



Image Credit: Caltrain

Senate Bill 125 Regional Funding Framework Adoption and Regional Accountability Measure Update



METROPOLITAN
TRANSPORTATION
COMMISSION

MTC Programming & Allocations Committee

November 13, 2024

Raleigh McCoy

Senate Bill 125 Background

- \$4 billion in Transit and Intercity Rail Capital Program (TIRCP)
 - Bay Area share expected to be \$770M
 - \$665M collectively dedicated to BART Core Capacity and BART to Silicon Valley Phase II, leveraging \$6 to \$8 billion in federal funds
- \$1.1 billion for new Zero Emission Transit Capital Program (ZETCP)
 - Bay Area share expected to be ~\$400M
- MTC to make remaining \$105M in TIRCP and all \$400M in ZETCP available for transit operations
- State funding supplemented by \$300M in regional funds to address standardized shortfall needs

Regional Contribution to Help Address Gap

- MTC estimates \$300M in **currently unprogrammed funds** could be redirected
- Redirection of funds will require significant trade-offs
- Final regional contribution depends on interest earned on SB 125 capital funds and continued state advocacy

| Fund Source | Amount (\$M) | % Share of Program | Typical Recipient | Typical Usage |
|---|--------------|--|--|---|
| Unprogrammed FTA Formula | \$132 | ~ 20% of annual funding | Transit Operators | Transit State of Good Repair |
| Surface Transportation Funding (STP/CMAQ) | \$93 | ~ 10% of four-year cycle | CTAs/Local Jurisdictions/ MTC/Project Sponsors | OBAG – Bike/Ped, Other County Priorities, Regional Programs |
| Bridge Tolls | \$49 | N/A – Escrowed + some annual RM3 Express Bus Funding | Express Bus and Ferry Operators | Operations Funding |
| State Transit Assistance (Population-Based) | \$25 | N/A – Program balances + some on-going funds. | MTC to support regional transit programs | Regional Programs (i.e., Clipper, Fare Programs) |
| Total | \$300 | | | |

Proposed Regional Funding Framework for FY25-26

- Regional funds assigned to operators based on eligibility requirements
- STP/CMAQ funds preserved where possible to minimize impact on local projects
- Operators confirmed feasibility of framework

Regional Funding Framework (\$M)

| Operator | Regional Funds | SB 125 Funds (Including Interest) | Total Funds |
|--------------------|----------------|-----------------------------------|--------------|
| AC Transit | \$33 | \$0 | \$33 |
| BART* | \$129 | \$223 | \$352 |
| Caltrain | \$15 | \$10 | \$25 |
| Golden Gate | \$20 | \$21 | \$41 |
| SFMTA | \$92 | \$217 | \$309 |
| Small Operators | \$11 | \$4 | \$14 |
| Grand Total | \$300 | \$474 | \$774 |

* Regional funding for BART includes \$60 million in CMAQ funds that would be programmed to BART Core Capacity, enabling \$60 million in SB 125 capital funds committed to that project to shift to support FY2025-26 operating needs.

Regional Accountability Measures

MTC Resolution No. 4619, Revised adopted the following accountability measures that operators must advance in exchange for SB 125 funds

| Regional Accountability Measure Type | Assigned Operator(s) |
|---------------------------------------|---------------------------------|
| Participation in Regional Initiatives | All |
| Schedule Coordination | All |
| GTFS Best Practices | All |
| Ambassador Programs | BART, SFMTA |
| Crisis Prevention Program | Caltrain |
| Efforts to Curtail Fare Evasion | BART, SFMTA |
| Service Optimization | AC Transit, Golden Gate Transit |

Regional Accountability Measure Process

Operators
Provide Initial
Update Through
Annual Claim
Workbook

- Occurs on rolling basis over fiscal year
- Most operators submit in summer 2024

