

NEW TRANSPORTATION EXPENDITURE PLAN FOR SAN FRANCISCO

Recommended July xx, 2003

San Francisco County Transportation Authority

1. INTRODUCTION

A. SUMMARY

The New Expenditure Plan identifies transportation improvements to be funded from the extension of the existing half-cent transportation sales tax. The projects and programs included in the Expenditure Plan are designed to be implemented over the next 30 years. Provisions are also made for future updates to the New Expenditure Plan beyond the initial 30-year period. The New Expenditure Plan includes investments in four major categories: Transit, Streets and Roads (including street resurfacing, and bicycle and pedestrian improvements), Paratransit services for seniors and disabled people, and Transportation System Management/Strategic Initiatives, to fund neighborhood parking management, land use coordination, and beautification efforts.

The major capital projects to be funded by the New Expenditure Plan are:

- Development of the Bus Rapid Transit/ MUNI Metro Network;
- Construction of the MUNI Central Subway (3rd St. LRT Phase 2);
- Construction of the Caltrain Downtown Extension to a Rebuilt Transbay Terminal;
- Replacement of the South Access to the Golden Gate Bridge (Doyle Drive).

B. CONTEXT

The New Expenditure Plan for the use of Prop X funds was developed by the Expenditure Plan Advisory Committee (EPAC), appointed by the San Francisco County Transportation Authority (Authority) Board, with technical assistance provided by the Authority and other transportation agencies. The roster of EPAC members is provided in Attachment 1. The Expenditure Plan was recommended by the Authority Board on July x, 2003.

By providing the required local match, Prop X is intended to leverage about \$9.6 billion in federal, state, and other local funding for transportation projects in San Francisco.

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

The Countywide Transportation Plan is the City's blueprint to guide the development of transportation funding priorities and policy. The major objectives of the Countywide Transportation Plan are to enhance mobility and accessibility throughout

the city, improve safety for all transportation system users, support the city's economic development and the vitality of our neighborhoods, sustain environmental quality, and promote equity and efficiency in transportation investments. The Countywide Transportation Plan is a living document, updated on a regular basis to identify and address changing needs and regional trends, and align them with available funding.

C. GOALS

The purpose of the New Expenditure Plan is to implement the priorities of the Countywide Transportation Plan through investment in a set of projects and programs that include planning, maintenance and rehabilitation of, and improvements to the city's multi-modal transportation system. Goals of the plan include:

- Maintain the city's transportation infrastructure in a state of good repair.
- Support an efficient, accessible, and fully integrated public transportation system that connects San Francisco's neighborhoods and links San Francisco to the region.
- Improve the speed, reliability, and ridership of transit in San Francisco and the region.
- Maintain a safe, attractive, well designed street network that provides mobility and public open space for residents and visitors.
- Enhance mobility for all San Franciscans, including seniors and people with disabilities.
- Maintain and enhance the city's roadway network to facilitate the safe movement of people and goods, including transit.
- Improve safety and amenities for pedestrians and bicyclists.
- Coordinate transportation investments with existing and planned land uses, to enhance livability and mobility, reduce traffic, and increase housing opportunities.
- Promote economic vitality citywide.
- Protect and enhance the environment.
- Improve coordination between transportation agencies and departments.
- Develop clear, equitable, and cost-effective methods for prioritizing transportation investments.
- Wisely use local funding to secure state, federal, and regional matching funds for transportation projects.

D. STRUCTURE

The New Expenditure Plan is organized into five sections. Section 1: Introduction provides background on the Plan's goals and development. Section 2: General Provisions provides further context on the Plan's policies and administration. Section 3: Plan Summary provides the Plan's investment detail by category. Section 4: Description of Projects and Programs contains detailed descriptions of the projects and programs (by category and subcategory), and the types of items that are eligible for

funding under each of them. Section 5: Implementation Provisions describes the process for prioritizing and allocating funds following adoption of the Plan. Section 6: Allocation and Reallocation of Funds, deals with the procedures to be followed in allocating and reallocating funds to the different levels of priority. Section 7: Update Process, deals with the mechanisms for developing updates beyond the initial 30-year period.

The Authority recommends that the following elements be included in the New Transportation Expenditure Plan for San Francisco.

2. GENERAL PROVISIONS

A. SALES TAX REVENUES

The New Expenditure Plan shall supersede the Proposition B Expenditure Plan, adopted in 1989, as of the operative date of the New Expenditure Plan, pursuant to Section 131105 of the California Public Utilities Code. The existing one-half percent local sales tax dedicated to transportation improvements (approved in November 1989 as Proposition B) shall be continued for the duration of the New Expenditure Plan.

Revenues are estimated under three scenarios over the 30-year period of the New Expenditure Plan. The conservative projection puts the total revenue level at \$2.35 billion (2003 dollars). The medium growth projection forecasts \$2.62 billion; and the optimistic projection is \$2.82 billion. These scenarios reflect average growth rates that vary from 1.4% per year to 1.65% to 2.15%. All three rates are based on historical trends in sales tax receipts in San Francisco, and are consistent with the projections used by the City and County of San Francisco and by the Metropolitan Transportation Commission.

