CAC Meeting
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Item 8
Enclosure 1

2023 Prop L 5-Year Prioritization Program

Managed Lanes and Express Bus

Draft Report: July 2024

San Francisco
County Transportation
Authority

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This report was prepared by the San Francisco County Transportation Authority in coordination with the San Francisco Municipal Transportation Agency.

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1. Introduction

In November 2022, San Francisco voters approved Proposition L (Prop L), extending the ½-cent sales tax to fund transportation improvements and approving a new 30-year Expenditure Plan, which superseded the prior Proposition K Expenditure Plan. The Prop L Expenditure Plan determines eligibility for sales tax funds through a list of 28 programs. It also sets caps for the maximum amount of Prop L funds that will be available for specific programs over the 30-year Expenditure Plan period, totaling up to an estimated $2.6 billion (2020 $'s). In order to fully fund the programs, the Expenditure Plan assumes that the Prop L dollars will leverage (or match) another $23.7 billion (2020 $'s) in other federal, state, regional, and local funds for a total program cost of $26.3 billion (2020 $'s). Some of those leveraged funds will be distributed to San Francisco through funding formulas. In other cases, San Francisco project sponsors will have to aggressively compete for discretionary funds in order to fully fund the Expenditure Plan programs.

The Expenditure Plan includes a number of requirements, including the development of 5-Year Prioritization Programs (5YPPs) as a condition for receiving allocations in each program in the Expenditure Plan. The 5YPPs are intended to provide a stronger link between project selection and expected project performance, to support on time, on-budget project delivery, and optimize use of federal, state and regional matching funds. Other major benefits of the 5YPPs include:

- Provide transparency about how Prop L projects are prioritized,
- Enable public input early and throughout the planning process, and
- Improve agency coordination within and across projects at the earlier stages of the planning process.

The desired outcome of the 5YPPs is the establishment of a strong pipeline of grant-ready transportation projects that can be advanced as soon as funds (including Prop L, federal, state, and other funds) are available. The 5YPPs are critically important to help achieve the leveraging needed to fully fund the Expenditure Plan programs.

As its centerpiece, each 5YPP contains a 5-year Program of Projects (or project list), ideally including project descriptions, schedule milestones, cost estimates, and full funding plans showing Prop L funds by fiscal year and other matching funds. The Program of Projects (project list) for Managed Lanes and Express Bus is contained in Section 7 of this document.

2. Eligibility and Expected Fund Leveraging

2.1 | ELIGIBILITY

Eligibility for Managed Lanes and Express Bus as identified in the voter approved Prop L Expenditure Plan is as follows, with amounts shown in millions of 2020 dollars:

"Programmatic improvements to San Francisco's freeways to improve transit speeds (e.g., express bus) and reliability, and promote carpooling. Improvements include but are not limited to high occupancy vehicle lanes, ramp re-striping or re-designs, signs and signalization, and 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: $206M; EP: $10M."

SFCTA stands for San Francisco County Transportation Authority and SFMTA stands for the San Francisco Municipal Transportation Authority.

2.2 | EXPECTED FUND LEVERAGING

Leveraging Prop L funds against non-Prop L fund sources is necessary to fully fund the Expenditure Plan programs. Prop L sales tax funds will be used as seed funding for planning and project development to make projects competitive for discretionary fund sources, and to serve as local match needed to secure federal, state, regional, and other grant funding.

Based on Priority 1 (conservative forecast) funding levels, for Managed Lanes and Express Bus, the Prop L Expenditure Plan assumes that for every $1 of sales tax revenue spent, on average it would be leveraged by about $19.60 in non-Prop L funds. The Transportation Authority reviews leveraging at the project and project phase (e.g. planning, design, construction) levels as well as for each Expenditure Plan program as a whole.

3. Public Engagement

Transportation Authority staff conducted public engagement to inform the development of the 5YPPs. This section summarizes feedback heard from that engagement, as well as information provided by project sponsors regarding public engagement and community support.

During the Prop L Expenditure Plan development, the Transportation Authority conducted a robust outreach process from Spring 2021 – Winter 2022 and was guided by an advisory committee of 27 community members representing neighborhood, business, labor, civic, and environmental groups. The New Expenditure Plan for San Francisco's Half-Cent Sales Tax for Transportation: Outreach Findings report can be found on the Transportation Authority website. A high level summary of the key themes emerging from this outreach included the following:

- There are varied needs and desires from different communities based in different parts of the city.
- Improving transit had broad support, including improvements to reliability, customer experience, better connections, and additional service.
- Safety and accessibility were a primary concern for many, including improving pedestrian and bicyclist safety and accessibility for seniors and people with disabilities.
- Putting equity at the forefront, including focusing investment in Equity Priority Communities and serving people with low incomes, was critical for many.
- Better connections between neighborhoods, especially considering changing pandemic travel patterns, and localized engagement around transportation solutions were emphasized.

Feedback also included the need to address traffic congestion, and robust support for transit speed and reliability improvements.

As part of development of the 5YPPs, the Transportation Authority conducted outreach and hosted public meetings to gather input about which specific projects and project types should be funded through Prop L in the next five years and to seek input on how to select projects for each Expenditure Plan program. The meetings included a virtual meeting for interested members of the former Expenditure Plan Advisory Committee who helped develop Prop L and representatives of equity-focused community-based organizations; a virtual town hall; and presentations at community group meetings, as requested. There was also an online multi-lingual survey and opportunities for public input through the Transportation Authority's website and at multiple Transportation Authority Community Advisory Committee and Transportation Authority Board meetings. The Transportation Authority website also includes a list of staff contacts to facilitate public engagement directly with project sponsors.

