Investment Grant (CIG) funds for the project to meet the next Federal Transit Administration's (FTA) CIG program milestone. TJPA needs to have a firm programming commitment, but not allocation of funds by this time. The project is seeking more than $3.3 billion in Federal CIG funds.

- **BART Core Capacity:** BART is requesting a programming commitment of the maximum amount of Prop L funds available ($100 M in 2020$s) in order to request allocation of funds as soon as September 2023 to enable it to exercise an option on its railcar replacement contract. Exercising the option in October 2023 is needed to avoid a break in the production line and lock in the current contract price.

- **Paratransit**: As contemplated during the EP development process, SFMTA has expressed an interest in advancing paratransit funding with an annual inflationary increase until funding runs out to provide stability for this key program.

- **Muni Maintenance**: This program is more than double the size of any other Prop L program so it has an outsized impact on program-wide cash needs. Given that and since SFMTA has indicated it will seek advancement of funds in this program, we are proposing to include placeholders for advanced programming and expenditures of sales tax funds in the Strategic Plan Baseline.

- **Caltrain Maintenance**: Caltrain has requested a relatively modest advancement of funds in order to support development of multi-year budgets and corresponding commitments from funding partners. With $100 M in 2020$s in the EP, it is one of the larger programs.

3 Rounds of 5YPP Adoption. While the Strategic Plan presents the overall 30-year revenues and expenditures picture, the 5YPPs focus on the specific projects to be funded over the next five years in each EP program. As we work with sponsors to develop draft 5YPPs that identify projects along with the Prop L cash flows, we will make corresponding changes to the Strategic Plan expenditures and financing assumptions, ensuring that programs remain

within their EP caps or maximum amounts.   This is necessarily an iterative process where we work closely with project sponsors as the timing of cash flow needs in each of the EP programs has an impact on the amount of financing needed.

The schedule (Attachment 1) for 5YPP for adoption allows for 3 rounds or Board approvals recognizing that some 5YPPs may take a bit longer to develop (e.g., for new and substantially revised programs) and that there are limitations on sponsor resources. Round 1, which we will present to the CAC in June and Board in July, prioritizes approval of 5YPPs for a small group of programs where sponsors have indicated they have an urgent need for Prop L allocations at the beginning of the fiscal year. These programs include Street Resurfacing, Rehabilitation, and Maintenance (street cleaning equipment portion); Pedestrian and Bicycle Facility Maintenance (SFPW sidewalk maintenance); and the Neighborhood Transportation Program (program administration for a new cycle of funding available starting July 1, 2023). We are also prioritizing the Paratransit 5YPP for July Board action to provide stability for this annual program (starting July 1, 2023), as discussed above.

For Round 2, which we will present to the CAC in September and Board in October, we will take as many 5YPPs as are submitted timely and are complete. We anticipate that Round 3 would go to the Board for adoption in November. We anticipate adoption of the Final Strategic Plan in November 2023 after Board adoption of all 5YPPs. See the attached schedule for more detailed milestones and deadlines.

Public Outreach and Engagement. Transportation Authority staff will be conducting outreach to get specific input about which projects should be prioritized for Prop L funding over the next five years. We will gather feedback from the Board, CAC, public, and sponsors throughout the process to inform the Strategic Plan and 5YPPs. This outreach includes the following opportunities:

- May 4, 6 pm: Meeting for interested members of the former Expenditure Plan Advisory Committee who helped develop Prop L and representatives of equity-focused community-based organizations (virtual)

- May 25, 6 pm: Public Town Hall (virtual)

- Throughout May: online multi-lingual survey (we plan to share the link by May 5)

- Presentations at community group meetings, as requested

- CAC and Board meetings through the fall. See www.sfcta.org/events for the most up to date meeting schedules.

Sponsors are strongly encouraged to attend CAC and Board meetings where 5YPPs will be presented. Sponsors are welcome, but not required, to attend other outreach and public engagement meetings. The feedback that we receive will be shared with project sponsors

and integrated, as appropriate, into the 5YPPs. We will also post outreach summaries on our website and in Board materials.

REQUIRED ELEMENTS OF THE 5YPP

The 2023 5YPPs will cover FYs 2023/24 to 2027/28. In compliance with EP requirements, each 5YPP will include: a prioritization methodology that ranks projects within an EP program; a 5-year Program of Projects (or project list); Project Information Forms with information on scope, schedule, cost and funding (including non-Prop L funding); and performance measures. Project sponsors will be required to prepare and submit these materials to the Transportation Authority according to the schedule in Attachment 1. The 5YPP documents will also include a review of project delivery for previously funded sales tax projects to help inform funding decisions, and a summary of public outreach and engagement.

Project Delivery Report. The intent of this section is to provide transparency about the history of project delivery for projects funded through the sales tax program. Transportation Authority staff will prepare a list of projects and their status (e.g., completed or underway). This section provides project sponsors an opportunity to outline what agencies are doing to address program-specific challenges. In the 2023 5YPPs, the information will reflect the status of Prop K projects. In future 5YPP updates, this section will include the status of projects funded by Prop L.

Summary of public feedback. Transportation Authority staff will draft this section of the 5YPP. It will include a description of the public outreach and engagement that we conducted to inform the development of the 5YPPs, a summary of feedback heard, and how that feedback was integrated, as appropriate, into the documents.

Performance measures. The EP requires that each program identifies performance measures informed by the Congestion Management Program, such as increased system connectivity, increased transit ridership (net new riders), reductions in travel time for existing riders, system safety, vehicle miles traveled, 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. Performance measures will be developed through collaboration between agencies and Transportation Authority staff.

Project Prioritization Methodology. The intent of establishing and documenting prioritization criteria and methodology is to provide the Transportation Authority Board, the public, and project sponsors with a clear understanding of how projects are prioritized for funding within an EP program. The prioritization criteria, included in Attachment 2, include the voter-approved EP required criteria – relative level of need or urgency (e.g. timely-use-of-

funds requirement for matching funds), cost-effectiveness, benefits to disadvantaged populations, level and diversity of community support – plus others that reflect key policies throughout the EP and which we use for many other sources we administer, such as project readiness, leveraging of additional sources of funding, and safety. Most programs also have additional criteria to inform priorities, such as improving transit reliability and travel time, or replacing assets at the end of their useful lives. We have shared the draft prioritization criteria and definitions with project sponsor staff and have integrated your feedback as appropriate.

Project sponsors will propose scores for their own projects by filling out the **Prioritization Criteria Scoring Tables.** Transportation Authority staff will review and adjust scores as needed to ensure consistency within a given program/sub-program and across all programs as applicable. We will look to the information provided in the Project Information Forms to support the scores.

