Transportation Authority Strategic Plan 2020-2024 Update

July 11, 2019
Board of Directors - Agenda Item #11b
Overview

• Purpose & Process

• Context: Trends, Peer Review Findings/Needs Analysis

• Plan Framework/Policy Development:
  - Project selection process
  - Eligible sponsors & match requirements
  - Program delivery/technical assistance
  - Evaluation criteria

• Outreach Update & Exercises

• Key SAG/TAG feedback
Strategic Plan Purpose & Requirements

• Provides policy framework for program implementation, including:
  - Evaluation criteria/prioritization for project selection
  - Processes to initiate projects

• One Strategic Plan for 2 Measures
  • Measure A requirement - Plan adoption & update at least once every 5 years
  • Measure W requirement - Plan adoption with broad based outreach
Measure A – Program Categories

- Transit - 30%
- Highways - 27.5%
- Local Streets & Transportation - 22.5%
- Grade Separations - 15%
- Pedestrian & Bicycle - 3%
- Alternative Congestion Relief - 1%
- Administration - 1%
Measure W – Program Categories

- Countywide Highway Cong. Impvts - 22.5%
- Local Safety, Pothole/ Cong. Relief Impvts - 12.5%
- Bicycle & Pedestrian Impvts - 5%
- Regional Transit Connections - 10%
- Public Transportation - 50%

50% for Grade Separations

2.5% for Grade Separations

10% to cities/ county by formula

22.5%

SamTrans administered

TA administered
## Development Process/Outreach Timeline

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>March</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>April</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>July</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>August</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oct</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Board Ad-hoc Committee

- March
- April
- May
- June
- July
- August
- Sept
- Oct
- Nov

### SAG + TAG

- March
- April
- May
- June
- July
- August
- Sept
- Oct
- Nov

### Board of Supervisors

- March
- April
- May
- June
- July
- August
- Sept
- Oct
- Nov

### Broad Community Engagement

- March
- April
- May
- June
- July
- August
- Sept
- Oct
- Nov

---

**Kick-off**

- March

**We are here**

**Adopt Final Plan**

- Nov
Growth Projections 2010-2040

- Robust growth expected
- San Mateo County growth is less than the region as a whole
- Employment growth will continue to outstrip housing supply growth, suggesting outside commuting will continue to grow

Source: ABAG Projections 2013 & State of California, Department of Finance
Peer Review Findings

• Most TA’s make long term commitments per their Expenditure Plans & lead implementation

• However, they have competitive calls for some programs but not to the extent of the SMCTA
  - SMCTA uses a Call for Projects process for flexibility

• Opportunities to leverage external funds are maximized when agency goals/strategies are aligned
  - SMCTA goals/principles align well with those in other regional transportation plans (Countywide Transportation Plan & One Bay Area)
Projected Revenue versus Projected Needs for Competitive Categories

- Project needs far exceed projected funding
- Other public/private sources will need to be leveraged in order to deliver projects

* Projected Revenue for life of Measure A and Measure W
** Unfunded Needs based on order of magnitude cost estimates from Get Us Moving (GUM) Project Needs less projected revenue
Comparing the Two Measures

**Measure A Program Categories**
- Highways (27.5%)
- Local Streets & Transportation (22.5%)
- Grade Separations (15%)
- Pedestrian & Bicycle (3%)
- Transit (30%)
  - Caltrain: 16%
  - Local Shuttles: 4%
  - Accessible Services: 4%
  - Ferry: 2%
  - Dumbarton Rail Corridor: 2%
  - BART within San Mateo County: 2%
- Alternative Congestion Relief (1%)

**Measure W Program Categories**
- Countywide Highway Congestion Improvements (22.5%)
- Local Investment Share (10%)
- Grade Separations (2.5%)
- Bicycle & Pedestrian (5%)
- Regional Transit Connections (10%)
- No similar Measure W category

**Comparability**

**Direct comparability**, except: 1) Measure A is more restrictive with distinct highway subcategories (Key Congested Areas and Supplemental Roadways) and 2) Measure W allows greater flexibility with pedestrian/bicycle components that are integrated with highway projects.

**Direct comparability**, If a city’s pavement is not in good condition, funding must be used on pavement repair until it reaches a Pavement Condition Index (PCI) of 70, which is considered good road condition.