Key themes emerging from this process were similar to what we heard during the Expenditure Plan development effort including support for transit reliability improvements, including transit-only lanes; reduced transit travel times; addressing all

travel modes; and reducing congestion. To learn more about our engagement process and findings, visit sfcta.org/ExpenditurePlan.

4. Performance Measures

Prop L requires the establishment of performance measures for each program in the Expenditure Plan. The intent is to demonstrate the system performance benefits of sales tax projects (e.g. reduced transit travel time), to ensure funds are being used cost effectively, and to inform programming of future Prop L funds, as well as programming and prioritization of other funds by the Transportation Authority (e.g. Transportation Fund for Clean Air, Prop AA Vehicle Registration Fee funds).

After reviewing San Francisco's Congestion Management Program and consulting with eligible sponsoring agencies, the Transportation Authority recommends that the following performance measures be applied to projects and included in the Managed Lanes and Express Bus 5YPP:

- Increased person throughput
- Improved safety (e.g. collision trends)
- Increased average transit speeds (express bus)
- Improved transit reliability (express bus)
- Increased carpool rates
- Improved auto/transit speed ratio

While not recommended as performance measures, the Transportation Authority will also track the following metrics (and possibly others to be determined) for this program which is intended to identify and develop projects to be competitive for other fund sources and other Prop L programs:

- Traffic volumes
- Transit ridership

5. Project Delivery Snapshot

Since this is the inaugural Prop L 5YPP, we are looking to the prior Prop K sales tax program to assess project delivery trends for similar types of projects. Project delivery for previously-funded projects is one important consideration when we evaluate project sponsors' proposed requests for Prop L funding, particularly with respect to project readiness.

As required by the Prop L Expenditure Plan, the next 5YPP update will be informed by a citywide geographic distribution of sales tax project allocations and the distribution of projects located in Equity Priority Communities and/or benefiting disadvantaged populations.

Prop K Project Delivery

Prop K has previously funded SFCTA's planning of Managed Lanes as shown in Table 1.

Table 1. Prop K Project Status- Open Grants

SPONSOR	PROJECT NAME	PHASE(S) FUNDED	FY OF ALLOCATION	ALLOCATED (AS OF JUNE 2024)	REMAINING BALANCE (AS OF JUNE 2024)	OPEN FOR USE?
SFCTA	101/280 Carpool and Express Lane	Environmental	2019/20	$2,800,000	$1,145,680*	

*Invoices pending. SFCTA staff has requested an amendment to this Prop K grant to allow $679,000 of the remaining balance to be used for the SF Freeway Network Management Study.

The Transportation Authority's 2018 Freeway Corridor Management Study (FCMS) studied Express Lanes on US Highway 101 and Interstate 280 in both directions. In October 2019, Caltrans approved the Project Initiation Document for the implementation of managed lanes along 101/280 in both San Francisco and San Mateo Counties, which identified the project scope of work and recommended design alternatives. Following Caltrans approval, the Transportation Authority Board appropriated $4.1 million in Prop K funds to initiate the project approval and environmental document (PA/ED) phase for the Express Lanes and Bus Program project. In November 2020, the project team removed the consideration of an express lane option from the scope based on feedback from the Board and subsequently deobligated $1.3 million of the original appropriation, resulting in a project budget of $2.8 million.

The northbound direction project proceeded into the PA/ED phase as a carpool and bus lane only project, without a priced Express Lane component. Since the FCMS had recommended an Express Lane in the southbound direction, further planning and engagement work was required to define a project concept for the southbound direction. The project also experienced delay due to changes in Caltrans' project approval processes following the 2021 adoption of the Climate Action Plan for Transportation Infrastructure (CAPTI).

Conceptual alternative designs for both directions of 101/280 have been completed. For the northbound direction, the project collected traffic data, analyzed existing traffic conditions, and completed preliminary design for I-280 northbound from 18th Street to 3rd Street. Staff presented the preliminary designs to the public in November

2023, where the community expressed concerns about the potential impacts of the project and the potential to generate more traffic. The northbound project was paused at that time, and Transportation Authority staff is seeking to amend the Prop K grant to use the remaining balance for the SF Freeway Network Management Study, one of the projects proposed to be funded through this 5YPP.

6. Project Prioritization

The intent of establishing and documenting a methodology to select 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 each Prop L program. Working in consultation with project sponsors and drawing upon the Transportation Authority's experience with prioritizing projects for grant funding, Transportation Authority staff developed a set of Prop L program-wide criteria to help select projects in each of the 28 Prop L programs. In addition, most programs also have program-specific criteria to inform priorities such as improving transit reliability and travel time or replacing assets at the end of their useful lives. The Prop L program-wide criteria include:

- Project readiness
- Relative level of need or urgency
- Benefit to disadvantaged populations
- Level and diversity of community support
- Leveraging

The above criteria, along with any program-specific criteria, are scored for each proposed project. In addition, the evaluation process also considers a fair geographic distribution and cost-effectiveness.

San Francisco's Equity Priority Communities are an important factor in assessing projects and benefits to disadvantaged populations. See the map on the Transportation Authority's website: https://epc-map.sfcta.org/

The Project Scoring Table in Section 7 shows the Prop L program-wide criteria, the program-specific criteria, criteria definitions, and maximum possible points for projects proposed for the Managed Lanes and Express Bus 5YPP. Transportation Authority staff reviewed the scoring to ensure consistent application of the prioritization criteria across programs.