5-Year Project List (Program of Projects). Project sponsors are responsible for submitting a 5-Year Program of Projects (Attachment 3) with the list of proposed Prop L projects over the 2023 5YPP period (FY 2023/24 – 2027/28) by EP program. The Program of Projects table will provide a summary of the proposed Prop L programming and cash flow needs by fiscal year for the relevant EP program. If sponsors wish to advance funds from later years of Prop L, we will first evaluate if advancing is warranted and then determine the financing costs associated with advancing the funds. Sponsors should consult the Strategic Plan Baseline to see how much funding is available through the end of the EP period in FY 2052/53.

Project Information Forms. Project sponsors shall provide a Project Information Form (Attachment 4) for each project to be included in the 5YPP. It should include detailed information on each project, including scope, schedule, cost estimates, and funding plan. Funding requests should be rounded to the nearest thousand. The Project Information Form needs to provide the back-up information to support the project scoring and any requests to advance funds. Transportation Authority staff will review the proposed Programs of Projects and PIFs for reasonableness and consistency with Prop L requirements. We reserve the right to not consider programming funds to projects if sponsors do not provide sufficient detail in the PIFs.

SCHEDULE

Attachment 1 shows the timeline for the Strategic Plan and 5YPP development process. We will convene meetings with relevant sponsors and interested parties to help develop guidelines for some of the new programs. We will also convene meetings for discretionary programs where multiple agencies are eligible for funds. As noted above, allocations may happen concurrently with or following adoption of the 5YPP for the relevant program.

RESOURCES

For more information or assistance with this process, please email PropL@sfcta.org or contact Suany Chough at 415.522.4830 or via email at suany.chough@sfcta.org or Mike Pickford at 415-522-4822 or via email at mike.pickford@sfcta.org. Please let Transportation Authority staff know immediately if you have any issues accessing the resources or completing the application.

Please visit the websites listed below for reference materials and templates.

1. [Prop L Transportation Sales Tax](#) – general information about Prop L
   https://www.sfcta.org/ExpenditurePlan
2. [Prop L Expenditure Plan](#) – detailed text of Prop L
   https://www.sfcta.org/sites/default/files/2023-04/2022_Expenditure_Plan_Clean.pdf
3. [2023 5YPP Guidance and Templates](#) – documents referenced in this memo
   https://www.sfcta.org/2023-prop-l-5ypp-guidance-and-templates

Attachments
- Attachment 1: Schedule
- Attachment 2: Prioritization Criteria
- Attachment 3: Program of Projects Template
- Attachment 4: Project Information Form Template

2023 Prop L Strategic Plan/5-Year Prioritization Programs (5YPPs)
Draft Schedule*

April 28, 2023	SFCTA releases draft Guidance for Development of the 2023 Prop L 5YPPs
May 2023	Transportation Authority conducts online survey, presentations to community groups as requested
May 4, 2023 6:00 pm	Meeting for interested members of the former Expenditure Plan Advisory Committee and representatives of equity-focused, community based organizations (virtual)
May 24, 2023	CAC Meeting – ACTION • Strategic Plan Baseline • Guidance for Development of the 2023 Prop L 5YPPs
May 26, 2023	Round 1 5YPPs: sponsors submit draft Project Information Forms, 5-Year Program of Projects, Prioritization Criteria Scoring Tables, and performance measures
June 12, 2023	Round 1 PIFs posted on SFCTA website
June 13 and 27, 2023	Transportation Authority Board Meeting – PRELIMINARY/FINAL APPROVAL • Strategic Plan Baseline • Guidance for Development of the 2023 Prop L 5YPPs
June 20, 2023 6:00 – 7:00 pm	Prop L Town Hall (virtual)
June 28, 2023	CAC Meeting – ACTION • Round 1 5YPPs
July 11 and 25, 2023	Transportation Authority Board Meeting – PRELIMINARY/FINAL APPROVAL • Round 1 5YPPs
July 14, 2023	Round 2 5YPPs: draft materials due to Transportation Authority staff
August 15, 2023	Round 3 5YPPs: draft materials due to Transportation Authority staff

September 8, 2023	Round 2 PIFs posted on SFCTA website
September 27, 2023	CAC Meeting - ACTION • Round 2 5YPPs
September 29, 2023	Round 3 PIFs posted on SFCTA website
October 17 and 24, 2023	Transportation Authority Board Meetings - PRELIMINARY/FINAL APPROVAL • Round 2 5YPPs
October 25, 2023	CAC Meeting - ACTION • Round 3 5YPPs • 2023 Final Strategic Plan
November 14 and 28, 2023	Transportation Authority Board Meetings - PRELIMINARY/FINAL APPROVAL • Round 3 5YPPs • 2023 Final Strategic Plan

* CAC and Board meeting dates are subject to change. Please check the Transportation Authority's website for the most up-to-date schedule (www.sfcta.org/agendas). 5YPP and SP development schedule is also subject to change. Please check the Transportation Authority's website for the most up-to-date schedule (www.sfcta.org/2023-prop-l-5ypp-guidance-and-templates).

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	DRAFT Criteria	DRAFT Definition
Prop L-Wide Criteria (Note: Every program also has a safety criterion, but the definition varies by program and is found under the respective programs.)	**Project Readiness**	Priority shall be given to projects likely to need funding in the fiscal year proposed. Factors to be considered include adequacy of scope, schedule, budget and funding plan relative to current project status (e.g. expect more detail and certainty for a project about to enter construction than design); whether prior project phases are completed or expected to be completed before beginning the next phase; and whether litigation, community opposition or other factors may significantly delay project.
	Relative Level of Need or Urgency (time sensitive)	Project needs to proceed in proposed timeframe to enable construction coordination with another project (e.g. minimize costs and construction impacts), to support another funded or proposed project (e.g. signal conduit installation coordination with a street resurfacing project) or to meet timely use of funds deadlines associated with matching funds.
	Benefits to Disadvantaged Populations	Priority will be given to projects that directly benefit disadvantaged populations, including communities historically harmed by displacement, transportation policies, and projects that utilized eminent domain, whether the project is directly located in an Equity Priority Community or can demonstrate benefits to disadvantaged populations. [Benefits will be evaluated by assessing the direct impact on accessing transportation (e.g. new or enhanced infrastructure, new service or improved service, improving safety, etc.) Projects that can clearly demonstrate benefits to disadvantaged populations will rank more highly.]
	Level and Diversity of Community Support	Project has demonstrated public support from communities disproportionately impacted by past discriminatory practices, including redlining, racial covenants, urban renewal, and highway construction that divided low-income and communities of color and/or disadvantaged communities. Priority shall be given to projects with clear and diverse community support, including from disadvantaged populations and/or identified through a community-based planning process. An example of a community-based plan is a neighborhood transportation plan, corridor improvement study or station area plan that is community driven. If a project was not identified in a community-based planning process, projects with evidence of support from neighborhood stakeholders and groups plus citywide groups will be given priority over projects with evidence of support from either neighborhood stakeholders or citywide groups.