B. RESTRICTION OF FUNDS

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

i. NO SUBSTITUTION

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

ii. INCREMENTAL OPERATING AND MAINTENANCE COSTS

Funds for operations and maintenance shall be limited exclusively to incremental costs associated with the operation of new transportation services and/or facilities, as specified in this plan. Regional operators and other non-San Francisco sponsors shall not be eligible for incremental operations and maintenance funding. Incremental costs shall be defined as solely those

operating and maintenance costs that would clearly not have otherwise been incurred absent the new service or facility. The intent shall under no circumstance be to provide an ongoing subsidy, but rather to allow for a limited level of transitional funding, to help the department responsible for the operation and maintenance of the new facility or service built or purchased with sales tax funds, to identify alternative funding sources for these purposes and gradually and fully absorb the facility's incremental operating and/or maintenance costs into its own operating budget. Incremental operating and maintenance costs shall be reimbursable from the sales tax according to the following schedule.

a. Linear Decrease

The funding eligibility level for incremental operating and maintenance costs shall decrease linearly from 100% on the first year of operation to 0% on year 10.

b. Grandfathered Projects

Projects currently receiving Prop B reimbursement for incremental operating and maintenance costs shall be eligible for reimbursement under the sales tax according to the same schedule as detailed in section 2.B.ii.a., above, starting with the amount shown in the 2003 Strategic Plan Update for Prop B for fiscal year 2003/04.

iii. NO EXPENDITURES OUTSIDE SAN FRANCISCO

No sales tax funds shall be spent outside the limits of the City and County of San Francisco, except for cases that satisfy all of the following conditions, and subject to a possible need for amendment of state legislation:

a. Quantifiable Benefit

The project, service, or programmatic category is included in the Expenditure Plan, and planning or other studies, developed in order to enable its implementation, demonstrate that there will be a quantifiable benefit to the City and County's transportation program from the expenditure of funds beyond the City and County line. A quantifiable benefit is defined as a measurable increase in the cost effectiveness of a project or group of transportation projects and or services at least partially funded with sales tax funds, located along the corridor or in the immediate geographic area of the City and County where the project in question is proposed to occur.

b. Expenses Matched By Other Counties

The proposed expense is matched by funding from the county where the expenditure of sales tax funds is proposed to be made.

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

IV. FUNDING CAPS FOR GRANDFATHERED PROJECTS

Projects grandfathered from the Prop B Expenditure Plan, shall be eligible to receive Prop X Priority 1 funds from the appropriate equivalent subcategories,

not to exceed the unallocated amounts programmed in the 2003 Prop B Strategic Plan Update. This section does not apply to incremental operating and maintenance costs, which are addressed separately in section ii.b., above.

C. SUCCESSOR PROGRAM

Upon approval of the Ordinance by the voters, the New Expenditure Plan shall supersede and become the successor program to the Expenditure Plan enacted in 1989 by the passage of the Proposition B local sales tax for transportation. As such it will bear responsibility for any outstanding debt incurred by the Proposition B program, and all assets of the Proposition B program shall become Prop X program assets.

D. BONDING AUTHORITY

The Authority shall be authorized to issue, from time to time, limited tax bonds in a total outstanding aggregate amount not to exceed \$1.88 billion, payable from the sales tax revenues generated pursuant to this plan. The Authority's bonding capacity shall be separate and distinct from that of the City and County of San Francisco.

E. ADMINISTRATION BY THE SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY

The San Francisco County Transportation Authority, which currently allocates, administers and oversees the expenditure of the existing Prop B sales tax for transportation, shall allocate, administer and oversee the expenditure of the Prop X sales tax funds.

F. SUPPORT OF ADJACENT COUNTIES

It is deemed unnecessary to seek the support of adjacent counties by requesting them to develop their own Transportation Expenditure Plans because:

- San Mateo, Alameda and Contra Costa Counties have already adopted Transportation Expenditure Plans; and
- Marin County is currently evaluating Transportation Expenditure Plans

G. ENVIRONMENTAL REVIEW

Environmental reporting, review and approval procedures as provided for under the National Environmental Policy Act (NEPA), and/or the California Environmental Quality Act (CEQA), and other applicable laws shall be carried out as a prerequisite to the implementation of any project to be funded partially or entirely with sales tax funds.

3. PLAN SUMMARY

Table 1 summarizes the half-cent sales tax revenue allocations by project category and subcategory in constant 2003 dollars. The New Expenditure Plan is fiscally constrained to the total funding expected to be available for each category. The financial constraint is further detailed within each category through the specification of funding priority levels (Priorities 1, 2 and 3). There are four categories, identified with capital letters (A through D). The first subdivision level under each category is known as a subcategory. Subcategories are indicated with lower case Roman numerals. The level below a subcategory is known as a program or a project.