7. Project List

This section shows how each project proposed for funding from the Managed Lanes and Express Bus program ranked based on the prioritization methodology described in Section 6; the 5-Year Program of Projects or Project List recommended for Prop L funds; and Anticipated Leveraging. The Project Information Forms with details on scope, schedule, cost, funding are included in Appendix A.

In March 2023, staff presented an informational item regarding Express Lanes in the Bay Area region to the Transportation Authority Board. Several Board members requested that staff develop a proposed scope of work for considering a pricing option in further evaluation of San Francisco's freeway network.

The proposed SF Freeway Network Management Study project advances this request and the recommendations from the ConnectSF Streets and Freeways Strategy and SFTP 2050, which both recognized the need for managed lanes on the San Francisco Freeway Network. The proposed scope of work is also informed by feedback from the Northbound I-280 project outreach and from the Transportation Authority's Community Advisory Committee.

The Metropolitan Transportation Commission's (MTC's) Next Generation Bay Area Freeways Study also provides context for the SF study. MTC is analyzing the feasibility, costs, benefits and public support for tolling certain Bay Area freeways as a strategy for delivering reliably high-speed travel and reducing greenhouse gas emissions caused by passenger vehicles to help meet climate goals. MTC's study is expected to conclude by summer 2024.

Approving the Managed Lanes and Express Bus 5YPP requires amending the Prop L Strategic Plan to advance funds from future years into the current five-year period. The recommended project list would advance $803,827, which is 85% over the pay-go amount ($946,173) in the first five years of the 30-year program. This program is one of the smallest programs ($10 million in 2020$) in Prop L. Advancing funds beyond the baseline amount will invest in needed planning to identify and prioritize projects that will guide the use of the remaining Prop L funds for this program. The planning work will also help to set projects up to be more competitive for discretionary sources.

Prop L Project Submissions Evaluation - EP 22 Managed Lanes and Express Bus

		Prop L-Wide Criteria					Program Specific Criteria			
District	**Projects**	**Project Readiness**	**Relative Level of Need or Urgency (time sensitive)**	**Benefits to Disadvantaged Populations**	**Level and Diversity of Community Support**	**Leveraging**	**Safety**	**Improves Reliability**	**Improves Travel Time**	**Total**
Citywide	SF Freeway Network Management Study	3	0	2	0	1	0	2	2	10
TBD	SF Freeway Network Management Placeholder	*This is a placeholder. Project(s) will be scored at time of allocation.*								
	Total Possible Score	5	4	5	5	4	4	4	4	35

Project Scoring Key: Projects are assessed using Transportation Authority Board adopted Prop L-wide criteria and program specific prioritization criteria. In general, the better a project meets the criteria as defined, the more points the project is assigned.

Project Readiness: Highest possible score is 5. Project is likely to need funding in the fiscal year proposed. Factors to be considered include, but are not limited to 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 pose a significant risk to project advancement, as proposed.

Relative Level of Need or Urgency (time sensitive): Highest possible score is 4. Project needs to proceed in the 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: Highest possible score is 5. Project provides direct benefits to disadvantaged populations, including communities historically harmed by displacement, transportation policies, and projects that utilized eminent domain. Project directly impacts the ability of disadvantaged populations to access transportation (e.g. new or enhanced infrastructure, new service or improved service, improved safety, etc.), whether or not the project is directly located in an Equity Priority Community. Points are based on the description of benefits presented in the Project Information Form.

Level and Diversity of Community Support: Highest possible score is 5. Project has clear and diverse community support, including from disadvantaged populations and/or was developed out of a community-based planning process.

Five points for a project that 1) is in an adopted community based plan or with evidence of diverse (neighborhood level and citywide) community support and 2) has documented support from disadvantaged populations.
Three points for a project not in an adopted community based plan, but with evidence of support from *both* neighborhood stakeholders and citywide groups. Project does not have documented support from disadvantaged populations.
One point for a project not in an adopted community based plan, but with evidence of support from *either* neighborhood stakeholders or citywide groups. Project does not have documented support from disadvantaged populations.
Zero points for a project that was neither developed out of a community-based planning process nor has other forms of demonstrated community support.

Leveraging: Highest possible score is 4. Project demonstrates actual or potential leveraging of Prop L funds, as indicated in the funding plan. Factors to consider include the status of other fund sources and the likely competitiveness for securing non-Prop L funds from discretionary sources.

Safety: Highest possible score is 4. Project addresses documented safety issue(s) and/or reduces potential conflicts between modes. Points are based on the safety information presented in the Project Information Form.

Improves Reliability: Highest possible score is 4. Project improves transit service reliability, and if applicable, improves reliability for carpools while increasing person throughput.

Improves Travel Time: Highest possible score is 4. Project results in trip time reduction for transit and, if applicable, carpools while minimizing increases in traffic volume and travel times in general purpose lanes and local streets.