**Direct comparability**

**Direct comparability**, except that non-capital expenditures are allowed under Measure W.

**Not directly comparable**, as focus in Measure W is limited to regional transit connections. Some relationship to Caltrain, Ferry, BART and SamTrans (Dumbarton Rail) sub-categories in Measure A.
<table>
<thead>
<tr>
<th>Measure A Program Categories</th>
<th>Measure W Program Categories</th>
<th>Staff Recommendations for Project Selection</th>
</tr>
</thead>
</table>
| Highways: 27.5%             | Countywide Highway Congestion: 22.5% | Measure A: continue Call for Projects w/ focus on Pipeline projects, small set-aside for Planning & PE/ENV work for new projects  
Measure W: Update existing Short Range Highway Plan, prepare a new Highway CIP to inform selection process |
| Local Streets & Transportation: 22.5% | Local Safety Pothole & Congestion Relief (Local share): 10% | Agreement based, funds are passed through directly to sponsors |
| Grade Separations: 15% | Local Safety Pothole & Congestion Relief (Grade Sep): 2.5% | Measure A: continue funding Pipeline projects, small set-aside for Planning to start new projects  
Measure W: for Pipeline projects or seed money for new road/rail grade separations |
| Ped & Bike - 3% | Bike & Ped: 5% | Continue Call for Projects, add new subcategories:  
i) capital: large & small, ii) planning/promotion & iii) Safe Routes to Schools |
| NA | Regional Transit Connections: 10% | Prepare Regional Transit Plan with a Transit CIP to inform selection process |
## Sponsorship for Measure A and Measure W Program Categories

<table>
<thead>
<tr>
<th>Program Categories</th>
<th>Eligible Sponsors¹</th>
<th>Program Categories</th>
<th>Eligible Sponsors²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highways: 27.5%</td>
<td>Caltrans, cities, County, C/CAG, TA for regional projects</td>
<td>Countywide Highways Congestion: 22.5%</td>
<td>Caltrans, cities, County, TA for regional serving projects, Express Lane JPA</td>
</tr>
<tr>
<td>Local Streets &amp; Transportation: 22.5%</td>
<td>Cities &amp; County</td>
<td>Local Safety Pothole &amp; Congestion Relief (Local share): 10%</td>
<td>Cities &amp; County</td>
</tr>
<tr>
<td>Grade Separations: 15%</td>
<td>SamTrans, JPB, cities &amp; County</td>
<td>Local Safety Pothole &amp; Congestion Relief (Grade Seps): 2.5%</td>
<td>SamTrans, JPB, cities &amp; County</td>
</tr>
<tr>
<td>Pedestrian/Bicycle: 3%</td>
<td>Cities &amp; County</td>
<td>Bicycle/Pedestrian: 5%</td>
<td>Cities, County, C/CAG, transit agencies, public schools (for SR2S)</td>
</tr>
<tr>
<td>NA</td>
<td>NA</td>
<td>Regional Transit Connections: 10%</td>
<td>Transit agencies (e.g. JPB, SamTrans, BART) for Ferry (WETA or host city)</td>
</tr>
</tbody>
</table>

### Notes:
1) Eligible Sponsors as defined by the voter approved Transportation Expenditure Plan or subsequently amended per Board action
2) The TA currently is an eligible co-sponsor for the San Mateo US 101 Express Lanes Project
**Proposed Minimum Match Requirements for Measure W Categories and Comparable Measure A Categories**

<table>
<thead>
<tr>
<th>Measure A Category</th>
<th>Minimum Funding Match</th>
<th>Measure W Category</th>
<th>Minimum Funding Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highways</td>
<td>10%</td>
<td>Countywide Highway Congestion</td>
<td>10%</td>
</tr>
<tr>
<td>Local Streets &amp; Transportation Share</td>
<td>none</td>
<td>Local Safety, Pothole &amp; Congestion Relief (Local Share)</td>
<td>none</td>
</tr>
<tr>
<td>Grade Separation</td>
<td>match expected but not specified</td>
<td>Local Safety, Pothole &amp; Congestion Relief (Grade Separations)</td>
<td>match expected but not specified</td>
</tr>
<tr>
<td>Pedestrian &amp; Bicycle</td>
<td>10%</td>
<td>Bicycle &amp; Pedestrian</td>
<td>capital: 10% planning/promotion, &amp; start-up operations: 50%, SR2S: none</td>
</tr>
<tr>
<td>No comparable category</td>
<td>NA</td>
<td>Regional Transit Connections</td>
<td>capital: 10% operations: 50%</td>
</tr>
</tbody>
</table>
TA’s Role in Project Delivery