	Leveraging	Project leverages non-Prop L funds.
Prop L-Wide Criteria (Note: Not part of criteria table/scoring.)	Geographic Distribution	Priority shall be given to projects that advance the goal of achieving a fair geographic distribution of funding that takes into account the various needs of San Francisco's neighborhoods.
	Cost-Effectiveness	Priority shall be given to projects that are relatively cost-effective, e.g. project can demonstrate cost savings from coordination with other projects, project has gone through a value engineering effort, proposed scope efficiently and effectively addresses identified needs.

San Francisco County Transportation Authority

A. Major Transit Projects

Program	DRAFT Criteria	DRAFT Definition
Major Transit Projects (all programs) Criteria	Safety	Project addresses documented safety issue(s), reduces potential conflicts between modes, and/or increases security. Additional priority for projects benefiting users of multiple modes (e.g. transit passenger, pedestrian, cyclist, motorist, transit employee).
Muni Reliability and Efficiency Improvements	Improves Reliability	Project results in improved reliability, including less variable travel times and better headway adherence.
	Improves Travel Time	Project results in trip time reduction.
	Accessibility and Connectivity	Project increases transit accessibility and/or connectivity (e.g. stop improvements, travel information improvements, wayfinding, crosswalks, bulbouts, bicycle parking, and improved connections to regional transit).
Muni Rail Core Capacity	Increases Capacity	Project increases passenger capacity by supporting longer and more frequent trains. Projects that meet the FTA's Core Capacity minimum threshold of a 10% capacity increase will score higher.
	Improves Reliability	Project results in improved rail service reliability, including less variable travel times and better headway adherence. Projects that install next generation communications-based train control systems will be given high priority.
BART Core Capacity	Increases Capacity	Project increases passenger capacity through the existing Transbay Tube.
	Improves Reliability	Project improves rail service schedule adherence.
	Commensurate Alameda/Contra Costa County Contribution	Alameda and Contra Costa Counties have contributed or committed to a commensurate amount.
Caltrain Downtown Rail Extension and Pennsylvania Alignment	N/A	Prop L-wide criteria applied only (Project Readiness, Relative Level of Need or Urgency, Benefits to Disadvantaged Populations, Level and Diversity of Community Support, Leveraging, Safety).

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B. Transit Maintenance & Enhancements

Program	DRAFT Criteria	DRAFT Definition
Transit Maintenance & Enhancements (all programs) Criteria	Safety	Project improves safety for passengers, operators and/or employees. Projects that address a documented safety issue should score more highly.
Muni Maintenance: Vehicles (sub-program)	Need (Asset Useful Life)	Replaces asset at end of useful life or for transit vehicles address best practices for mid-life overhauls so that assets operate safety and reliably through the end of their useful life.
	Improves Efficiency of Transit Operations	Project supports reliable transportation services and improved efficiency.
Muni Maintenance : Facilities and Guideways (sub-program)	Need (Asset Useful Life)	Replaces asset at end of useful life.
	Improves Efficiency of Transit Operations	Project supports reliable transportation services and improved efficiency.
BART Maintenance	Need (Asset Useful Life)	Replace asset at end of useful life or overhaul/modernize mid-life to either extend useful life or so that assets operate safely and reliably through the end of their useful life.
	Improves Efficiency of Transit Operations	Project supports reliable transportation services and improved efficiency.
Caltrain Maintenance	Need (Asset Useful Life)	Replaces asset at end of useful life or for transit vehicles address best practices for mid-life overhauls so that assets operate safety and reliably through the end of their useful life.
	Improves Efficiency of Transit Operations	Project supports reliable transportation services and improved efficiency.
Ferry Maintenance	Need (Asset Useful Life)	Replaces asset at end of useful life
	Increases Capacity	Project supports increased capacity at ferry terminals to accommodate increases in ferry ridership.

	System Access & Connectivity	Project improves customer access (e.g. pedestrian access improvements, additional elevators or escalators, bike storage, etc.) and/or transit connections.
Transit Enhancements	Improves Customer Experience	Project improves the customer experience such as bus stop improvements (with priority for those serving disadvantaged communities), wayfinding, shelters, and real time travel information.
	Increases Capacity	Project increases transit capacity, such as purchase and rehab of historic streetcars, purchase of additional motor coaches, and paratransit expansion vehicles.
Bayview Caltrain Station	N/A	Prop L-wide criteria applied only (Project Readiness, Relative Level of Need or Urgency, Benefits to Disadvantaged Populations, Level and Diversity of Community Support, Leveraging, Safety).
Mission Bay Ferry Landing	N/A	Prop L-wide criteria applied only (Project Readiness, Relative Level of Need or Urgency, Benefits to Disadvantaged Populations, Level and Diversity of Community Support, Leveraging, Safety).
Next Generation Transit Investments	TBD	

San Francisco County Transportation Authority

C. Paratransit

Program	DRAFT Criteria	DRAFT Definition
Paratransit (operations & capital projects)	Safety	Project improves safety and/or improves security. Projects that address documented safety issues and/or improve safety for multiple parties (e.g. passengers, operators/paratransit staff, pedestrians, and other street users) will be given additional priority.
Paratransit: Capital Projects	Improves Customer Experience	Project improves customer experience (e.g. provides more user friendly options for payment).
Paratransit: Capital Projects	Replaces Asset at End of Useful Life	Project replaces vehicle or assets (e.g. debit card systems) at end of useful life. Vehicle projects should support electrification of the paratransit fleet, as appropriate.

D. Streets and Freeways

Program	DRAFT Criteria	DRAFT Definition
Streets and Freeways (all programs) Criteria	N/A	
Street Resurfacing, Rehabilitation, and Maintenance: Repaving and Reconstruction of City Streets (sub-program)	Safety	Project includes streets on the High Injury Network.
	Pavement Condition Index	Project includes streets with identified maintenance requirements based on the Pavement Condition Index. Streets are categorized as requiring pavement preservation (PCI 60-80), resurfacing (PCI 50-60), or paving with base repair/reconstruction (PCI 0-50). Projects with a PCI score of 60 or below will receive higher priority.
	Multi-Modal Benefits	Streets that are transit routes and/or bicycle routes will receive higher priority.
Street Resurfacing, Rehabilitation, and Maintenance: Replacement of Street Repair and Cleaning Equipment (sub-program)	Safety	Improves or mitigates a documented unsafe condition for employees.
	Need	Projects that are replacing assets at the end of their useful life will be prioritized. Clean fuel vehicles shall be considered if feasible.
Pedestrian and Bicycle Facilities Maintenance: Sidewalk Repair (sub-program)	Safety	Priority will be given to locations with reports of trip-and-fall accidents and locations with the highest likelihood of generating claims against the City and County of San Francisco.
	Proximity to Key Resources	Priority will be given to locations in proximity to community assets serving vulnerable populations (senior centers, hospitals), bus stops, and areas with high pedestrian volumes.
Pedestrian and Bicycle Facilities Maintenance: Bicycle and Pedestrian Facilities (sub-program)	Safety – High Injury Network	Project is on the High Injury Network.
	Need	Project replaces asset at end of its useful life or repairs or replaces damaged/worn assets.
Traffic Signs and Signals Maintenance	Need (Asset Useful Life)	Project replaces asset that has reached the end of useful life per industry-accepted levels.
	Safety	Project addresses documented safety issue(s) and/or reduces potential conflict between modes. Additional priority for projects benefiting multiple users of multiple modes (e.g. transit passenger, pedestrian, cyclist, motorist, transit employee), or located on the High Injury Network.