2023 Prop L 5-Year Project List (FY 2023/24 - FY 2027/28)
22- Managed Lanes and Express Bus
Programming Year
Pending July 2024 Board Meeting

Agency	Project Name	Phase	Fiscal Year of Allocation					Total
			2023/24	2024/25	2025/26	2026/27	2027/28	
SFCTA	SF Freeway Network Management Study	Planning/ Conceptual Engineering		$1,000,000				$1,000,000
TBD	SF Freeway Network Management Placeholder	TBD			$750,000			$750,000
Funds Requested in 2023 5YPP			$0	$1,000,000	$750,000	$0	$0	$1,750,000
Funds Programmed in 2023 Draft Strategic Plan Baseline			$105,130	$210,261	$210,261	$210,261	$210,261	$946,173
Cumulative Remaining Programming Capacity			$105,130	($684,609)	($1,224,348)	($1,014,087)	($803,827)	($803,827)

2023 Prop L 5-Year Project List (FY 2023/24 - FY 2027/28)
22- Managed Lanes and Express Bus
Cash Flow (Maximum Annual Reimbursement)
Pending July 2024 Board Meeting

Project Name	Phase	Fiscal Year of Reimbursement					Total
		2023/24	2024/25	2025/26	2026/27	2027/28	
SF Freeway Network Management Study	Planning/ Conceptual Engineering		$500,000	$500,000			$1,000,000
SF Freeway Network Management Placeholder	TBD			$375,000	$375,000		$750,000
Cash Flow Requested in 2023 5YPP		$0	$500,000	$875,000	$375,000	$0	$1,750,000
Cash Flow in 2023 Draft Strategic Plan Baseline		$105,130	$210,261	$210,261	$210,261	$210,261	$946,173
Cumulative Remaining Cash Flow Capacity		$105,130	($184,609)	($849,348)	($1,014,087)	($803,827)	($803,827)

Anticipated Leveraging

The table below compares Prop L Expenditure Plan assumptions with anticipated leveraging for the recommended projects based on the Project Information Forms.

Table 2. Prop L Leveraging: Expected vs. Proposed for Fiscal Years 2023/24 – 2027/28

PROJECT	EXPECTED LEVERAGING IN EP (NON-PROP L FUNDS)	ANTICIPATED LEVERAGING (NON-PROP L FUNDS)
SF Freeway Network Management Study	95.1%	22.9%
SF Freeway Network Management Placeholder	95.1%	TBD
Managed Lanes and Express Bus Program Total	**95.1%**	**TBD**

The proposed project has a relatively low leveraging at 22.9% compared to expected leveraging at 95.1% due to a relative lack of sources for these types of planning efforts. We expect that the SF Freeway Network Management Study will help position recommended projects to be more competitive for discretionary grants for later project phases.

Appendix A

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

San Francisco County Transportation Authority

Project Name and Sponsor			
Project Name:	SF Freeway Network Management Study		
Implementing Agency:	SFCTA		
Prop L Expenditure Plan Information			
Prop L Program:	22- Managed Lanes and Express Bus		
Project Information			
Brief Project Description for MyStreetSF (80 words max):	The study will consider managed lane alternatives, including priced lane options, for freeways within San Francisco (i.e., Central Freeway, I-80, US 101, I-280) with the goals of reducing vehicle miles traveled and increasing person throughput. This project would consider a facility design that does not increase the overall capacity of the freeway, pricing options, and programmatic elements to reduce transportation barriers and maintain affordability. The study will develop recommendations for a priced managed lanes program on priority segments on San Francisco's freeway network, consisting of facility design, operations plan, and related programmatic elements.		
Project Location and Limits:	San Francisco Freeways (i.e., Central Freeway, I-80, US 101, I-280)		
Supervisorial District(s):	Citywide		
Is the project located on the 2022 Vision Zero High Injury Network ?	No	**Is the project located in an Equity Priority Community (EPC)?**	Yes
Which EPC(s) is the project located in?	Bayview, Visitacion Valley-Portola, Oceanview-Ingleside, Excelsior-Outer Mission		
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).	See attached Detailed Scope		
Attachments: Please attach maps, drawings, photos of current conditions, etc. to support understanding of the project.			
Type of Environmental Clearance Required:	TBD		
Coordinating Agencies: Please list partner agencies and identify a staff contact at each agency.	SFMTA, SF Planning, SFDPW, Caltrans (HQ and D4), San Mateo, MTC		

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			Q1-Jul-Aug-Sep	2024/25	Q2-Oct-Nov-Dec	2026/27
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

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

San Francisco County Transportation Authority

Project Name:	SF Freeway Network Management Study

Project Cost Estimate		**Funding Source**			
Phase	**Cost**	**Prop L**	**Other**	**Source of Cost Estimate**	
Planning/Conceptual Engineering	$ 2,179,000	$ 1,000,000	$ 1,179,000	Prior work	Includes $679,000 in Prop K sales tax
Environmental Studies (PA&ED)	$ -	$ -	$ -		
Right of Way	$ -	$ -	$ -		
Design Engineering (PS&E)	$ -	$ -	$ -		
Construction	$ -	$ -	$ -		
Operations (i.e. paratransit)	$ -	$ -	$ -		
Total Project Cost	$ 2,179,000	$ 1,000,000	$ 1,179,000		
Percent of Total		**46%**	**54%**		**23%** Leveraging of non-sales tax funds

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**
Prop L	22- Managed Lanes and Express Bus	Planning/Conceptual Engineering	Planned	2024/25	$ 1,000,000		$500,000	$500,000		$ -
Caltrans STP Partnerships		Planning/Conceptual Engineering	Planned		$ 500,000					$ -
Prop K		Planning/Conceptual Engineering	Allocated		$ 679,000					$ -
				Total By Fiscal Year	**$ 2,179,000**	**$ -**	**$ 500,000**	**$ 500,000**	**$ -**	**$ -**

Notes

In January 2024, on behalf of the SFCTA, the Metropolitan Transportation Commission on behalf of SFCTA submitted a $500,000 Sustainable Transportation Planning Grant application to Caltrans for this project. We expect to hear from Caltrans in Summer 2024 if we were successful in obtaining this grant. The Prop L funds would help meet the required 20% local match contribution for this grant.

