

# 2019 Prop K Strategic Plan and 5-Year Prioritization Programs Update

## Board Agenda Item 14



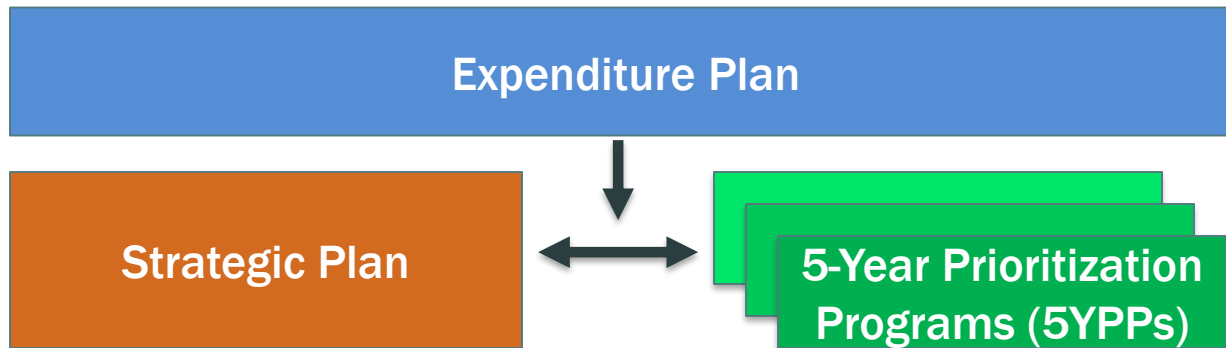
**SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY**

**April 10, 2018**

# 2019 Prop K Strategic Plan/5YPP Update Presentation Overview



## ► Overview of Prop K:



- Why is the Strategic Plan & 5YPP Update important?
- What is the process to update the Strategic Plan and 5YPPs?
- What is the schedule?
- What is the outreach strategy?



# Proposition K (Prop K)

## What is it?



- ▶ **Approved by nearly 75% of San Francisco voters in 2003**
- ▶ **Extended ½ cent local transportation sales tax**
- ▶ **Approved a new 30-year Expenditure Plan, superseding Prop B (prior sales tax)**
  - ▶ **Developed through first (2003) countywide transportation plan**
  - ▶ **\$2.35 billion in sales tax funds to deliver \$12.9 billion (2003 \$'s) in transportation improvements**
  - ▶ **Includes specific projects (e.g. Central Subway) and 21 programmatic categories (e.g. traffic calming)**



# Prop K Expenditure Plan

## What does it do?



- ▶ Determines eligibility for Prop K funds – specific projects (e.g. Central Subway) and programs (e.g. traffic calming)
- ▶ Allows for financing to accelerate project delivery
- ▶ Sets caps for maximum amount of Prop K funds available to each category over 30 years
- ▶ Identifies eligible project sponsors
- ▶ Establishes other requirements (e.g. Strategic Plan, 5YPPs)



# Prop K Expenditure Plan

## 4 Major Categories of Projects



### Streets & Traffic Safety 24.6%

- Bicycle and Pedestrian
- Street Resurfacing
- Signals and Signs
- Major Capital Projects