	Signal Priority for Transit and/or Emergency Vehicles	Projects which reduce delays and improve reliability for transit and/or emergency vehicles.
Safer and Complete Streets: Capital Projects (sub-program)	Safety	Project addresses documented safety issue(s) and/or reduces potential conflict between modes or is located on the High Injury Network.
	Benefits Multi-Modal Users	Project directly benefits multiple system users (e.g. pedestrians, cyclists, transit passengers, motorists).
	Proximity to Key Resources	Priority will be given to locations in proximity to community assets serving vulnerable populations (schools, senior centers, hospitals), bus stops, and areas with high pedestrian volumes.
	Complete Streets Elements	Priority will be given to projects that include complete streets elements. Specifically, priority will be given to projects that include at least a minimal level of enhancement over previous conditions. Enhancements include complete streets elements for pedestrians, cyclists, and/or transit passengers that are improvements above and beyond those triggered by the street repair and reconstruction work (e.g. ADA compliant curb ramps required because of the street repair and reconstruction work).
Safer and Complete Streets: Outreach & Education Programs (sub-program)	Safety	Project addresses documented safety issue(s).
Safer and Complete Streets: New Traffic Signals (sub-program)	Safety	Project addresses documented safety issue(s) and/or reduces potential conflicts between modes. Higher priority for projects benefiting multiple types of users (e.g. pedestrians, cyclists, motorists).
	Supports Transit First	Project improves transit service and reduces delay for transit vehicles at intersections controlled by traffic signals.
Curb Ramps	Disability Status of Requester	Requests from a person with a disability are given the highest initial priority.
	Condition of Existing Curb Ramps	Intersections with at least one corner with curb ramps in poor condition are given the highest initial priority.

	Proximity to Key Resources	Proximity to government offices and facilities, transportation, places of public accommodation, healthcare facilities, and schools.
	Proximity to Other Construction Project Locations	Projects reflect consideration of proximity to other construction and/or curb ramp project locations (for construction efficiency purposes).
	Safety	Intersection located on High Injury Network.
Tree Planting	Canopy Coverage	Priority will be given to tree planting in neighborhoods or areas with relatively low canopy coverage.
	Empty Basins	Priority will be given to tree planting in existing empty tree basins where trees are missing.
Vision Zero Ramps	Safety	Project addresses documented safety issue(s) and/or reduces potential conflict between modes. Additional priority for projects benefiting users of multiple modes (e.g. passenger, pedestrian, cyclist, transit) and projects located on the High Injury Network.
Managed Lanes and Express Bus	Safety	Project addresses documented safety issue(s) and/or reduces potential conflicts between modes.
	Improves Reliability	Project improves transit service reliability, and if applicable, improves reliability for carpools.
	Improves Travel Time	Project results in trip time reduction for transit and, if applicable, carpools.
Transformative Freeway and Major Street Projects	TBD	Criteria and/or program guidelines will be informed by the community engagement process, discussions with project sponsors and stakeholders as well as findings from the San Francisco Transportation Plan (2050) and Streets and Freeways Study.

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E. Transportation System Development & Management

Program	DRAFT Criteria	DRAFT Definition
Transportation System Development & Management (all programs) Criteria	Leveraging	For pilot programs, must identify potential source for ongoing funding should the program prove successful.
Transportation Demand Management	Safety	Project addresses documented safety and/or security issue.
	Mode Shift and/or Time Shift	Project will lead to a shift in single-occupancy vehicle trips to more sustainable modes such as transit, biking and walking, and/or shifts trips to less congested times. Additional priority given with evidence that benefits of program continue after program completion.
	Cost-Effectiveness	Cost effectiveness can be demonstrated by status as Plan Bay Area high-performer, cost per single-occupancy vehicle trip reduced, or cost-effectively increasing person throughput.
Neighborhood Transportation Program	Safety	Project addresses documented safety issue(s); and/or reduces potential conflicts between modes. Projects that benefit users of multiple modes, e.g. walking, cycling, driving, etc. will be given additional priority.
Equity Priority Transportation Program	Safety	Project addresses documented safety issue(s), reduces potential conflict between modes, and/or increases security.
	Supports Equitable Access	Plans or capital projects that help reduce disparities and gaps in equitable access (physical, geographic, affordability) to jobs and key services such as schools, senior centers, and other community sites. Full points for projects that provide broad geographic benefits and/or significantly improve access in an EPC or for a disadvantaged population. Partial points for projects that provide benefits with limited geographic distribution and/or moderate access improvements in an EPC or for a disadvantaged population.
	Geographic Distribution	For plans and studies, priority will be given to EPCs that have not had a recent community-based transportation planning process.
	Limited Other Funding Options	For project development and implementation, priority will be given to projects/project phases that have limited other funding options (in Prop L or otherwise).
	Supports Increased Housing Density in	Through community-based planning, project identifies and/or enables project development and implementation of transportation improvements that support increased housing density in

Development-Oriented Transportation	**Low-Density Neighborhoods**	existing, primarily low-density neighborhoods. Transportation Authority staff will consult with the Planning Department to develop a definition of "low-density" neighborhoods for the purpose of applying this criterion.
	Priority Development Areas (PDAs)	Projects supporting development in adopted Priority Development Areas will be prioritized.
Citywide/Modal Planning	**Safety**	Project addresses documented safety issue(s), reduces potential conflict between modes, and/or increases security.

Attachment 3
2023 Prop L 5-Year Project List (FY 2023/24 - FY 2027/28)
EP Program (select from list)
Pending XX, 2023 Board Meeting

Agency	Project Name	Phase	Fiscal Year					Total
			2023/24	2024/25	2025/26	2026/27	2027/28	
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
								$0
	Funds Requested in 2023 5YPP		$0	$0	$0	$0	$0	$0
	Funds Programmed in 2023 Strategic Plan Baseline		$0	$0	$0	$0	$0	$0
	Cumulative Remaining Programming Capacity		$0	$0	$0	$0	$0	$0

2023 Prop L 5-Year Project List (FY 2023/24 - FY 2027/28)
EP Program (select from list)
Cash Flow (Maximum Annual Reimbursement)
Pending XX, 2023 Board Meeting

Project Name	Phase	Fiscal Year								Total
		2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
										$0
Cash Flow Requested in 2023 5YPP		$0	$0	$0	$0	$0	$0	$0	$0	$0
Cash Flow in 2023 Strategic Plan Baseline		$0	$0	$0	$0	$0	$0	$0	$0	$0
Cumulative Remaining Cash Flow Capacity		$0	$0	$0	$0	$0	$0	$0	$0	$0

Project Name and Sponsor	
Project Name:	
Implementing Agency:	
Prop L Expenditure Plan Information	
Prop L Program:	
Prop L Sub-Program (if applicable):	
Other Prop L Programs (if applicable):	
Project Information	
Brief Project Description for MyStreetSF (80 words max):	
Project Location and Limits:	
Supervisorial District(s):	

Is the project located on the 2022 Vision Zero High Injury Network ?		**Is the project located in an Equity Priority Community (EPC)?**	
Which EPC(s) is the project located in?			
Detailed Scope (may attach Word document): Please describe in detail the project scope, any planned community engagement, benefits, considerations for climate adaptation and resilience (if relevant), and coordination with other projects in the area (e.g. paving, Vision Zero).			
maps, drawings, photos of current conditions, etc. to support understanding of the project.			
Type of Environmental Clearance Required:			
Coordinating Agencies: Please list partner agencies and identify a staff contact at each agency.			