Prop L Supplemental Information **Please fill out each question listed below (rows 2-8) for all projects.**	
Project Name	***SF Freeway Network Management Study***
Relative Level of Need or Urgency (time sensitive)	This project has a low level of urgency. However, the Study responds to the SFCTA Board's interest, expressed during the March 2023 information item on Regional Express lanes implementation, to re-introduce express lanes into the scope of the Managed Lanes Program.
Prior Community Engagement/Level and Diversity of Community Support (may attach Word document):	The SFCTA had a series of almost 40 conversations in 2017 and 2018 one-on-ones with CBOs. There has not been more recent outreach on this project. These conversations were across a diverse set of stakeholders and resulted in a guarded/limited level of support.
Benefits to Disadvantaged Populations and Equity Priority Communities	Disadvantaged populations and EPC residents often have to travel at times when non-driving options are limited and travel further distances on the freeway. Others have employment that relies upon them having a vehicle. Additionally, within San Francisco, many of the EPCs are directly adjacent to freeway corridors and experience impacts associated with air quality, noise, and congestion. The project will ultimately recommend a managed lane program that improves the operation of the freeways to reduce travel times, VMT, PM/NOx/greenhouse gas emissions, and improve travel time reliability. The project will also seek to understand travel needs for EPC residents related to freeway travel and develop a comprehensive program that expands travel options including transit servce on the freeway and addresses affordability concerns of a managed lane. The overall program could bring benefits to freeway-adjacent communities, even if not directly related to the lanes themselves.
Compatability with Land Use, Design Standards, and Planned Growth	Yes
San Francisco Transportation Plan Alignment (SFTP)	Economic Vitality, Equity, Accountability and Engagement
	The Managed Lanes program is included as a recommendation in the SFTP2050. The project primarily supports the SFTP goals of equity, economic vitality, accountability and engagement by supporting mode shift, reducing VMT and GHG, and improving access to jobs and commute times. The project would also consider implementation and ongoing operational costs to ensure the program is feasible. The project would use a broad engagement strategy.

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.	
22- Managed Lanes and Express Bus	
Safety	The project does not directly address documented safety issues but would seek to improve safety as one of the goals.
Improves Reliability	A core goal of the proposed study is to identify and develop a managed lanes program that provides a travel time and reliability benefit to transit and HOVs through a travel lane that is priced to maintain a ~45 MPH.
Improves Travel Time	A core goal of the proposed study is to identify and develop a managed lanes program that provides a travel time and reliability benefit to transit and HOVs through a travel lane that is priced to maintain a ~45 MPH.

Attachment 1

SF Freeway Network Management Study
Detailed Scope

The SF Freeway Network Management Study responds to March 2023 Transportation Authority Board member feedback to resume consideration of pricing as a tool to improve the overall efficiency (as measured by person throughput) of the freeway and reduce vehicle miles traveled within San Francisco.

Background
The Transportation Authority completed the Freeway Corridor Management Study (FCMS) Phase 2 in November 2018 which included analysis of four managed lanes options:

1. No Build: The configuration of freeways remains as it is today
2. High occupancy vehicle (HOV) 2+: High Occupancy Vehicle (carpool) with a two-person minimum requirement.
3. HOV3+: High Occupancy Vehicle (carpool) with a three-person minimum requirement.
4. High occupancy toll (HOT) 3+: Express Lane with a three-person minimum carpool requirement

A recommendation of the FCMS was to further study equity impacts of managed lanes and develop programs to address the impacts.

Following the FCMS, the Transportation Authority began the 101/280 Express Lanes and Bus Project "Project Study Report" (PSR) process with Caltrans, which focused on implementation of the HOT3+ option. The PSR identified alternatives to implement the HOT3+ option but did not provide a recommendation.

Caltrans approved the PSR for the 101/280 Express Lanes and Bus Project in October of 2019, and project work was anticipated to move into the environmental clearance (PAED) phase in 2021. During this time, the MTC adopted its Managed Lanes Strategic Plan that included a facility for 101/280 in SF, and the Transportation Authority conducted pre-environmental scoping work for both the HOT3+ option studied in the PSR, and the HOV3+ lane option, as part of a comprehensive program package.

In November 2019, the Transportation Authority Board appropriated $4.1 million in Prop K to partially fund the PAED phase for 101/280 Express Lanes and Bus Project. The adopted Scope associated with this appropriation would have delivered the milestone of the Draft Environmental Documents for the study area included in the PSR. In November 2020, Transportation Authority staff removed the consideration of an express lane option from the scope based on feedback from the SFCTA Board.

In February 2021, the Transportation Authority deobligated $1.3 million of the original total, resulting in a total project budget of $2.8 million. The corresponding reduction in scope included limiting and pausing the environmental and engineering work for all alternatives in the southbound direction of travel (in addition to the prior removal of any express lanes alternatives from analysis).

In a parallel effort, San Mateo County has been working to implement the US-101 Mobility Action Plan (MAP) which was completed in Spring 2021 and identifies near-term policies, programs, and technological solutions to address impacts of their managed lanes project.