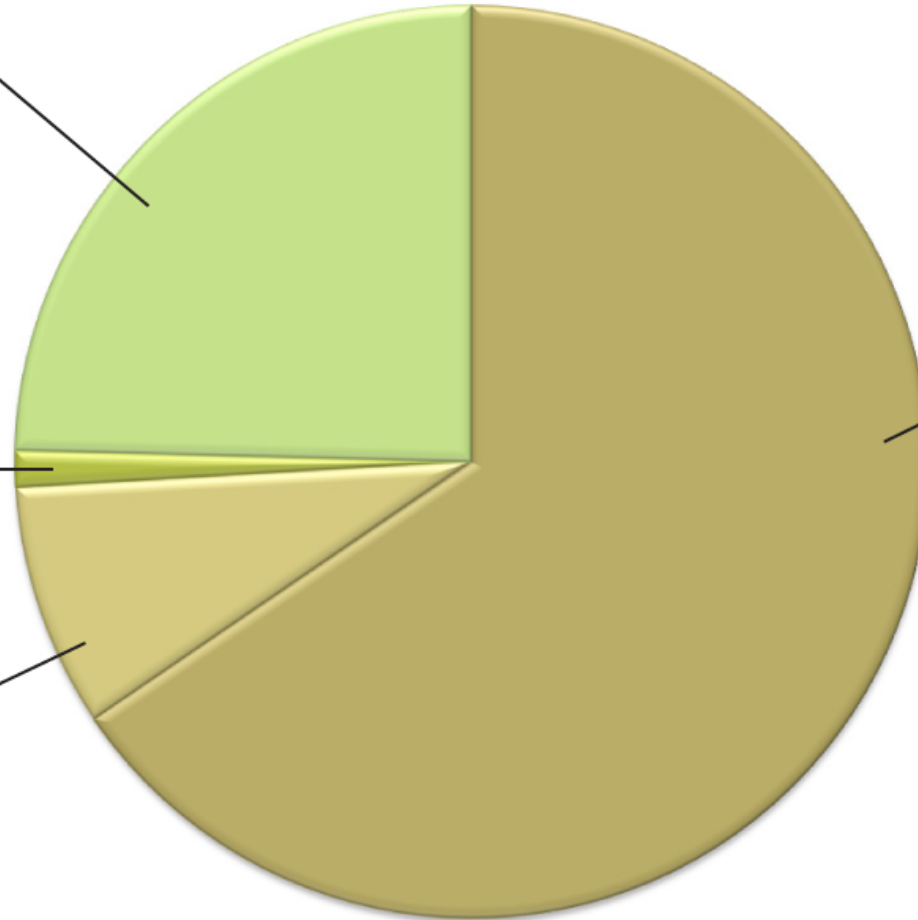
### Strategic Initiatives 1.3%

- Parking Management
- Transportation / Land Use Coordination

### Paratransit 8.6%

### Transit 65.5%

- MUNI
- BART
- Caltrain
- Ferries

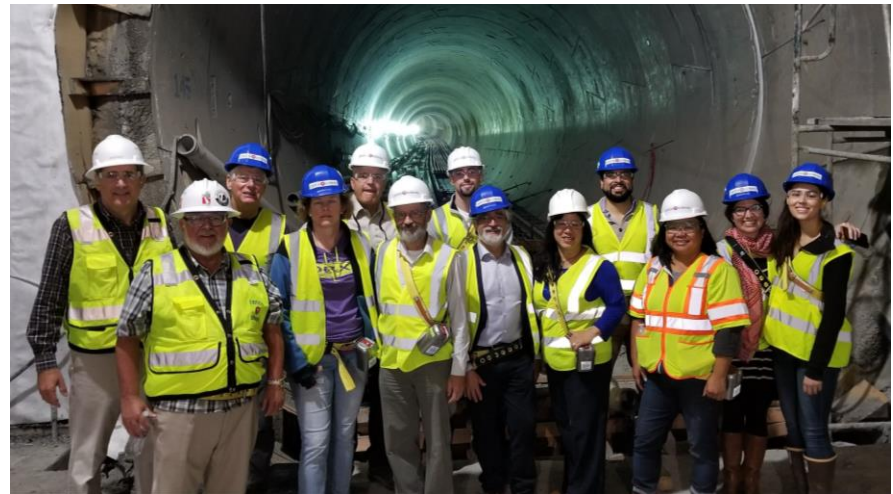


# Prop K Strategic Plan

## What is it?



- ▶ **Primary tool that guides the implementation of the 30-year Expenditure Plan**
- ▶ **Specifically, the Strategic Plan:**
  - ▶ Establishes policies for administration of program
  - ▶ Forecasts sales tax revenue over 30 years
  - ▶ Assigns Prop K funds to categories by fiscal year
  - ▶ Forecasts expenditures by fiscal year
  - ▶ Estimates financing needs





# Prop K 5YPPs

## What is the purpose?



- ▶ **Establish 5-year program (or list) of projects**
  - ▶ Supports comprehensive funding strategy
- ▶ **Provide transparency for how projects are prioritized**
- ▶ **Encourage coordination across programs and sponsors**
- ▶ **Provide opportunities for public and Board input early in the project development process**



# Prop K 5YPPs Required for 21 Programmatic Categories



- BRT/TPS/MUNI Metro Network \*
- Caltrain Capital Improvement Program
- BART Station Access, Safety, Capacity
- Ferry
- Transit Enhancements
- Vehicles
- Facilities
- Guideways
- New and Upgraded Streets
- New Signals and Signs
- SFgo: Advanced Tech and Info Systems
- Signals and Signs Maintenance and Renovation
- Street Resurfacing, Rehab and Maintenance
- Pedestrian and Bicycle Facility Maintenance
- Traffic Calming
- Bicycle Circulation/Safety
- Pedestrian Circulation/Safety
- Curb Ramps
- Tree Planting and Maintenance
- Transportation Demand/Parking Management
- Transportation/Land Use Coordination

\*BRT stands for Bus Rapid Transit. TPS stands for transit preferential streets.