Project Delivery Milestones	Status	Work	Start Date		End Date	
Phase	**% Complete**	**In-house - Contracted - Both**	**Quarter**	**Fiscal Year (starts July 1)**	**Quarter**	**Fiscal Year (starts July 1)**
Planning/Conceptual Engineering						
Environmental Studies (PA&ED)						
Right of Way						
Design Engineering (PS&E)						
Advertise Construction						
Start Construction (e.g. Award Contract)						
Operations (i.e. paratransit)						
Open for Use						
Project Completion (means last eligible expenditure)						
Notes						

Project Name:	0

Project Cost Estimate

Phase	Cost	Funding Source		Source of Cost Estimate
		Prop L	Other	
Planning/Conceptual Engineering	$ -	$ -	$ -	
Environmental Studies (PA&ED)	$ -	$ -	$ -	
Right of Way	$ -	$ -	$ -	
Design Engineering (PS&E)	$ -	$ -	$ -	
Construction	$ -	$ -	$ -	
Operations (i.e. paratransit)	$ -	$ -	$ -	
Total Project Cost	$ -	$ -	$ -	
Percent of Total				

Funding Plan - All Phases - All Sources

Cash Flow for Prop L Only (i.e. Fiscal Year of Reimbursement)

Fund Source	Prop L Program	Phase	Fund Source Status	Fiscal Year of Allocation (Programming Year)	Total Funding	2023/24	2024/25	2025/26	2026/27	2027/28
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
					$ -	$ -	$ -	$ -	$ -	$ -
				Total By Fiscal Year	$ -	$ -	$ -	$ -	$ -	$ -

Notes

Prop L Sales Tax Program
Project Information Form (PIF) Template

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Prop L Supplemental Information Please fill out each question listed below (rows 2-8) for all projects.		Additional Instructions
Project Name	*0*	
Relative Level of Need or Urgency (time sensitive)		Describe time sensitivity of the project, e.g. it needs to proceed in proposed timeframe to enable construction coordination or to meet timely use of funds deadlines associated with matching funds.
Prior Community Engagement/Level and Diversity of Community Support (may attach Word document):		Does the project have demonstrated public support from communities disproportionately impacted by past discriminatory practices? Describe any community outreach that has occurred and whether the project is included in a community-based plan (e.g. Community Based Transportation Plan, Participatory Budgeting process, neighborhood transportation plan, corridor improvement study, or station area plan that is community driven). If not in a community-based plan, provide evidence of support from neighborhood stakeholders and citywide groups.
Benefits to Disadvantaged Populations and Equity Priority Communities		Describe how the project directly benefits disadvanted populations, whether the project is located in an Equity Priority Community or not. Benefits will be evaluated by assessing the direct impact on accessing transportation (e.g. new or enhanced infrastructure, improving safety, etc).
Compatability with Land Use, Design Standards, and Planned Growth		Is the project compatible with existing and planned land uses, with adopted standards for urban design and for the provision of pedestrian amenities, and supportive of planned growth in transit-friendly housing, employment, and services?
San Francisco Transportation Plan Alignment (SFTP)		Select all goals that apply from the drop-down list to the left.
		Describe how the project advances the selected SFTP goal(s).
The next section includes criteria that are specific to each Expenditure Plan program. The questions that are required to be filled out for each program will auto-populate once the Prop L program is selected on the Scope & Schedule tab.		Additional Instructions
The Prop L Expenditure Plan program selected in the Scope & Schedule tab will display here.		

EP 1 Muni Reliability and Efficiency Improvements Please fill out all questions in this section for projects that fall under the Muni Reliability and Efficiency Improvements program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses documented safety issue(s), reduces potential conflict between modes, and/or increases security. Indicate if the project benefits users of multiple modes (e.g. transit passenger, pedestrian, cyclist, motorist, transit employee). Define and provide data to support the safety issue(s) that is being addressed by the project. If the project is located on the High Injury Network, please list the locations.
Improves Reliability		Describe how the project improves reliability, including less variable travel times and better headway adherence.
Improves Travel Time		Describe how the project results in trip time reduction.
Accessibility and Connectivity		Describe how the project increases transit accessibility and/or connectivity.
EP 2 Muni Rail Core Capacity Please fill out all questions in this section for projects that fall under the Muni Rail Core Capacity program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses documented safety issue(s), reduces potential conflict between modes, and/or increases security. Indicate if the project benefits users of multiple modes (e.g. transit passenger, pedestrian, cyclist, motorist, transit employee). Define and provide data to support the safety issue(s) that is being addressed by the project. If the project is located on the High Injury Network, please list the locations.
Increases Capacity		Describe how the project increases passenger capacity. Does the project meet FTA's Core Capacity minimum threshold of a 10% capacity increase?
Improves Reliability		Describe how the project improves rail service reliability, including less variable travel times and better headway adherence.

EP 3 BART Core Capacity Please fill out all questions in this section for projects that fall under the BART Core Capacity program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses documented safety issue(s), reduces potential conflict between modes, and/or increases security. Indicate if the project benefits users of multiple modes (e.g. transit passenger, pedestrian, cyclist, motorist, transit employee). Define and provide data to support the safety issue(s) that is being addressed by the project. If the project is located on the High Injury Network, please list the locations.
Increases Capacity		Describe how the project increases passenger capacity through the existing Transbay Tube.
Improves Reliability		Describe how the project improves transit service schedule adherence.
Commensurate Alameda/Contra Costa County Contribution		Have Alameda and Contra Costa Counties contributed or committed to a commensurate amount of funding?
EP 5 Caltrain Downtown Rail Extension and Pennsylvania Alignment Please fill out all questions in this section for projects that fall under the Caltrain Downtown Rail Extension and Pennsylvania Alignment program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses documented safety issue(s), reduces potential conflict between modes, and/or increases security. Indicate if the project benefits users of multiple modes (e.g. transit passenger, pedestrian, cyclist, motorist, transit employee). Define and provide data to support the safety issue(s) that is being addressed by the project. If the project is located on the High Injury Network, please list the locations.