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

Table 1: San Francisco Expenditure Plan Summary

SF Expenditure Plan Summary (DRAFT)		Total	Total	% of			
2003 \$Millions		Expected	Prop X⁵	Prop X			
		Funding¹		Funding²			
A. TRANSIT		9,944.3	1,781.1	65.5%			
I.	Major Capital Projects	3,748.7	689.6				
a.	MUNI	1,402.0	361.0				
	Bus Rapid Transit/MUNI Metro Network	600.0	110.0				
	3rd Street Light Rail (Phase 1)	100.0	70.0				
	Central Subway (3rd St. LRT Phase 2)	647.0	126.0				
	Geary LRT	55.0	55.0				
b.	Caltrain	2,141.0	313.1				
	Downtown Extension to a Rebuilt Transbay Terminal	1,885.0	270.0				
	Electrification	182.5	20.5				
	Capital Improvement Program	73.5	22.6				
c.	BART Station Access, Safety and Capacity	100.0	10.5				
d.	Ferry	105.7	5.0				
ii.	Transit Enhancements	200.7	52.5				
iii.	System Maintenance and Renovation	5,994.9	1,039.0				
a.	Vehicles	3,486.0	575.0				
b.	Facilities	945.7	115.7				
c.	Guideways	1,563.2	348.3				
B. PARATRANSIT³		396.3	291.0	8.6%			
C. STREETS AND TRAFFIC SAFETY		2,033.0	714.7	24.6%			
I.	Major Capital Projects	539.7	117.5				
a.	Golden Gate Bridge South Access (Doyle Drive)	420.0	90.0				
b.	New and Upgraded Streets	119.7	27.5				
ii.	System Operations, Efficiency and Safety	155.5	60.6				
a.	New Signals and Signs	55.5	41.0				
b.	Advanced Technology and Information Systems (SFgo)	100.0	19.6				
iii.	System Maintenance and Renovation	887.5	281.6				
a.	Signals and Signs	170.5	99.8				
b.	Street Resurfacing, Rehabilitation, and Maintenance	680.2	162.7				
c.	Pedestrian and Bicycle Facility Maintenance	36.8	19.1				
iv.	Bicycle and Pedestrian Improvements	450.3	255.0				
a.	Traffic Calming	142.0	70.0				
b.	Bicycle Circulation/Safety	77.6	56.0				
c.	Pedestrian Circulation/Safety	69.7	52.0				
d.	Curb Ramps	66.0	36.0				
e.	Tree Planting and Maintenance	95.0	41.0				
D. TRANSPORTATION SYSTEM MANAGEMENT/STRATEGIC INITIATIVES		62.5	33.2	1.3%			
I.	Transportation Demand Management/Parking Management	28.9	13.2				
ii.	Transportation/Land Use Coordination	33.6	20.0				
Total		12,436	2,820	100%			
Total Prop X Priority 1 (conservative forecast)				2,350			
Total Prop X Priority 1 + 2 (medium forecast; most likely to materialize)				2,626			
Total Prop X Priority 1+2+3 (optimistic forecast) ⁴				2,820			

Geneva Avenue, Bayshore Blvd, 16th Street, San Bruno Ave., Stockton, and the MUNI rail lines. Includes additional BRT and TPS improvements subject to availability of funds. TPS improvements are intended to improve speed and reliability at cost lower than BRT. TPS improvements include sidewalk bulb-outs at bus stops, transit-priority lanes, traffic signal modifications, and relocation of bus stops.

BRT and TPS projects may include traffic signal modification to speed up service, and real-time passenger information systems improve transit reliability and reinforce the sense of permanence of the improved service, as well as associated landscaping, lighting and signage improvements. It is the intent that buses that operate along BRT corridors should be able to also operate along TPS corridors. Funds in this section may be used to create dedicated stations and exclusive transit lanes for the MUNI light rail and historic streetcar lines. Includes planning, project development, capital and incremental operating and maintenance costs. Sponsoring Agencies: MUNI, DPT, DPW, Planning, SFCTA. The first \$99.2M is Priority 1 and the remainder is Priority 2. Total Funding: \$600M; Prop X: \$110.0M.

- 3rd Street Light Rail (Phase 1):

This is a grandfathered project. Complete construction of trackway, related facilities, and the Metro East light rail maintenance facility and yard, and purchase of new light rail vehicles (LRVs), including additional LRVs for expanded Mission Bay service. (Priority 1). Includes capital and incremental operating and maintenance costs. Sponsoring Agency: MUNI. Total Funding: \$100M; Prop X: \$70M.

- New Central Subway (3rd St. LRT Phase 2):

This is a grandfathered project. Design and construction of the second phase of the 3rd Street Light Rail line as a subway linking the Caltrain Depot at 4th and King Streets and Pac Bell Park to Moscone Center, the BART/MUNI Metro stations on Market Street, Union Square and Chinatown. Includes preliminary and detailed engineering and construction costs. (Priority 1). Includes project development, capital and incremental operating and maintenance costs. Sponsoring Agency: MUNI. Total Funding: \$647M; Prop X: \$126M.

- Geary Light Rail:

This funding is for environmental studies, preliminary and detailed engineering for implementing light rail transit on Geary Blvd (Priority 3). Total Funding: \$55M; Prop X: \$55M.

b. Caltrain

- Downtown Extension to a Rebuilt Transbay Terminal:

Construction of a grade-separated extension of Caltrain to a rebuilt Transbay Terminal at the current site (Mission and 1st Streets) near BART and MUNI Metro. The extension and terminal are to be built as a single, integrated project. If the Caltrain Downtown Extension portion of the project is cancelled, this project shall not be eligible for

any funds from the sales tax program. (Priority 1). Includes project development and capital costs. Sponsoring Agency: TJPA. The first \$237.7M is Priority 1 and the remainder is Priority 2. Total Funding: \$1,885M; Prop X: \$270M.

- **Electrification:**

Convert Caltrain service, line, and locomotives from diesel-powered to electric-powered. The project includes all stationary systems, substations, and signal system modifications, along with new rolling stock and supporting infrastructure and facilities. Costs reflect San Francisco share only. (Priority 1). Includes project development and capital costs. Sponsoring Agency: PCJPB. Total Funding: \$182.5M; Prop X: \$20.5M.