MTC Reviews
Progress Prior to
Allocating SB
125 Funds

- Synopsis for operators claiming operating funds that month attached to PAC summary sheet
- If satisfactory progress is not made, MTC to impose remedies and/or temporarily withhold SB 125 funds

Operators
Provide Mid-Year
Update in Early
2025

- Summary of mid-year progress will be provided to PAC

AC Transit Update

LEGEND

- ⋯ *Maintain Current Performance*
- ⋯ *In-Progress - Satisfactory*
- ✗ *In-Progress - Unsatisfactory*

| Status | Initiative | Summary |
|---------------------------------------|-----------------------|--|
| ⋯ | Regional Initiatives | <ul style="list-style-type: none"> Currently participating in all applicable initiatives Co-manages several regional initiatives |
| ⋯ | Schedule Coordination | <ul style="list-style-type: none"> Next Milestone: AC Transit should prioritize shifting to the common operator schedule in the upcoming 2025 labor negotiation |
| ⋯ | GTFS Data | <ul style="list-style-type: none"> AC Transit has implemented most basic best practices Next Milestone: AC Transit should make technical revisions identified by 511 staff |
| ⋯ | Service Optimization | <ul style="list-style-type: none"> Realign Final Network Plan approved October 2024 Next Milestone: AC Transit should share findings from the service planning process to inform similar efforts at peer agencies |

Program Highlight Transit 2050+ Co-Management

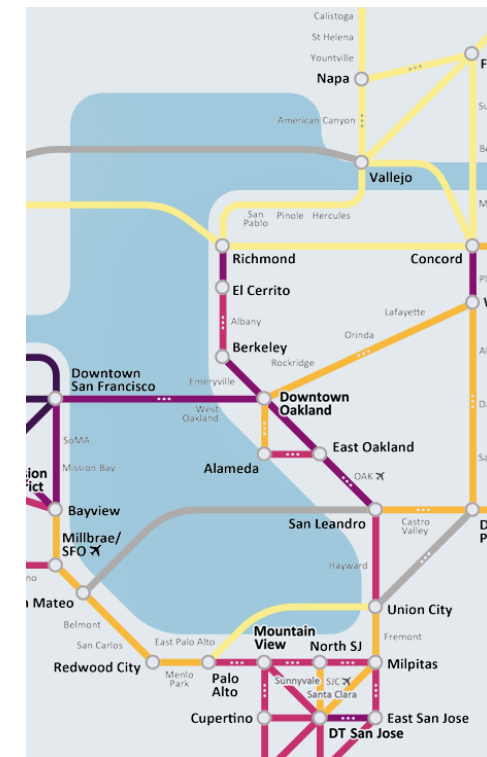







Image Credit: MTC

BART Update

LEGEND

-  *Maintain Current Performance*
-  *In-Progress - Satisfactory*
-  *In-Progress - Unsatisfactory*

| Status | Initiative | Summary |
|---|-----------------------|---|
|  | Regional Initiatives | <ul style="list-style-type: none"> Currently participating in all applicable initiatives Co-manages several regional initiatives |
|  | Schedule Coordination | <ul style="list-style-type: none"> Aligned with the common sign-up schedule BART coordinates with connecting agencies on schedule changes |
|  | GTFS Data | <ul style="list-style-type: none"> BART has implemented some basic best practices Next Milestone: BART should make technical revisions per 511 |
|  | Fare Gates | <ul style="list-style-type: none"> New fare gates have been installed at 8 stations Next Milestone: BART should expedite installation, work toward a full funding plan for the project, and update MTC on fare collection trends |
|  | Ambassador Program | <ul style="list-style-type: none"> Currently has ~30 ambassadors and crisis intervention specialists Next Milestone: BART should continue to monitor effectiveness and implement improvements as necessary |