In 2022, Transportation Authority staff began traffic and other environmental analyses for the northbound direction of travel. In November 2023, the Transportation Authority initiated a round of outreach for the Northbound I-280 Transit and Carpool Lane Study. This work focused on two main transit/carpool lane design options under consideration for the relatively short segment (<1 mile) at the northern terminus of I-280N from the 18th Street overcrossing to King/5th Streets:

- Option 1: I-280N Left-side Traffic Lane Conversion – Changing the existing (left side) #1 general purpose lane to transit/carpool use only, with #2 (right side) lane remaining a general purpose lane
- Option 2: I-280N Shoulder Conversion – Changing the existing left side freeway shoulder to transit/carpool lane use via striping (not physical widening of the roadway), leaving the #1 and #2 freeway traffic lanes for general purpose traffic use.

The scope also considered the possibility of extending either of the above configurations onto King Street to further prioritize public transit and carpools as they continue on local streets.

Some issues that community members raised during these outreach meetings include:

- The potential to increase delay to general (non HOV) traffic on the freeway (with long queues resulting from Option 1: Left Side Traffic Lane Conversion
- The potential to generate more traffic (increased vehicle trips and vehicle miles of travel) in the area or cause traffic to divert to other exits (e.g. 6th Street) or surface street routes
- The potential impacts of the project (negative and positive) on pedestrian safety and neighborhood livability
- The challenge of enforcing transit/carpool lane violations
- The benefits to transit riders and carpools and potential to attract new riders/carpoolers resulting in moving people more efficiently through the corridor.

At the April 23, 2024 meeting of the Transportation Authority Board, MTC staff presented an update on their ongoing Next Generation Bay Area Freeways Study (NGFS). The NGFS is an early and immediate action in response to Plan Bay Area 2050's Strategy T5, which called for the implementation of per-mile tolling on congested freeways with transit alternatives in support of a reduction in regional VMT and resultant GHG emissions to meet the region's state-mandated GHG reduction targets. The NGFS is exploring whether there are equitable as well as technically and politically feasible pathways towards implementing Strategy T5 in the medium to long term. Transportation Authority staff recognize that all-lane tolling is a bold, new strategy that was added out of necessity to close the GHG reduction gaps in Plan Bay Area 2050.

SF Freeway Network Management Study

Community /CAC feedback and the NGFS shaped the proposed study scope shaped the current scope for this proposed SF Freeway Network Management Study, which will take a comprehensive

look at San Francisco's Freeway Network and use new travel data to understand where a managed lane program will best support transportation goals, including a reduction in vehicle miles traveled. The project scope is consistent with the Managed Lanes and Express Bus program in the Prop L expenditure plan.

At the March 29, 2023 meeting of the Transportation Authority Board, staff presented an informational update on Express Lanes in the Bay Area. At that meeting, Board members Chair Mandelman, Vice Chair Melgar, and Commissioner Peskin requested that staff develop a proposed scope of work for considering a priced managed lane in further evaluation of the design of freeways through/ within San Francisco.

The SF Freeway Network Management Study responds to that Board feedback; to outreach feedback; and advances the ConnectSF Streets and Freeways Strategy and SFTP 2050, which both recognize the need for managed lanes on the San Francisco Freeway Network, and supports the regional effort around Managed Lanes by filling a gap in the managed lane network between San Mateo County and the East Bay.

Part 1 of this project includes Tasks 2 and 3 below, an overall scan of the freeway network, identification of priority segments for further study, and development of a purpose statement and goals. This part is expected to take approximately 8 months. The team will present the findings from Part 1 to the board for review and direction before proceeding with the remaining tasks.

The project budget assumes the use of remaining Prop K funds for the Northbound 101/280 study. Prop K funding remains because the environmental work for the Northbound 101/280 project was not completed due to community feedback. A Caltrans Planning Grant, which would fund a portion of this study, was submitted in Winter 2023/24 for potential award in Summer 2024. If we do not receive the Caltrans Planning Grant in this cycle, we will apply again in the next cycle and pursue other funding options including potentially requesting additional Prop L funds from the SF Freeway Network Management Placeholder. We will also assess the budget and evaluate whether some scope can be adjusted.

Task 1: Project management

The Transportation Authority will conduct ongoing management of the project, including consultant procurement and coordination with city and regional agency staff.

Deliverables: Consultant procurement, regular reporting on project status

Task 2: Identify Priority Managed Lane Segments for Future Study

Using available data and considerations developed in prior phases of work, a high level design and operations assessment will be conducted to identify a prioritized set of feasible segments for managed lane implementation and further study. The process will consider two primary questions to assess feasibility—1. which freeway segments can support a physical design that does not require increasing capacity and/or the physical footprint of the freeway infrastructure, and 2. is there an option to incorporate pricing that is operationally sound and supports study purposes? Question 1 will be answered by developing a high level design that considers right of way and existing pinch points on the corridor. This may include conceptual civil engineering drawings at up to three

locations including freeway interchanges and along I-80 where there are left and right side exits. As part of this task, as built diagrams, freeway striping plans, and other necessary documents will be requested from Caltrans or other relevant agencies. Question 2 will be answered by updating previous SF-CHAMP model estimates to screen priced lane options for operations, VMT impacts, and financial feasibility. This task includes up to 20 CHAMP runs and summaries with documentation. Answering these questions will allow for the priority segments to be identified based on the high level screening of benefits and feasibility. The final outcome of this Task will be a set of up to five locations on the freeway network to further study a managed lane or managed facility program.

A working group will be established during this process composed of community representatives and SFCTA Community Advisory Committee (CAC) members; the group will convene up to 3 times during this task to advise staff on the project teams' analysis process, findings, and ultimate selection of segments for further study.

A risk and mitigations matrix will also be developed as part of this task and will serve as a living document to determine risk levels throughout the study.