- **Capital Improvement Program:**

Provides San Francisco's local match contribution for Caltrain's Capital Improvement Program (CIP) projects, including continued implementation of express tracks between San Francisco and San Jose to improve travel time and reliability. This work may include passing sidings, to allow express trains to bypass local service where additional tracks are not appropriate and/or right of way is limited. Maintenance and rehabilitation projects designed to improve service levels. Costs reflect San Francisco share only. Includes project development and capital costs. Sponsoring Agency: PCJPB. The first \$19.9M is Priority 1 and the remainder is Priority 2. Total Funding: \$73.5M; Prop X: \$22.6M.

c. BART Station Access, Safety and Capacity

Improvements to stations and other facilities owned or operated by BART within San Francisco to enhance passenger safety, accessibility and capacity, (e.g. additional staircases), improved signage and security, real-time traveler information, intermodal access improvements (including improved access for passengers transferring from other transit services or bicycles), and street level plaza improvements. Improvements to station or system capacity, including additional staircases, elevators, and escalators, shall be eligible for funding in this category if the Authority finds that the costs of the station and system capacity improvements are shared equitably among the counties BART serves. Includes project development and capital costs. Sponsoring Agency: BART, MUNI, DPT, DPW. The first \$9.2M is Priority 1 and the remainder is Priority 2. Total Funding: \$100M; Prop X: \$10.5M.

d. Ferry

Improvements to downtown ferry terminals to accommodate increases in ferry ridership. Included are additional intermodal connections, new ferry berths, improved emergency response systems, and landside improvements to serve increased passenger flows. Also included is rehabilitation of passenger-serving facilities. Includes project development and capital costs. Sponsoring Agencies: Port of San Francisco, GGBHTD. The first \$4.4M is Priority 1 and the remainder is Priority 2. Total Funding: \$105.7M; Prop X: \$5M.

ii. TRANSIT ENHANCEMENTS

Programmatic improvements that promote system connectivity and accessibility, close service gaps, and improve and expand transit service levels. For Transit Enhancements, the first \$43.0M is Priority 1, the second \$4.5M is Priority 2 and the remaining \$5.0M is Priority 3. Projects include:

- Extension of existing trolleybus lines and electrification of motor coach routes. Includes purchase of additional trolley buses for new service. Includes project development and capital costs. Sponsoring Agency: MUNI. Total Funding: \$47.7M; Prop X: \$9.5M.
- Extension of historic streetcar service from Fisherman's Wharf to Fort Mason. Total Funding reflects Prop X funds only; the remaining project costs will be covered by the National Park Service/Presidio Trust using Park funds. Includes project development and capital costs. Sponsoring Agency: MUNI. Total Funding: \$5 M; Prop X: \$5 M.
- Purchase and rehabilitation of historic light rail vehicles for new or expanded service. Includes project development, capital, and incremental operating and maintenance costs. Sponsoring Agency: MUNI. Total Funding: \$7.2 M; Prop X: \$1.4 M.
- Balboa Park BART/MUNI station access improvements to enhance BART, bus and MUNI light rail transit connections. Includes project development and capital costs. Sponsoring Agencies: MUNI, BART, DPT, DPW. Total Funding: \$34.5M; Prop X: \$9.72M.
- Relocation of the Caltrain Paul Avenue station to Oakdale Avenue. Includes project development and capital costs. Sponsoring Agencies: PCJPB, DPT, DPW. Total Funding: \$26.43M; Prop X: \$7.93M.
- Purchase of additional light rail vehicles to expand service and reduce overcrowding on existing MUNI Light Rail lines. Includes project development, capital, and incremental operating and maintenance costs. Sponsoring Agency: MUNI. Total Funding: \$28.9M; Prop X: \$5.8M.
- Other transit enhancements to be prioritized by the Authority. Includes planning, project development and capital costs. Sponsoring Agencies: MUNI, BART, PCJPB. Total Funding: \$50.96 M; Prop X: \$14.0 M.

iii. SYSTEM MAINTENANCE AND RENOVATION

a. Vehicles

Programmatic improvements for upgrade, rehabilitation and replacement of transit vehicles, spare parts and on-board equipment. Includes limited incremental operating funds for F-line historic streetcar operations. The first \$506.3M is Priority 1 and the remainder is Priority 2. Projects include:

- Rail car, trolley coach and motor coach renovation and replacement; retrofit of diesel coaches to reduce emissions. Includes project development and capital costs. Sponsoring Agencies: MUNI, BART, PCJPB. Funding for BART rail car renovation and replacement shall be eligible for funding under this subcategory if the Authority finds that the costs of rail car renovation and replacement are shared equitably

among the counties BART serves. The first \$486 M in Prop X is Priority 1, and the remainder is Priority 2. Total Funding: \$3,476.7 M; Prop X: \$566 M. Of the \$565.7 M in Prop X funds, the following minimum amounts will be available for MUNI (\$450.75M), BART (\$11.5M), and PCJPB (\$23M).