# Prop K 5YPPs Designated Elements



- ▶ **Each 5YPP includes:**
  - ▶ **Prioritization methodology**
  - ▶ **5-year program (or list) of projects with funding and cash flow by fiscal year**
  - ▶ **Project Information Forms with scope, schedule, cost, and funding**
  - ▶ **Performance measures**
  - ▶ **Project delivery status**



# 2019 Strategic Plan/5YPP Update

## Why is it important? Why now?



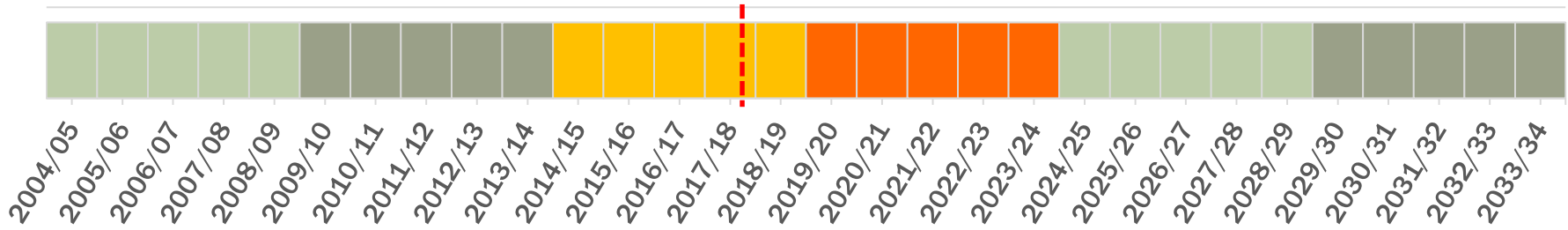
- ▶ **Determines which projects will receive funding over next five years**
- ▶ **Respond to current context**
  - ▶ Board interests, agency priorities, changing funding landscape
- ▶ **Helps ensure funds are available to support project delivery**
- ▶ **Support transparency and accountability**
  - ▶ Board, sponsor, public engagement
- ▶ **Needed now to program funds for 5-year period starting July 1, 2019**

30-Year Prop K  
Expenditure Plan

2009 SP/5YPP  
Update

2014 SP/5YPP  
Update

2019 SP/5YPP  
Update



Current 5-Year Period

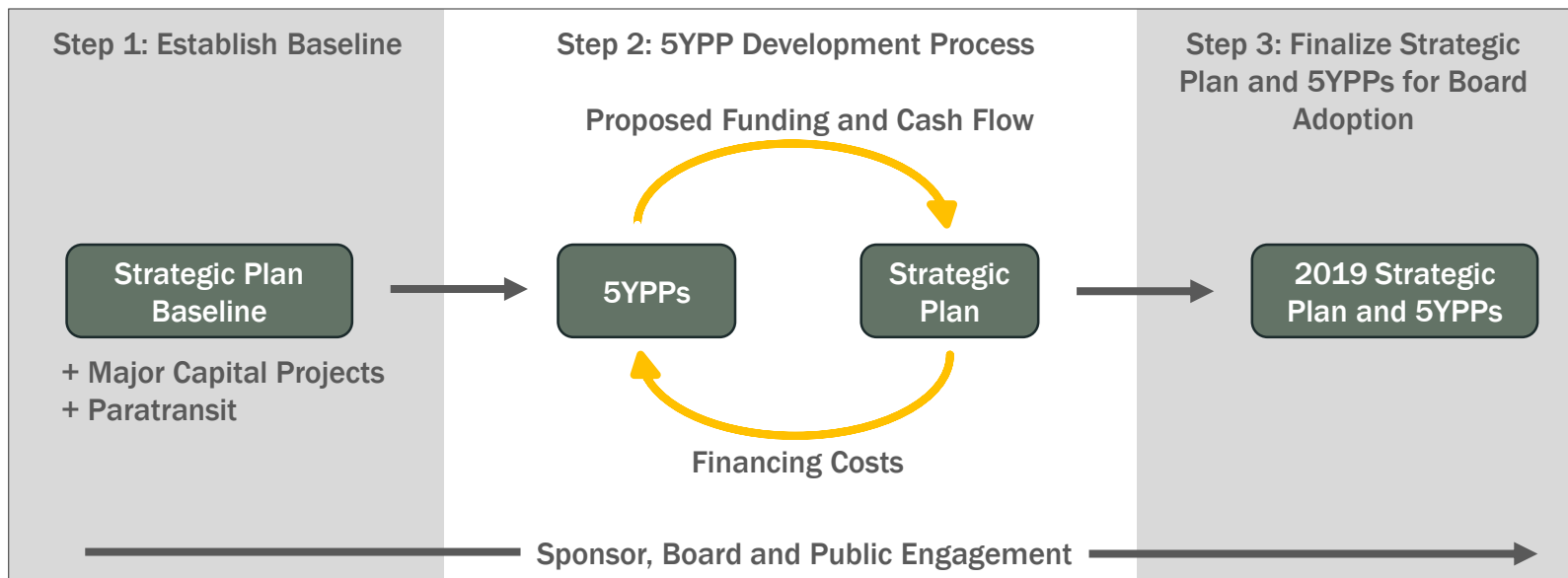
2019 SP/5YPP Update

# 2019 Strategic Plan/5YPP Update

## What is the process?



- ▶ Iterative process requiring extensive communication between SFCTA and project sponsors
- ▶ Strategic Plan and 5YPPs evolve in parallel and are closely coordinated