Program Highlight New Fare Gates







Image Credit: BART

Caltrain Update

LEGEND

-  *Maintain Current Performance*
-  *In-Progress - Satisfactory*
-  *In-Progress - Unsatisfactory*

| Status | Initiative | Summary |
|---|---------------------------|---|
|  | Regional Initiatives | <ul style="list-style-type: none"> Currently participating in all applicable initiatives |
|  | Schedule Coordination | <ul style="list-style-type: none"> Next Milestone: Caltrain should implement schedule changes on the common schedule (excluding changes related to introduction of electrified service) |
|  | GTFS Data | <ul style="list-style-type: none"> Caltrain has implemented all applicable basic best practices Next Milestone: Caltrain should make technical revisions per 511 |
|  | Crisis Prevention Program | <ul style="list-style-type: none"> Suicide prevention tactics include barriers, signs, and coordination Next Milestone: Caltrain should evaluate the effectiveness of their Crisis Prevention Program and identify improvement opportunities |

Program Highlight Crisis Prevention Program







Image Credit: KRON4

Golden Gate Transit Update

LEGEND

-  *Maintain Current Performance*
-  *In-Progress - Satisfactory*
-  *In-Progress - Unsatisfactory*

| Status | Initiative | Summary |
|---|-----------------------|---|
|  | Regional Initiatives | <ul style="list-style-type: none"> Currently participating in all applicable initiatives Closely involved in mapping & wayfinding pilot preparation |
|  | Schedule Coordination | <ul style="list-style-type: none"> Aligned with the common sign-up schedule Next Milestone: Golden Gate Transit should leverage coordination through the MASCOTS to improve inter-operator transfer experience |
|  | GTFS Data | <ul style="list-style-type: none"> Golden Gate has implemented some basic best practices Next Milestone: Golden Gate Transit should make technical revisions per 511 |
|  | Service Optimization | <ul style="list-style-type: none"> Executives from transit agencies and MTC started meeting in January Next Milestone: Golden Gate Transit should continue to coordinate on topics such as public outreach, zero-emission transition, and coordinated transit planning |

Program Highlight MASCOTS Optimization Study








Image Credit: Marin Independent Journal

SFMTA Update

LEGEND

-  *Maintain Current Performance*
-  *In-Progress - Satisfactory*
-  *In-Progress - Unsatisfactory*

| Status | Initiative | Summary |
|---|-----------------------|---|
|  | Regional Initiatives | <ul style="list-style-type: none"> Currently participating in all applicable initiatives Partner on Powell St. Station mapping & wayfinding prototype |
|  | Schedule Coordination | <ul style="list-style-type: none"> SFMTA aligns operator sign-ups with BART (on common schedule) Next Milestone: SFMTA should continue to coordinate on transfers |
|  | GTFS Data | <ul style="list-style-type: none"> SFMTA has implemented most basic best practices Next Milestone: SFMTA should develop a plan to meet all best practices |
|  | Fare Collection | <ul style="list-style-type: none"> SFMTA has hired more fare inspectors and is studying fare evasion Next Milestone: SFMTA should share findings from their fare evasion study, including proposals to reduce fare evasion |
|  | Ambassador Program | <ul style="list-style-type: none"> SFMTA hired more ambassadors and collected data on safety Next Milestone: SFMTA should provide an update on Safety Equity Action Plan rollout and hiring of additional ambassadors |

Program Highlight Mapping & Wayfinding Pilot



Image Credit: MTC

Next Steps

Funding

- FY24-25 SB 125 operating funds were allocated to BART and ACE in October
- FY24-25 SB 125 operating allocation to SFMTA proposed for November
- Staff will return to PAC for approval of programming of regional funds in December
- ***Today's recommended action:*** Refer MTC Resolution No. 4619, Revised to the Commission for approval of the \$300 million regional funding framework

Regional Accountability Measures

- Operators to continue submitting progress updates on rolling basis
- PAC to receive monthly updates upon MTC's receipt of claims
- Staff will prepare a mid-year SB 125 regional accountability measure progress update for early 2025
- MTC staff will continue to support advancement of initiatives and bring updates to committees such as RNM