Deliverables: Priority segment selection, Risk assessment

Task 3: Purpose Statement and Goals

The project team will develop a purpose statement, project goals, and objectives to guide the development of concepts and evaluation. The purpose and goals will also consider public and stakeholder engagement, ConnectSF/the SFTP/Streets and Freeways Study, the Climate Action Plan, 101 Mobility Action Plan, and other relevant plans or past studies.

Deliverables: Draft and final memo of study purpose, goals, and objectives

Task 4: Technical Advisory Committee

The project team will establish a Technical Advisory Committee (TAC) to collect feedback on the outreach process, technical analysis, design alternatives, and programmatic elements. The TAC will also be valuable in providing lessons learned from other Bay Area managed lane projects. The TAC will be made up of representatives from SFMTA, Planning Department, Department of Public Works, MTC, San Mateo (C/CAG and SMCTA), and Caltrans (District 4 and HQ). The TAC is estimated to meet up to six times throughout the project.

Through the TAC, interagency Deputy and Director level meetings will be held at key project milestones to ensure alignment with city and regional agencies.

Deliverables: Draft and final TAC meeting materials, meeting notes
Cost/ staffing notes for budget: Assume TA lead development + meetings with consultant support and attendance

Task 5: Travel modeling

Evaluation metrics and criteria will be developed based on 101/280 Managed Lane Project 1 Study, Streets and Freeways Strategy Analysis, and input from the TAC, and building on criteria from Task 2 and and Goals/Objectives identified in Task 3.

Subtask 5a: Existing Conditions
This subtask will include required and optional data collection to support analysis. Household travel survey diary data will be used to create traveler profiles for all freeway segments. Required data collection also includes traffic counts and conditions on ramps, the freeway mainline, and on adjacent corridors that provide freeway access. This subtask will also include analysis of crash data, greenhouse gas emissions data, and other relevant data on freeway mainline and freeway adjacent corridors. "Big data" sources (e.g. Streetlight) may also be used to conduct origin-destination analysis and pre- vs. post-pandemic travel pattern analysis. To the extent possible, this task will use work and analysis completed from the Streets and Freeways Study and Connect SF.

Subtask 5b: Travel modeling
Travel modeling will be conducted of the priority segments identified in Task 2 using SF-CHAMP for the following scenarios::

- Current year
- Opening year and future year no project
- Opening year and future year for two geometric alternatives
- Opening year and future year for two pricing structure alternatives

To the extent possible, the modeling definitions will align with new PBA 2050+ and SFTP 2050+ land use allocations and transportation network assumptions, and reflect pricing and ramp/ lane configuration changes.

Deliverables: Existing conditions report, Model output data tables and summaries, Memo of analysis findings, raw data from data collection

Task 6: Geometric Design / 5% Engineering Drawings
Using the feasibility design assessment developed in task 2, the consultant will refine the proof of concept and develop both cross sections and plan views at 5% designs for segments selected in Task 2 for managed lanes on freeways within San Francisco. Each design will be technically feasible with considerations of right of way, current conditions, transit routes, and other core functions of the freeway and corridor, as well as findings from public outreach, as applicable. All designs will assume the conversion of an existing general purpose lane into the managed lane and will not include lane additions, mainline shoulder conversions, or freeway widening. However, designs that consider shoulder conversion/lane addition within the existing physical footprint at the county line may be needed to create lane connections, in the Baseline and/or the Build alternatives. A brief memo outlining key features, benefits, tradeoffs, constraints, risks, and planning level cost estimates will accompany the design alternatives.

Deliverables: conceptual drawings for 5 alternatives, memo of design alternatives

Task 7: Program Development

In addition to managed lane alternatives, the project team will develop up to five sets of program alternatives to increase transportation options that reduce transportation barriers for non-driving modes and ensure affordability. These alternatives will support goals to reduce VMT and increase the use of non-drive alone options. The alternatives will also be based on community outreach findings and known transportation needs along freeway corridors in SF. The alternatives will include implementation costs and tied to managed lane alternatives to ensure feasibility and overall financial sustainability.

Deliverables: Memo of Program Alternatives

Task 8: Alternatives Evaluation

Each of the physical freeway managed lanes designs will include benefits and tradeoffs. The physical designs will be paired with program alternatives to be evaluated against project goals and metrics. Economic and operational analysis will be conducted (see Subtask 9b) to provide system and operational elements of the overall cost estimate for each alternative, as well as gross and net revenue findings for each alternative. The alternatives and staff evaluation will be brought to the public for feedback to guide refinement and the ultimate selection design for up to two preferred segments.

Deliverables: Memo of alternatives evaluation

Task 9: Detailed Design, Economic Analysis, and Toll System Operational Analysis
(Optional) Subtask 9a: Detailed Design

The preferred design(s) will be advanced to 10% design. The project team will develop 10% design of up to 2 leading scenarios and define the associated programmatic elements.

Subtask 9b: Economic and Toll System Operational Analysis

Further refinement of the economic and operation analysis from Task 8 will develop managed lane program alternatives to support the evaluation and next phases of design. This analysis will identify ongoing operational costs and potential for net revenue/ cost recovery. The analysis will include creating a planning level operation analysis, including operational variations and benefits and constraints of each, guidance on pricing structure, affordability, and transportation option improvements, and sketch level implementation, operational cost, and revenue assumptions. The analysis will outline the operations of the corridor including, but not limited to, payment collection, enforcement, and planning level cost estimates to build and operate the program. The cost analysis will also consider how revenues for the program could be used to fund the programmatic elements of the preferred managed lane program.