EP 6 Muni Maintenance Please fill out all questions in this section for projects that fall under the Muni Maintenance program in the Prop L Expenditure Plan.		
Safety		Describe how the project improves safety for passengers, operators and/or employees, and how the project addresses a documented safety issue.
Need (Asset Useful Life) (Vehicles Sub-program)		Describe if the project replaces an asset at the end of its useful life or for transit vehicles addresses best practices for mid-life overhauls so that assets operate safely and reliably through the end of their useful life.
Improves Efficiency of Transit Operations (Vehicles Sub-program)		Describe how the project supports reliable transportation services and improved efficiency.
Need (Asset Useful Life) (Facilities and Guideways Sub-program)		Describe if the project replaces and asset at the end of its useful life.
Improves Efficiency of Transit Operations (Facilities and Guideways Sub-program)		Describe how the project supports reliable transportation services and improved efficiency.
EP 7 BART Maintenance Please fill out all questions in this section for projects that fall under the BART Maintenance program in the Prop L Expenditure Plan.		
Safety		Describe how the project improves safety for passengers, operators and/or employees, and how the project addresses a documented safety issue.
Need (Asset Useful Life)		Describe if the project replaces an asset at the end of its useful life or overhauls/modernizes mid-life to either extend the useful life or so that assets operate safely and reliably through the end of their useful life.
Improves Efficiency of Transit Operations		Describe how the project supports reliable transportation services and improved efficiency.

EP 8 Caltrain Maintenance Please fill out all questions in this section for projects that fall under the Caltrain Maintenance program in the Prop L Expenditure Plan.		
Safety		Describe how the project improves safety for passengers, operators and/or employees, and how the project addresses a documented safety issue.
Need (Asset Useful Life)		Describe if the project replaces an asset at the end of its useful life or for transit vehicles addresses best practices for mid-life overhauls so that assets operate safely and reliably through the end of their useful life.
Improves Efficiency of Transit Operations		Describe how the project supports reliable transportation services and improved efficiency.
EP 9 Ferry Maintenance Please fill out all questions in this section for projects that fall under the Ferry Maintenance program in the Prop L Expenditure Plan.		
Safety		Describe how the project improves safety for passengers, operators and/or employees, and how the project addresses a documented safety issue.
Need (Asset Useful Life)		Describe if the project replaces an asset at the end of its useful life.
Increases Capacity		Describe how the project supports increased capacity at ferry terminals to accommodate increases in ferry ridership.

EP 10 Transit Enhancements Please fill out all questions in this section for projects that fall under the Transit Enhancements program in the Prop L Expenditure Plan.		
Safety		Describe how the project improves safety for passengers, operators and/or employees, and how the project addresses a documented safety issue.
System Access & Connectivity		Describe how the project improves customer access and/or transit connections.
Improves Customer Experience		Describe how the project improves or enhances the customer experience, particularly for disadvantaged communities.
Increases Capacity		Describe how the project increases transit capacity, such as purchase and rehab of historic streetcars, purchase of additional motor coaches, and paratransit vehicle expansion.
EP 11 Bayview Caltrain Station Please fill out all questions in this section for projects that fall under the Bayview Caltrain Station program in the Prop L Expenditure Plan.		
Safety		Describe how the project improves safety for passengers, operators and/or employees, and how the project addresses a documented safety issue.
EP 12 Mission Bay Ferry Landing Please fill out all questions in this section for projects that fall under the Mission Bay Ferry Landing program in the Prop L Expenditure Plan.		
Safety		Describe how the project improves safety for passengers, operators and/or employees, and how the project addresses a documented safety issue.
EP 13 Next Generation Transit Investments Please fill out all questions in this section for projects that fall under the Next Generation Transit Investments program in the Prop L Expenditure Plan.		
Safety		Describe how the project improves safety for passengers, operators and/or employees, and how the project addresses a documented safety issue.
TBD		Criteria will be informed by discussions with project sponsors, and recommendations fro the San Francisco Transportation Plan, Connect SF Transit Investment Strategy and other plans.

EP 14 Paratransit Please fill out all questions in this section for projects that fall under the Paratransit program in the Prop L Expenditure Plan.		
Safety (Operations and Capital Projects)		Describe how the project improves safety and/or improves security. Describe if the project addresses documented safety issues and/or improves safety for multiple parties (e.g., passengers, operators/paratransit staff, pedestrians, and other street users.
Improves Customer Experience (Capital Projects)		Describe how the project improves the customer experience (e.g. provides more friendly options for payment).
Replaces Asset at End of Useful Life (Capital Projects)		Describe how project replaces vehicle or assets (e.g. debit card systems) at end of useful life. Vehicle projects should support electrification of the paratransit fleet, as appropriate.
EP 15 Street Resurfacing, Rehabilitation, and Maintenance Please fill out all questions in this section for projects that fall under the Street Resurfacing, Rehabilitation, and Maintenance program in the Prop L Expenditure Plan.		
Safety (Repaving and Reconstruction of City Streets - Sub-program)		If the project is located on the High Injury Network, please list the locations.
Pavement Condition Index (Repaving and Reconstruction of City Streets - Sub-program)		Specify if the project includes streets with identified maintenance requirements based on the Pavement Condition Index. Streets are categorized as requiring pavement preservation (PCI 60-80), resurfacing (PCI 50-60), or paving with base repair/reconstruction (PCI 0-50).
Multi-modal Benefits (Repaving and Reconstruction of City Streets - Sub-program)		List the streets in the project that are on transit routes and/or bicycle routes.
Safety (Replacement of Street Repair and Cleaning Equipment - Sub-program)		Describe how the project improves or mitigates a documented unsafe condition for employees.
Need (Replacement of Street Repair and Cleaning Equipment - Sub-program)		Is this project replacing assets at the end of their useful life? Has the department considered replacing the asset with clean fuel vehicles? If not, why not.

EP 16 Pedestrian and Bicycle Facilities Maintenance Please fill out all questions in this section for projects that fall under the Pedestrian and Bicycle Facilities Maintenance program in the Prop L Expenditure Plan.		
Safety (Sidewalk Repair - Sub-program)		Does the project include locations with reports of trip-and-fall accidents and locations with the highest likelihood of generating claims against the City and County of San Francisco?
Proximity to Key Resources (Sidewalk Repair - Sub-program)		Describe if the project includes locations in proximity to community assets serving vulnerable populations, bus stops, and areas with high pedestrian volumes.
Safety (Bicycle and Pedestrian Facilities - Sub-program)		If the project is located on the High Injury Network, please list the locations.
Need (Bicycle and Pedestrian Facilities - Sub-program)		Describe if the project replaces asset at end of its useful life or repairs or replaces damaged/work assets.
EP 17 Traffic Signs and Signals Maintenance Please fill out all questions in this section for projects that fall under the Traffic Signs and Signals Maintenance program in the Prop L Expenditure Plan.		
Safety		Describe and provide data showing how the project addresses documented safety issue(s) and/or reduces potential conflict between modes. Indicate if the project benefits multiple users of multiple modes (e.g. transit passenger, pedestrian, cyclist, motorist, transit employee). Indicate if project is located on the High Injury Network and provide location.
Need (Asset Useful Life)		State if the project is replacing an asset that has reached the end of useful life per industry-accepted leves.
Signal Priority for Transit and/or Emergency Vehicles		Describe how project reduces delays and improves reliability for transit and/or emergency vehicles.