• **Should TA be more proactive identifying & sponsoring highway projects of countywide significance?**
  - Local agency limitations:
    • Resource availability/technical expertise
    • Congestion often generated beyond city boundaries, regional approach needed
  - Greater benefits may be realized targeting projects that reduce regional congestion and also improve local mobility
  - Example regional projects:
    • US 101 (I-380 to SF County Line) Managed Lanes  • SR 92 Managed Lanes
    • US 101/SR 92 Interchange Direct Connector Project
    • New projects TBD via update of Short Range Highway Plan (SRHP)

• **If TA to sponsor regional projects, should it make long term commitments with Measure A & W funds?**
Should TA expand its role?

• Currently provides technical assistance to highway sponsors on request. Should it proactively offer assistance?

• Temporarily offer consultant services to fill sponsor gaps due to staff vacancies on request to keep projects moving

• Contract with consultants to procure grant funds to help sponsors better leverage Measure A & W as well as their own local funds
Project Evaluation Process
(Competitive Categories)

Criteria Development

Measure W Principles

Public Input

Ad-Hoc, TAG & SAG Input

Measure A Goals/Vision & Evaluation Criteria

Refine Evaluation Criteria

Strategic Plan

Selection Process

Projects Submitted

Projects Assessed on Evaluation Criteria

Evaluation Panel Review

Funding Recommendations
Extensive Public Outreach

• 4 Community Meetings (North, Mid, South County and Coast)
• Online Survey
  • Press Release, Social Media, Leverage SAG/TAG Networks, 4k GUM Survey Takers
• Pop Ups and Organizational Presentations
• Dedicated Portion of TA Website
• Fall outreach focused on draft Plan
Measure W Core Principles

Future projects in the 5 Measure W Program Categories “are to be implemented primarily with guidance from the Core Principles set forth below, as applicable.”

- Invest in repair and maintenance of existing infrastructure
- Maximize opportunities to leverage investment and service from public and private partners
- Prioritize environmentally-sustainable transportation solutions
- Incorporate the inclusion and implementation of policies that encourage safe accommodation of all people using the roads regardless of mode of travel
- Promote economic vitality and economic development
- Maximize traffic reduction potential associated with the creation of new housing opportunities in high-quality transit corridors
- Enhance safety and public health
- Incentivize transit, bicycle pedestrian, carpooling and other shared-ride options over driving alone
- Relieve traffic congestion countywide
- Facilitate the reduction of vehicle miles traveled, travel times and greenhouse gas emissions
- Invest in a financially sustainable public transportation system that increases ridership, provides quality transit options for everyone, and embraces innovation to create more transportation choices and improves travel experience
## SAG/TAG Exercise Results:

### Relative Importance of Measure W Core Principles

<table>
<thead>
<tr>
<th>Measure W Core Principles</th>
<th>Countywide Highway Congestion Projects (22.5%)</th>
<th>Local Investment Share (10%)</th>
<th>Grade Separations (2.5%)</th>
<th>Bicycle and Pedestrian Improvement (5%)</th>
<th>Regional Transit Connections (10%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relieve Traffic Congestion Countywide</td>
<td>30%</td>
<td>0%</td>
<td>15%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Financially-Sustainable Public Transportation System*</td>
<td>5%</td>
<td>0%</td>
<td>15%</td>
<td>5%</td>
<td>30%</td>
</tr>
<tr>
<td>Implement Environmentally-friendly Transportation Solutions, Green Stormwater Infr./Plan for Climate Change</td>
<td>5%</td>
<td>0%</td>
<td>0%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Promote Economic Vitality, Economic Development &amp; Creation of Quality Jobs</td>
<td>15%</td>
<td>0%</td>
<td>5%</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Maximize Opportunities to Leverage Investment from Public/Private Sources</td>
<td>5%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>10%</td>
</tr>
<tr>
<td>Enhance Safety and Public Health</td>
<td>15%</td>
<td>10%</td>
<td>55%</td>
<td>35%</td>
<td>5%</td>
</tr>
<tr>
<td>Invest in Repair &amp; Maintenance of Existing &amp; Future Infrastructure</td>
<td>0%</td>
<td>80%</td>
<td>0%</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Reduce VMT, Travel Times &amp; GHG Emissions</td>
<td>15%</td>
<td>0%</td>
<td>5%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Incorporate Complete Streets Policies/Strategies Accommodation of all People using Roads, Regardless of Mode</td>
<td>5%</td>
<td>10%</td>
<td>5%</td>
<td>25%</td>
<td>5%</td>
</tr>
<tr>
<td>Incentivize Transit, Bicycle, Pedestrian, Carpooling and Shared Ride Options over Driving Alone</td>
<td>5%</td>
<td>0%</td>
<td>0%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Maximize Traffic Reduction Associated with Creation of Housing in High Quality Transit Corridors</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>5%</td>
<td>10%</td>
</tr>
</tbody>
</table>

100%  100%  100%  100%  100%
Take Our Survey!

Countywide Highway Congestion Improvements

1. Please select up to six (6) Core Principles that you think are most applicable. *Minimum one (1) required*

- [ ] Relieve Traffic Congestion Countywide
- [ ] Invest in a Financially-sustainable Public Transportation System
- [ ] Implement Environmentally-friendly Transportation Solutions
- [ ] Promote Economic Vitality, Economic Development & Creation of Quality Jobs
- [ ] Maximize Opportunities to Leverage Investment from Public/Private Sources
- [ ] Enhance Safety & Public Health
- [ ] Invest in Repair & Maintain Existing & Future Infrastructure
- [ ] Facilitate the Reduction of Vehicle Miles Travelled, Travel Times and Greenhouse Gas Emissions
- [ ] Incorporate the Inclusion and Implementation of Complete Street Policies
- [ ] Incentivize Transit, Bicycle, Pedestrian, Carpooling and Shared Ride Options over Driving Alone
- [ ] Maximize Traffic Reduction Potential Associated with the Creation of New Housing Opportunities in High-Quality Transit Corridors
# Potential Evaluation Criteria to Address Measure W Principles - Highways

<table>
<thead>
<tr>
<th>Measure W Core Principles</th>
<th>Relevant Measure A Project Evaluation Criteria</th>
<th>Potential Additional Measure W Related Criteria (if needed)</th>
</tr>
</thead>
</table>
| Relieve Traffic Congestion Countywide | **NEED**  
- Current congestion  
- Projected congestion  
- Located in the State Highway Congestion & Safety Performance Assessment for San Mateo County  
**EFFECTIVENESS**  
- Ability to relieve congestion/performance improvement  
- Demonstrates coordination with adjacent projects/integration of inter-related projects  
- Regional significance |  
- Potential increase in person through-put |
| Facilitate the reduction of vehicle miles travelled, travel times and greenhouse gas emissions | **EFFECTIVENESS**  
- Ability to relieve congestion/performance improvement  
**SUSTAINABILITY**  
- Project is primarily an operational improvement rather than infrastructure expansion  
- Project accommodates multiple transportation modes where contextually appropriate and to the extent feasible (Complete Streets) |  
- Potential VMT reduction/capita  
- Potential travel time savings  
- Potential reduction in GHG emissions |
Key SAG and TAG takeaways

• Both Agree: Commonality between the measures, one selection process for comparable categories - but need to respect differences

• TAG:
  - Want clear and simple process/direction
  - Only apply Measure W Principles as applicable to the categories
  - Desire for countywide-level entity to lead multi-city highway projects

• SAG:
  - Variety of opinions on how Principles should apply
  - Want contemporary concepts from Measure W Principles to apply to comparable Measure A category criteria
Next Steps

• Wrap up discussion on Principles & Criteria Development: August
• Prepare Draft Plan: July - September
• Release Draft Plan: September
• Draft Plan to Board: October
• Final Plan for Board Action: November