# 2019 Strategic Plan/5YPP Update

## Step 1: Establish Strategic Plan Baseline



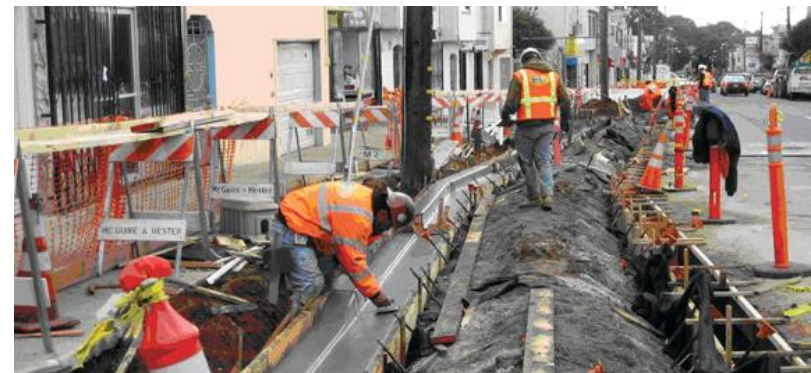
- ▶ For each Expenditure Plan category, Strategic Plan Baseline determines how much Prop K is available by fiscal year through 2034
- ▶ True-up to incorporate actual revenues and expenditures including financing costs since 2014 Strategic Plan update
- ▶ Update revenue projections and debt assumptions
- ▶ Update future funding and cash flow for Major Capital Projects and Paratransit (5YPPs are not required)
- ▶ Review and update Prop K policies
- ▶ Board adopts Strategic Plan Baseline

# 2019 Strategic Plan/5YPP Update

## Step 2: 5YPP Development Process



- ▶ **Transportation Authority issues 5YPP guidance**
- ▶ **Lead agency, with eligible sponsors and SFCTA, develop prioritization criteria, proposed program (or list) of projects, performance measures**
- ▶ **SFCTA prepares 5YPP project delivery status based on Portal grants reporting**
- ▶ **All collaborate to conduct outreach**



# 2019 Strategic Plan/5YPP Update

## Step 3: Finalize for Board Adoption



- ▶ **Assess 5YPPs as a whole to:**
  - ▶ **Ensure Board and public input addressed appropriately**
  - ▶ **Coordinate across categories**
  - ▶ **Establish financing needs and costs by category with Strategic Plan**
- ▶ **Refine as needed**
- ▶ **Transportation Authority Board adopts 5YPPs and final Strategic Plan**





# 2019 Strategic Plan/5YPP Update Proposed Schedule



Board adopts Strategic Plan/5YPP Update Approach

## Step 1: Establish Strategic Plan Baseline

Revenue and Debt Projections

Update Prop K Policies

Major Capital Projects and Paratransit

True-up Actual Revenues and Expenditures

Board Adoption of Strategic Plan Baseline

## Step 2: 5YPP Development Process

SFCTA Releases 5YPP Guidance

SFCTA and Sponsors prepare Prioritization Criteria

Sponsors prepare Project Information Forms (PIFs),  
Program of Projects and Scoring Tables

SFCTA Reviews PIFs, Program of Projects and Scoring Tables

## Step 3: Finalize Strategic Plan and 5YPPs for Board Adoption

Assess 5YPPs as a whole, establish financing needs, finalize draft 5YPP documents

Board Adopts 5YPPs Part 1

Board Adopts 5YPPs Part 2 and Final Strategic Plan

Sponsor, Board and Public Engagement



# 2019 Strategic Plan/5YPP Update Outreach Approach



- ▶ **Main audiences: the Board, the public, project sponsors**
- ▶ **Opportunity to identify and provide input on projects that will get Prop K funds over the 5-year period starting July 1, 2019**
- ▶ **Now through December 2018**
- ▶ **Three rounds or phases**
- ▶ **Proposed menu of strategies to engage target audiences**



# 2019 Strategic Plan/5YPP Update Opportunities and Other Considerations



- ▶ **Neighborhood Transportation Improvement Program (NTIP)**
- ▶ **School area traffic calming**
- ▶ **Vision Zero**
- ▶ **Caltrain Downtown Extension**
- ▶ **Senate Bill 1 project pipelines**
- ▶ **Geographic equity**



# Questions?

Anna LaForte  
Deputy Director for Policy & Programming  
415-522-4805, [anna.laforte@sfcta.org](mailto:anna.laforte@sfcta.org)



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