- Trolleybus wheelchair-lift incremental operations and maintenance. This is a grandfathered project. Provides for incremental operating and maintenance costs according to the schedule described in 2.b.ii.B. The first \$2.62M is Priority 1 and the remainder is Priority 2. Sponsoring Agency: MUNI. Total Funding: \$3.05M, Prop X: \$3.05M.
- F-Line Historic Streetcar Incremental Operations and Maintenance: This is a grandfathered project. Provides for incremental operating and maintenance costs according to the schedule described in Section 2.b.ii.B of this Expenditure Plan. The first \$5.3 M in Prop X is Priority 1 and the remainder is Priority 2. Sponsoring Agency: MUNI. Total Funding: \$6.2M; Prop X: \$6.2M

b. Facilities

Programmatic improvements for upgrade, rehabilitation and replacement of transit facilities and facilities-related equipment. Includes limited incremental operating funds for MUNI Metro Extension/MUNI Metro Turnback operations. The first \$101.9M is Priority 1 and the remainder is Priority 2. Projects include:

- Rehabilitation, upgrades and/or replacement of existing facilities for maintenance and operations, including equipment (Priority 1). Rehabilitation, upgrades and renovation for rail stations including platform edge tiles, elevators, escalators, and faregates (Priority 1). Rehabilitation and/or replacement of facilities for administration (Priority 2). The first \$84.7 M in Prop X is Priority 1 and the remainder is Priority 2. Includes project development and capital costs. Sponsoring Agencies: MUNI, BART, PCJPB. Total Funding: \$925.7M; Prop X: \$95.7M. Of the \$115.7M in Prop X funds, the following minimum amounts will be available for MUNI (\$92.6M), BART (\$2.3M), and PCJPB (\$9.3M).
- MUNI Metro Extension (MMX) incremental operations and maintenance. This is a grandfathered project. Provides for incremental operating and maintenance costs according to the schedule described in 2.b.ii.B. The first \$17.2 M is Priority 1 and the remainder is Priority 2. Sponsoring Agency: MUNI. Total Funding: \$20 M, Prop X: \$20 M.

c. Guideways

Rehabilitation, upgrades and/or replacement of rail, overhead trolley wires, signals, and automatic train control systems. The intent is to implement TPS standards whenever rehabilitation, upgrade or replacement projects of light rail lines are undertaken. Seismic retrofit and improvements to emergency lighting and ventilation. (PRIORITY 1). The first \$306.7 M is Priority 1 and the remainder is Priority 2. Total Funding: \$1,563.2M; Prop X: \$348.3M. Includes project development and capital costs. Sponsoring

Agencies: MUNI, BART, PCJPB. The following minimum amounts will be available for MUNI (\$278.6M), BART (\$7M), and PCJPB (\$27.9M).

B. PARATRANSIT

Continued support for paratransit door-to-door van and taxi services for seniors and people with disabilities who are unable to use fixed route transit service. Includes operations support, phased replacement of accessible vans, and replacement and upgrades of supporting equipment such as debit card systems. Sponsoring Agency: MUNI. The first \$201.9M is Priority 1. The next \$24.1M is Priority 2, and the remainder is Priority 3. Total Funding: \$396.3M; Prop X: \$291M.

C. STREETS AND TRAFFIC SAFETY

i. MAJOR CAPITAL PROJECTS

a. Golden Gate Bridge South Access (Doyle Drive)

Construction of a replacement project for the existing facility to improve earthquake and traffic safety. Project includes direct vehicular and transit access into the Presidio National Park, improved bicycle and pedestrian connections, a transit transfer center and bus rapid transit treatments, and connections to Marina Boulevard and Richardson Avenue. (Priority 1). Includes project development and capital costs and may include associated environmental restoration. Sponsoring Agencies: SFCTA, Caltrans. The first \$79.2 M is Priority 1 and the remainder is Priority 2. Total Funding: \$420M; Prop X: \$90M.

b. New and Upgraded Streets

Upgrading and extension of streets and other vehicular facilities to bring them up to current standards; addition of Transit Preferential Streets (TPS) treatments to transit corridors and construction of major bicycle and pedestrian facilities. The first \$24.2 M is Priority 1; and the remainder is Priority 2. Total Funding: \$119.7 M; Prop X: \$27.5 M

- Bernal Heights Street System Upgrading (Priority 1). This is a grandfathered project. Construction of streets in Bernal Heights where existing streets are unimproved or below city standards to ensure adequate emergency vehicle response times. Includes project development and capital costs. Sponsoring Agency: DPW. Total Funding: \$1.415M; Prop X: \$1.415M.
- Great Highway Erosion Repair, including bicycle path development. (Priority 1) Includes project development and capital costs. Sponsoring Agency: DPW. Total Funding: \$15.0M; Prop X: \$2.03M.
- Visitacion Valley Watershed: San Francisco share of San Francisco/San Mateo Bi-County Study projects such as the extension of Geneva Avenue across US 101 to improve multi-modal access, including a possible light rail extension to Candlestick Point, or other transportation improvements as identified or refined through a community planning process. (Priority 1). Includes planning, project development and capital costs. Sponsoring Agencies: DPW, MUNI, SFCTA, PCJPB, Caltrans. Total Funding: \$46.3M; Prop X: \$15M.