EP 18 Safer and Complete Streets Please fill out all questions in this section for projects that fall under the Safer and Complete Streets program in the Prop L Expenditure Plan.		
Safety (Capital Projects - Sub-program)		Define and provide data to support the safety issue(s) that is being addressed by the project. Describe how the project addresses documented safety issue(s) and/or reduces potential conflict between modes. If project is on the High Injury Network indicate that and provide location.
Benefits Multi-Modal Users (Capital Projects - Sub-program)		Describe how the project directly benefits multiple system users (e.g. pedestrians, cyclists, transit passengers, motorists).
Proximity to Key Resources (Capital Projects - Sub-program)		Describe if the project includes locations in proximity to community assets serving vulnerable populations, bus stops, and areas with high pedestrian volumes.
Complete Streets Elements (Capital Projects - Sub-program)		Describe the complete streets elements that are included in the project, calling out those improvements that provide enhancement over the previous condition and that go above and beyond improvements triggered by street repair or construction work such as providing ADA compliant curb ramps.
Safety (Outreach and Education Programs - Sub-program)		Describe how the project addresses documented safety issue(s) and provide data or research demonstrated effectiveness, as relevant.
Safety (New Traffic Signals - Sub-program)		Describe how the project addresses documented safety issue(s) and/or reduces potential conflict between modes. Provide data or research demonstrated effectiveness, as relevant.
Supports Transit First (New Traffic Signals - Sub-program)		Discuss how the project improves transit service and reduces delay for transit vehicles at intersections controlled by traffic signals.

EP 19 Curb Ramps Please fill out all questions in this section for projects that fall under the Curb Ramps program in the Prop L Expenditure Plan.		
Safety		If the project is located on the High Injury Network, please list the locations.
Other Curb Ramp Prioritization: Disability Status of Requester, Condition of Existing Curb Ramps, Proximity to Key Resources, Proximity to Other Construction Project Locations		Given the high volume of curb ramps locations anticipated in an annual allocation request, SFPW will describe how the curb ramps are prioritized, including disability status of requester, condition of existing curb ramps, proximity to key resources, proximity to other construction project locations, and location on the High Injury Network. At time of allocation, SFPW will need to confirm that it has prioritized locations consistent with the 5YPP criteria. If requested, SFPW shall provide SFCTA access to the data for the purposes of confirming that the prioritization criteria are applied as described.
EP 20 Tree Planting Please fill out all questions in this section for projects that fall under the Tree Planting program in the Prop L Expenditure Plan.		
Canopy Coverage		Priority will be given to tree planting in neighborhoods or areas with relatively low canopy coverage. Given the high volume of tree planting locations anticipated in an annual allocation request, SFPW will describe how the planting locations are prioritized, including canopy coverage and empty basins. At time of allocation, SFPW will need to confirm that it has prioritized locations consistent with the 5YPP criteria. If requested, SFPW shall provide SFCTA access to the data for the purposes of confirming that the prioritization criteria are applied as described.
Empty Basins		Priority will be given to tree planting in existing empty tree basins where trees are missing. Given the high volume of tree planting locations anticipated in an annual allocation request, SFPW will describe how the planting locations are prioritized, including canopy coverage and empty basins. At time of allocations, SFPW will need to confirm that it has prioritized locations consistent with the 5YPP criteria. If requested, SFPW shall provide SFCTA access to the data for the purposes of confirming that the prioritization criteria are applied as described.
EP 21 Vision Zero Ramps Please fill out all questions in this section for projects that fall under the Vision Zero Ramps program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses documented safety issue(s), and/or reduces potential conflict between modes. Indicate if the project benefits users of multiple modes (e.g. pedestrian, cyclist, motorist, transit). Provide data to support the safety issue(s) that is being addressed by the project. If the project is located on the High Injury Network, please list the locations.

EP 22 Managed Lanes and Express Bus Please fill out all questions in this section for projects that fall under the Managed Lanes and Express Bus program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses documented safety issue(s) and/or reduces potential conflict between modes.
Improves Reliability		Describe how the project improves transit service reliability, and if applicable, improves reliability for carpools.
Improves Travel Time		Describe how the project results in trip time reduction for transit and, if applicable, carpools.
EP 23 Transformative Freeway and Major Street Projects Please fill out all questions in this section for projects that fall under the Transformative Freeway and Major Street Projects program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses documented safety issue(s) and/or reduces potential conflict between modes.
TBD		Criteria and/or program guidelines will be informed by the community engagement process, discussions with project sponsors, and recommendations fro the San Francisco Transportation Plan, Connect SF Streets and Freeways Study and other plans.
EP 24 Transportation Demand Management Please fill out all questions in this section for projects that fall under the Transportation Demand Management program in the Prop L Expenditure Plan.		
Safety		Define and provide data to support the safety and/or security issue(s) that is being addressed by the project. Describe how the project addresses the documented issue(s).
Mode Shift and/or Time Shift		Describe how the project will lead to a shift in single-occupancy vehicle trips to more sustainable modes. Provide any evidence of effectiveness, including whether benefits of program continue after program completion.
Cost-Effectiveness		Discuss if project demonstrated cost-effectiveness as demonstrated by status as a Plan Bay Area high-performer, cost per single-occupancy vehicle trip reduced, or cost-effectively increasing person throughput, as applicable.

Pilot Program Funding Plan		For pilot programs, identify an ongoing funding plan should the program prove successful. Note the Transportation Authority will develop guidelines for pilots eligible to be funded by Prop L from this and other Prop L programs.
EP 25 Neighborhood Transportation Program Please fill out all questions in this section for projects that fall under the Neighborhood Transportation program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses documented safety issue(s) and/or reduces potential conflict between modes. Indicate if the project benefits users of multiple modes (e.g. transit passenger, pedestrian, cyclist, motorist, transit employee). Define and provide data to support the safety issue(s) that is being addressed by the project.
Pilot Program Funding Plan		For pilot programs, identify an ongoing funding plan should the program prove successful. Note the Transportation Authority will develop guidelines for pilots eligible to be funded by Prop L from this and other Prop L programs.
EP 26 Equity Priority Transportation Program Please fill out all questions in this section for projects that fall under the Equity Priority Transportation program in the Prop L Expenditure Plan.		
Safety		Describe how the project addresses the documented safety issue(s), reduces potential conflict between modes, and/or increases security. Define and provide data to support the safety issue(s) that is being addressed by the project. If the project is located on the High Injury Network, please list the locations.
Supports Equitable Access .		Describe how the project reduces disparities and gaps in equitable access to jobs and key services.
Geographic Distribution		Does this project include a plan or study in an Equity Priority Community that has not had a recent community-based transportation plannign process?
Limited Other Funding Options		Does this project have other funding options (in Prop L or otherwise).
Pilot Program Funding Plan		For pilot programs, identify an ongoing funding plan should the program prove successful. Note the Transportation Authority will develop guidelines for pilots eligible to be funded by Prop L from this and other Prop L programs.