Subtask Task 9C: Funding and Implementation Plan

Building off of the sketch level implementation, operational cost, and revenue assumptions developed in this task, the project team will identify potential funding sources and define next steps for implementation. The implementation plan will also include an institutional analysis of governance options for any recommended designs.

Deliverables: (optional) detailed design, draft and final economic and operations analysis, Funding and Implementation Plan

Task 10: Outreach

Project outreach will take place in multiple phases and will develop a co-creation approach with the working group to allow the community to have a significant role in selecting the ultimate recommendation for a managed lane program. All outreach will be conducted in multiple languages and will include in person outreach events.

The first round of outreach would include surveys and in-person events to establish goals, evaluation metrics, and needs and challenges for travel on freeways within/through San Francisco.

The second round of outreach would focus on the corridor design and pricing strategies. In this second round, model results around congestion and affordability would be shared with the public to have informed discussions about benefits and tradeoffs. The ultimate goals of round two would be to gain insights to determine preferred pricing and roadway design elements to guide revisions to concepts and initial planning for related transportation programs, which would be brought to the third round of outreach.

The third round of outreach would bring forward revised design and pricing concepts that reflect findings from the previous round of outreach and program scenarios to complement scenarios. The outreach round would focus on defining various programs, including relative level of importance between programmatic elements (e.g. TDM, transit service, etc.).

The outreach process may also include a statistically significant survey effort to understand preferences, concerns, and support for a managed lanes program, representing all supervisorial districts in San Francisco.

Deliverables: Draft and final outreach materials, draft and final outreach report

Task 11: Final Deliverables

A draft and final report will be prepared and brought to the Transportation Authority Board for approval. The plan will document alternatives and final recommendations and include next steps to advance the recommended segments into the next stages of design and program development.

Deliverables: Draft and final plan, presentation and memorandums for board presentations

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

San Francisco County Transportation Authority

Project Name and Sponsor			
Project Name:	SF Freeway Network Management Placeholder		
Implementing Agency:	TBD		
Prop L Expenditure Plan Information			
Prop L Program:	22- Managed Lanes and Express Bus		
Project Information			
Brief Project Description for MyStreetSF (80 words max):	This is a placeholder to fund projects identified through the SF Freeways Network Management Study, which will include managed lane alternatives, including priced lane and priced facility options, for freeways within San Francisco (Central Freeway, I-80, US 101, I-280) with the goals of reducing vehicle miles traveled and increasing person throughput. Prop L funds could potentially fund components of the planning study or other implementation activities identified in the course of the study.		
Project Location and Limits:	San Francisco Freeways (i.e., Central Freeway, I-80, US 101, I-280)		
Supervisorial District(s):	TBD		
Is the project located on the 2022 Vision Zero High Injury Network ?	TBD	**Is the project located in an Equity Priority Community (EPC)?**	TBD
Which EPC(s) is the project located in?	TBD		
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)	This is a placeholder to fund projects identified through the SF Freeways Network Management Study, which will include managed lane alternatives, including priced lane and priced facility options, for freeways within San Francisco (Central Freeway, I-80, US 101, I-280). Prop L funds could potentially fund components of the planning study or other implementation activities identified in the course of the study.		
Attachments: Please attach maps, drawings, photos of current conditions, etc. to support understanding of the project.			
Type of Environmental Clearance Required:	TBD		
Coordinating Agencies: Please list partner agencies and identify a staff contact at each agency.	TBD		

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

San Francisco County Transportation Authority

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

This is a placeholder for projects or other follow on efforts to be identified in the SF Freeways Network Management Study. When specific projects are identified and prepared to seek Prop L funds, the project sponsor will provide project delivery milestones for all relevant project phases.

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

San Francisco County Transportation Authority

Project Name:	SF Freeway Network Management Placeholder

Project Cost Estimate		**Funding Source**		
Phase	**Cost**	**Prop L**	**Other**	**Source of Cost Estimate**
Planning/Conceptual Engineering	$ 750,000	$ 750,000	$ -	Placeholder local match funds
Environmental Studies (PA&ED)	$ -		$ -	
Right of Way	$ -	$ -	$ -	
Design Engineering (PS&E)	$ -	$ -	$ -	
Construction	$ -		$ -	
Operations (i.e. paratransit)	$ -	$ -	$ -	
Total Project Cost	$ 750,000	$ 750,000	$ -	
Percent of Total		**100%**	**0%**	

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**	**Cash Flow Total**
Prop L	22- Managed Lanes and Express Bus	TBD	Planned	2025/26	$ 750,000			$ 375,000	$ 375,000		$ 750,000
				Total By Fiscal Year	**$ 750,000**	**$ -**	**$ -**	**$ 375,000**	**$ 375,000**	**$ -**	**$ 750,000**

Notes

This is a placeholder. Once a project or project(s) is identified, the project(s) will be evaluated including looking at leveraging of Prop L funds.

Prop L Supplemental Information Please fill out each question listed below (rows 2-8) for all projects.	
Project Name	*SF Freeway Network Management Placeholder*
Relative Level of Need or Urgency (time sensitive)	
Prior Community Engagement/Level and Diversity of Community Support (may attach Word document):	
Benefits to Disadvantaged Populations and Equity Priority Communities	
Compatability with Land Use, Design Standards, and Planned Growth	
San Francisco Transportation Plan Alignment (SFTP)	
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.	
22- Managed Lanes and Express Bus	
Safety	
Improves Reliability	