- A new Illinois Street Bridge including multimodal (vehicle, rail, bicycle, and pedestrian) access across Islais Creek (Priority 1). Includes project development and capital costs. Sponsoring Agency: Port of San Francisco. Total Funding: \$15.0M; Prop X: \$2.0M.
- A study to identify ways to reduce the traffic impacts of State Route 1 on Golden Gate Park (Priority 1). Includes planning and project development costs. Sponsoring Agency: DPT, Caltrans. Total Funding: \$2M; Prop X: \$0.2M
- Other upgrades to major arterials such as 19th Avenue, to complement traffic calming on adjacent neighborhood streets, including pedestrian and bicycle safety improvements, intersection reconfiguration, transit preferential improvements and landscaping. Includes planning, project development and capital costs. Sponsoring agencies: DPW, DPT, MUNI, Caltrans, SFCTA. Total Funding: \$40M; Prop X: \$6.9M.

ii. SYSTEM OPERATIONS, EFFICIENCY AND SAFETY

a. New Signals and Signs

Programmatic improvements including new traffic signs and signals (including pedestrian and bicycle signals) implementation of transit priority systems on select corridors; and new pavement markings such as raised flashing pavement reflectors and transit lane markings (Priority 1). Installation of red light photo enforcement equipment; electronic parking meters including meters that accept credit or pre-paid debit cards; and relocation of traffic maintenance shop to a new location (Priority 2). Includes project development and capital costs. Sponsoring Agency: DPT; MUNI. The first \$36.1M is Priority 1 and the remainder is Priority 2. Total Funding: \$55.5M; Prop X: \$41.0M.

b. Advanced Technology and Information Systems (SFgo)

Programmatic improvements using advanced technology and information systems to better manage roadway operations for transit, traffic, cyclists, and pedestrians. Includes interconnect and traffic signal controller technology and related communications systems to enable transit and emergency vehicle priority; dissemination of real time information to transit passengers; and management of vehicular flows and signalization to enhance bicycle and pedestrian safety (Priority 1). Closed circuit TV and communications systems (e.g. Variable Message Signs) for incident and special event traffic management as well as responsive/adaptive signal control and traveler information (Priority 2). Includes project development and capital costs. Sponsoring Agency: DPT, MUNI. The first \$17.3M is Priority 1 and the remainder is Priority 2. Total Funding: \$100.0M; Prop X: \$19.6M.

iii. SYSTEM MAINTENANCE AND RENOVATION

a. Signals and Signs

Programmatic improvements including maintenance and upgrade of traffic signs and signals. Signal maintenance includes new mast arms, LED signals, conduits, wiring, pedestrian signals, left turn signals. Includes transit pre-empts and bicycle route signs and signals. Maintenance and

upgrades of traffic striping and channelization to improve safety. Includes maintenance and replacement of red light enforcement cameras. Includes project development and capital costs. Sponsoring Agency: DPT. The first \$87.9M is Priority 1 and the remainder is Priority 2. Total Funding: \$170.5M; Prop X: \$99.8M.

b. Street Resurfacing, Rehabilitation, and Maintenance

▪ Street Resurfacing and Reconstruction:

Repaving and reconstruction of city streets to prevent deterioration of the roadway system, based on an industry-standard pavement management system designed to inform cost effective roadway maintenance. Includes project development and capital costs. May include sidewalk rehabilitation, curb ramps and landscaping, subject to approved prioritization plan. Sponsoring Agency: DPW. The first \$118.3 M in Prop X is Priority 1 and the remainder is Priority 2. Total Funding: \$641.3M; Prop X: \$134.3M.

▪ Street Repair and Cleaning Equipment

Replacement of street repair and cleaning equipment according to industry-standards, such as but not limited to, asphalt pavers, dump trucks, sweepers, and front-end loaders. Includes capital costs only. Sponsoring Agency: DPW. The first \$22.8M in Prop X is Priority 1 and the remainder is Priority 2. Total Funding: \$36.4M; Prop X: \$25.9M.

▪ Embarcadero Roadway Incremental Operations and Maintenance

This is a grandfathered project. Provides for incremental operating and maintenance costs according to the schedule described in 2.b.ii.B. Funding shall only be made available after reimbursement of \$2.5 M from the City and County of San Francisco to the Authority for repayment of a capital loan authorized by Authority resolution No. 97-44. Sponsoring Agency: DPW. The first \$2.2 M is Priority 1 and the remainder is Priority 2. Total Funding: \$2.5 M; Prop X: \$2.5 M.

c. Pedestrian and Bicycle Facility Maintenance

Public sidewalk repair and reconstruction citywide. Additional pedestrian facility improvements including stairways, retaining walls, guardrails and rockfall barriers. Upgrades of substandard bicycle lanes; rehabilitation of bicycle paths, and reconstruction of MUNI passenger boarding islands. Includes project development and capital costs. Sponsoring Agencies: DPT, DPW, MUNI. The first \$17.4M is Priority 1 and the remainder is Priority 2. Total Funding: \$36.8M; Prop X: \$19.1M.

iv. BICYCLE AND PEDESTRIAN IMPROVEMENTS

a. Traffic Calming

Programmatic improvements to neighborhood streets to make them more livable and safe to use for all users – pedestrians, cyclists, transit, and autos. Includes strategies to reduce auto traffic speeds and improve pedestrian and bicyclist safety and circulation such as: improvements to bicycle and walking routes (e.g. sidewalk widening, streetscape upgrades including

landscaping), speed humps, corner bulb-outs, chicanes and channelization (Priority 1). New or improved pedestrian safety measures such as ladder crosswalks and pedestrian signals (Priority 1). Development of neighborhood and school area safety plans citywide, including above-mentioned strategies and complementary outreach and education programs (Priority 1). New traffic circles, signals and signage including flashing beacons and vehicle speed radar signs (Priority 2). The first \$60.8M is Priority 1. The next \$7.2M is Priority 2 and the remainder is Priority 3. Includes planning, project development and capital costs. Sponsoring Agencies: DPT, DPW. Total Funding: \$142.0M; Prop X: \$70.0M.