EP 27 Development-Oriented Transportation Please fill out all questions in this section for projects that fall under the Development-Oriented Transportation program in the Prop L Expenditure Plan.		
Supports Increased Housing Density in Low-Density Neighborhoods		Describe how the project will identify and/or enable project development and implementation of transportation improvements that support increased housing density in existing, primarily low-density neighborhoods. Transportation Authority staff will consult with the Planning Department to develop a definition of "low-density" neigbhorhoods for the purpose of applying this criterion.
Priority Development Areas (PDAs)		Does this project support development in adopted Priority Development Areas?
EP 28 Citywide/Modal Planning Please fill out all questions in this section for projects that fall under the Citywide/Modal Planning program in the Prop L Expenditure Plan.		
Safety		Define and provide data to support the safety issue(s) that is being addressed by the project. Describe how the project addresses the documented safety issue(s), reduces potential conflict between modes, and/or increases security. If the project is located on the High Injury Network, please list the locations.

Attachment 2.
Programs in the Prop L Expenditure Plan

Board approval of a 5-Year Prioritization Program or 5YPP is a prerequisite for allocation of Prop L funds from that program. As part of the 5YPP development process, for some of the 28 programs, we have created sub-programs to help track minimum funding amounts established in the Expenditure Plan for certain projects types (e.g. Safe Routes to School education and outreach), to group like projects together to facilitate project ranking, and/or to help ensure funding is set aside for key priorities (e.g. transit vehicle replacement and capital maintenance).

1. Muni Reliability and Efficiency Improvements
2. Muni Rail Core Capacity
3. BART Core Capacity
4. Caltrain Service Vision: Capital System Capacity Investments
5. Caltrain Downtown Rail Extension and Pennsylvania Alignment
6. Muni Maintenance
   - Vehicles (sub-program)
   - Facilities and Guideways (sub-program)
7. BART Maintenance
8. Caltrain Maintenance
9. Ferry Maintenance
10. Transit Enhancements
11. Bayview Caltrain Station
12. Mission Bay Ferry Landing
13. Next Generation Transit Investments
14. Paratransit
15. Street Resurfacing, Rehabilitation and Maintenance
    - Repaving and Reconstruction of City Streets (sub-program)
    - Replacement of Street Repair and Cleaning Equipment (sub-program)
16. Pedestrian and Bicycle Facilities Maintenance
    - Sidewalk Repair (sub-program)
    - Bicycle and Pedestrian Facilities (sub-program)
17. Traffic Signs and Signals Maintenance
18. Safer and Complete Streets
    - Capital Projects (sub-program)
    - Outreach & Education Programs (sub-program)
    - New Traffic Signals (sub-program)
19. Curb Ramps
20. Tree Planting
21. Vision Zero Ramps
22. Managed Lanes and Express Bus
23. Transformative Freeway and Major Streets Projects
24. Transportation Demand Management
25. Neighborhood Transportation Program

Attachment 2.
Programs in the Prop L Expenditure Plan

26.   Equity Priority Transportation Program
27.   Development Oriented Transportation
28.   Citywide/Modal Planning

**San Francisco
County Transportation
Authority**

BD061323 _____ RESOLUTION NO. 23-XX

RESOLUTION ADOPTING GUIDANCE FOR DEVELOPMENT OF THE 2023 PROP L
5-YEAR PRIORITIZATION PROGRAMS

      WHEREAS, In November 2022, San Francisco voters approved Proposition L
(Prop L), extending the existing half-cent local transportation sales tax and adopting a
new 30-year Expenditure Plan; and

      WHEREAS, The Prop L Expenditure Plan describes the types of projects that
are eligible for funds in the 28 Expenditure Plan programs, establishes limits on sales
tax funding by Expenditure Plan program, and sets expectations for leveraging of
sales tax funds, but does not specify how much sales tax funds any given program
would receive by year, nor does it identify specific projects for funding in programs;
and

      WHEREAS, The Expenditure Plan requires development of a 5-Year
Prioritization Program (5YPP) for each of the 28 programs (see Attachment 1),
identifying which specific projects will be funded over the next five years, as a
prerequisite for allocation of funds; and

      WHEREAS, The 5YPPs provide transparency about how Prop L projects are
prioritized and the resulting 5-year project lists and associated sales tax
programming commitments support a steady project development pipeline,
enabling project sponsors to plan ahead, facilitating their ability to secure other
funding sources to leverage Prop L and fully fund projects, to line up staff resources,
and to coordinate with other planned projects; and

      WHEREAS, In accordance with Expenditure Plan requirements, each 5YPP will
include: a prioritization methodology to rank projects; a 5-year program or list of
projects; information on scope, schedule, cost and funding (including leveraging of
other fund sources); and performance measures to inform future 5YPP updates; and

      WHEREAS, The 2023 5YPPs will cover Fiscal Years 2023/24 through 2027/28;
and

WHEREAS, Outreach and engagement for the development of the 5YPPs is ongoing, including an online multi-lingual survey and a Public Town Hall, which is scheduled for June 20, 2023; and

WHEREAS, Attachment 2 includes the draft guidance to project sponsors for developing the 5YPPs, including the anticipated schedule, prioritization criteria for ranking projects, and Project Information Forms that when completed by sponsors will include scope, schedule, cost, funding, and supplemental information to support project evaluation and the proposed programming request; and

WHEREAS, Staff anticipate presenting the 5YPPs to the Board for adoption in three groups, with the first group limited to time sensitive requests in July and the remaining groups in fall 2023; and

WHEREAS, At its May 24, 2023 meeting, the Community Advisory Committee was briefed on the subject request and unanimously adopted a motion of support for the staff recommendation; now, therefore, be it

RESOLVED, That the Transportation Authority hereby adopts the Guidance for Development of the 2023 Prop L 5-Year Prioritization Programs; and be it further

RESOLVED, That the Executive Director shall communicate this information to the appropriate parties.

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Attachments:
1. List of the 28 Programs in the Prop L Expenditure Plan
2. Guidance for Development of the 2023 Prop L 5-Year Prioritization Programs
   - Guidance Attachment 1 – Schedule
   - Guidance Attachment 2 – Prioritization Criteria
   - Guidance Attachment 3 – Program of Projects Template
   - Guidance Attachment 4 – Project Information Form Template