b. Bicycle Circulation/Safety

Programmatic improvements to the transportation system to enhance its usability and safety for bicycles. Infrastructure improvements on the citywide bicycle network, such as new bike lanes and paths. Bicycle parking facilities such as bike racks and lockers. Support for bicycle outreach and education programs. Improvements must be consistent with the city's bicycle plan. The first \$27.6M is Priority 1. The next \$2.4M is Priority 2 and the remainder is Priority 3. Includes project development and capital costs. Sponsoring Agencies: DPT, DPW, BART, PCJPB. Total Funding: \$77.6; Prop X: \$56.0M.

c. Pedestrian Circulation/Safety

Programmatic improvements to the safety and usability of city streets for pedestrians, prioritized as identified in the Pedestrian Master Plan. Includes flashing pavement reflectors on crosswalks, pedestrian islands in the medians of major thoroughfares, sidewalk bulb-outs, sidewalk widenings, and improved pedestrian circulation around BART and Caltrain stations. Includes project development and capital costs. Sponsoring Agencies: DPT, MUNI, DPW, BART, PCJPB. The first \$23.8M is Priority 1. The next \$1.2M is Priority 2 and the remainder is Priority 3. Total Funding: \$69.7M; Prop X: \$52.0M.

d. Curb Ramps

Construction of new wheelchair curb ramps and related roadway work to permit ease of movement for the mobility impaired. Reconstruction of existing ramps. Includes project development and capital costs. Sponsoring Agency: DPW, MUNI. The first \$23.6M is Priority 1. The next \$2.4M is Priority 2 and the remainder is Priority 3. Total Funding: \$66.0M; Prop X: \$36.0M.

e. Tree Planting and Maintenance

Planting of new street trees and maintenance of new and existing trees in public rights-of-way throughout the city. Sponsoring Agency: DPW. The first \$32.8M is Priority 1. The next \$4.2M is Priority 2 and the remainder is Priority 3. Total Funding: \$95.0M; Prop X: \$41.0M.

D. TRANSPORTATION SYSTEM MANAGEMENT/STRATEGIC INITIATIVES

i. TRANSPORTATION DEMAND MANAGEMENT/PARKING MANAGEMENT

Develop and support continued Transportation Demand Management (TDM) and parking requirements for downtown buildings, special event sites, and

schools and universities. Includes neighborhood parking management studies. Support related projects that can lead to reduction of single-occupant vehicle dependence and encourage alternative modes such as bicycling and walking, including Pedestrian Master Plan development and updates (Priority 1), citywide Bicycle Plan updates, and traffic circulation plans. Conduct transit service planning such as route restructuring studies to optimize connectivity with rapid bus network and major transit facilities (e.g. Transbay Terminal and Balboa Park BART station). Funds for studies and projects to improve access of disadvantaged populations to jobs and key services. Includes planning, project development and capital costs. Sponsoring Agencies: MUNI, DPT, Planning, SFCTA, DOE, DAS. The first \$11.6M is Priority 1 and the remainder is Priority 2. Total Funding: \$28.9M; Prop X: \$13.2M.

ii. TRANSPORTATION/LAND USE COORDINATION

Transportation studies and planning to support transit oriented development and neighborhood transportation planning. Local match for San Francisco and regional Transportation for Livable Communities (TLC)/Housing Incentive Program (HIP) grant programs that support transit oriented development and fund related improvements for transit, bicyclists, and pedestrians including streetscape beautification improvements such as landscaping, lighting and street furniture. Includes planning, project development and capital costs. Sponsoring Agencies: DPT, DPW, MUNI, Planning, SFCTA, BART, PCJPB. The first \$17.6M is Priority 1 and the remainder is Priority 2. Total Funding: \$33.6M; Prop X: \$20.0M.

5. IMPLEMENTATION PROVISIONS

A. PROGRAMMATIC CATEGORIES - DEFINITION

This Expenditure Plan identifies eligible expenditures for specific transportation projects as well as for programmatic categories. Programmatic categories are set up to address allocation of funds to multi-year programs for a given purpose, such as the maintenance of traffic signals, for which not all specific project locations can be anticipated or identified at the time of adoption of the Expenditure Plan.

B. PRIORITIZATION PROCESS

For programmatic categories and for projects involving multiple agencies, subsequent to approval of the Expenditure Plan, the Authority Board shall designate a lead agency responsible for prioritizing the program of projects for the category, and for implementing the project(s).

Prior to allocation of any sales tax funds, the lead agency shall prepare, in close consultation with all other affected planning and implementation agencies and the Authority, a 5-year prioritized program of projects (for programmatic categories) including budget, scope and schedule; or a 5-year project delivery timetable, budget and scope (for individual projects) consistent with the Strategic Plan for use of the Prop X funds, for review and adoption by the Authority Board. Program goals shall be consistent with the Countywide Transportation Plan and with the City's General Plan.

The program of projects shall at a minimum address, the following factors:

- i. Project readiness, including schedule for completion of environmental and design phases; well-documented preliminary cost estimates, and documented community support as appropriate;
- ii. Compatibility with existing and planned land uses, and with adopted standards for urban design and for the provision of pedestrian amenities; and supportiveness of planned growth in transit-friendly housing, employment and services.
- iii. A prioritization mechanism to rank projects within the program, addressing, for each proposed project:
 - a. Relative level of need or urgency
 - b. Cost Effectiveness
 - c. A fair geographic distribution that takes into account the various needs of San Francisco's neighborhoods.
- iv. Funding plan, including sources other than Prop X

The lead agency shall conduct appropriate public outreach to ensure an inclusive planning process for the development of the program of projects, as well as general plan referral or referral to any City Department or Commission as required.

The lead agency shall also identify appropriate performance measures, such as increased system connectivity, increased transit ridership (net new riders), reductions in travel time for existing riders, and increased use of alternatives to the single-occupant automobile; as well as milestone targets and a timeline for achieving them, to ensure that progress is made in meeting the goals and objectives of the program.

These performance measures shall be developed in collaboration with the Authority, shall be consistent with Congestion Management Program requirements and guidelines issued by the Authority, and shall be submitted for review and approval by the Authority.

The lead agency shall be eligible for planning funds from this category for the purpose of completing the development of the program of projects. Lead agencies will also be encouraged to explore alternative and non-traditional methods for project and service delivery where they offer opportunities for increased cost-effectiveness and/or shortened project delivery timelines.

As part of the Strategic Plan development process, the Authority shall adopt, issue and update detailed guidelines for the development of programs of projects, including further detail on the definition and application of the concept of land use/housing-supportive transportation projects as referenced in 4.A.i. Transit-Major Capital Projects, as well as for the development of project scopes, schedules and budgets.

6.ALLOCATION AND RE-ALLOCATION OF FUNDS

Each New Expenditure Plan program or project (see definition in Section 3 above) shall be funded using sales tax revenue up to the total amount for that program or project in Priority 1. If, after funding all Priority 1 projects in a subcategory, the latest Prop X Strategic Plan Update cash flow analysis forecasts available revenues in excess of Priority 1 levels, the Authority Board may allow programming of Priority 2 revenues within the subcategory, subject to the category percentage caps and program or project dollar amount caps for Priority 2 established in the New Expenditure Plan. After

funding at least 80% of Priority 2 project dollar amounts, the Authority Board may program Priority 3 requests, if the latest Prop X Strategic Plan forecasts revenues beyond the total Priority 2 level.

In the case of Major Capital Projects, the lead agency shall submit to the Authority Board for approval a schedule of project delivery milestones required to ensure that Prop X funds allocated to the project are obligated in a timely manner. The project delivery milestones shall include the completion of environmental clearances, securing of necessary project funding, and the start of construction or implementation. The Authority staff shall prepare a report at least annually, to the Authority Board, to communicate the status of these projects. If a project has not achieved any given project milestone within a period of 5 years, the funds earmarked for the project shall be subject to re-programming by the Transportation Authority Board, by a 2/3 vote.

7.UPDATE PROCESS

Pursuant to the provisions of Division 12.5 of the California Public Utilities Code, the Authority Board may adopt an updated Expenditure Plan anytime after twenty years from the effective date of adoption of the New Expenditure Plan, but no later than the last general election in which the New Expenditure Plan is in effect. In order to develop and adopt an updated Expenditure Plan, the Authority Board shall appoint an Expenditure Plan Update Advisory Committee, to develop the updated Expenditure Plan. A recommendation for adoption of the updated Expenditure Plan shall require a 2/3 vote of the Authority Board.

The following abbreviations are used for Sponsoring Agencies:

BART	Bay Area Rapid Transit District
Caltrans	California Department of Transportation
DAS	Department of Administrative Services
DOE	Department of the Environment
DPT	Department of Parking and Traffic
DPW	Department of Public Works
MUNI	San Francisco Municipal Railway
PCJPB	Peninsula Corridor Joint Powers Board (Caltrain)
Planning	Planning Department
SFCTA	San Francisco County Transportation Authority
TJPA	Transbay Joint Powers Authority

Attachment 1: Expenditure Plan Advisory Committee Roster

Tom Radulovich, Chair	At-Large Member
Gwyneth Borden, Vice Chair	Business Advisory Group
Jim Bourgart	Business Advisory Group
Gabriel Metcalf	Business Advisory Group
Duane Papierniak	Business Advisory Group
Patricia Tolar	Business Advisory Group
Val Menotti	CAC Member
Jackie Sachs	CAC Member
Roger Peters	CAC Member
Wil Din	CAC Member
Art Michel	CAC Member
James Haas	At-Large Member
Jessie Lorenz	At-Large Member
Fran Martin	At-Large Member
Bruce M. Oka	At-Large Member
Luis Pardo	At-Large Member
Pi Ra	At-Large Member
Norman Rolfe	At-Large Member
Michael Smith	At-Large Member
Dave Snyder	At-Large Member
Andrew Sullivan	At-Large Member
Elizabeth Dunlap	CAC Alternate
Terry Micheau	CAC Alternate
Ben Tom	CAC Alternate
Michael Kiesling	At-Large Alternate
Dennis J. Oliver	At-Large Alternate
David Pilpel	At-Large Alternate
Brett Orlanski	At-Large Alternate