

2024 LOCAL PARTNERSHIP PROGRAM (COMPETITIVE AND FORMULAIC)

GUIDELINES DEVELOPMENT WORKSHOP #2



(Rescheduled) March 11, 2024

WELCOME AND INTRODUCTIONS



LOCAL PARTNERSHIP PROGRAM TEAM



MATTHEW YOSGOTT

Deputy Director
SB 1 Programming



LEISHARA WARD

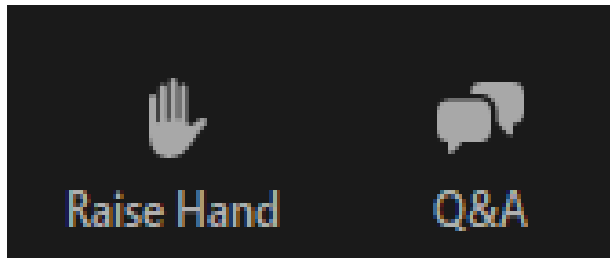
Associate Deputy Director
Local Partnership Program



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Program Analyst
Local Partnership Program

ZOOM MEETING LOGISTICS



- **Comments and Questions are encouraged**
- Please use the raise hand feature early
- Please use the Q&A tab to submit your comment/question
- The Chat feature has been disabled
- Clearly state your name and organization at the start of your comment
- Do not share your workshop registration link/phone number



AGENDA REVIEW



LOCAL PARTNERSHIP PROGRAM GUIDELINES WORKSHOP AGENDA

- Workshop #1 Recap
 - Program Objective and Eligibility
 - Proposed 2024 Program Timeline
 - Discussion Workshop Format and Structure
 - Summary of Attendees and Key Topics Discussed
 - Comments Received and Action Items
- Key Discussion Topics LPP Formulaic
 - Guidelines Language Clarification
 - Technical Updates
- Key Discussion Topics LPP Competitive
 - Maximum Award of \$25M – Should it be adjusted up or down?
 - Expanding what “System Preservation” means
 - Guidelines Language Clarification
- Office Hours
- Key Discussion Topics for Future Workshops
- Closing and Next Steps



WORKSHOP #1 RECAP



LOCAL PARTNERSHIP PROGRAM - OBJECTIVE

Program Objective:

Provide funding to counties, cities, districts, and regional transportation agencies in which voters have approved

- fees or taxes dedicated solely to transportation improvements, or
- have imposed fees, including uniform developer fees, dedicated solely to transportation improvements.

LOCAL PARTNERSHIP PROGRAM - FUNDING

- Program Funding
 - \$200 million per year

- Incentive Funding

Each program cycle combines funds for multiple years. Incentive funding rewards new and renewed voter-approved measures dedicated solely to transportation improvements. To date, the Commission has awarded \$33 million incentive funding to seven taxing authorities.

- Program Distribution
 - 60% Formulaic - \$108 million per year
 - 40% Competitive - \$72 million per year
 - Incentive Set-Aside - \$20 million per year

2022 Competitive Cycle	2022 Formulaic Cycle
Program of Projects Adopted June 2023	(Initial) Program of Projects Adopted January 2023
2 years of programming - \$144 million	2 years of Programming - \$216 million
FY 2023-24, 2024-25	FY 2023-24, 2024-25

LOCAL PARTNERSHIP PROGRAM - ELIGIBILITY

Eligible Agencies:

Competitive Program (LPP-C)

Taxing authorities eligible for the Formulaic Program, or applicants with imposed fees, including uniform developer fees, dedicated solely to transportation improvements.

Formulaic Program (LPP-F)

Taxing authorities that have sought and received voter approval of taxes, tolls, or fees which are dedicated solely to transportation improvements. The agency must also administer those taxes, tolls, or fees.

Eligibility Criteria (Cycle 3 & 4):

Competitive Program (LPP-C)

The Competitive Program screens for eligibility and completeness and then uses the following evaluation criteria to inform project selection: accessibility, deliverability, projects that leverage funds above the required match, safety, air quality and greenhouse gases, vehicle miles traveled, community engagement, system preservation, and land use and housing goals.

Formulaic Program (LPP-F)

The Formulaic Program screens for eligibility and completeness.

2024 SENATE BILL 1 PROGRAM TIMELINE (TENTATIVE)

Cycles	Formulaic	Competitive
2024 Program	<p>(ALL DATES ARE TENTATIVE)</p> <ul style="list-style-type: none"> Guideline adoption - August 2024 Applications due - November 2024 Program adoption - January 2025 <p>(Duration: 5 months)</p>	<p>(ALL DATES ARE TENTATIVE)</p> <ul style="list-style-type: none"> Guideline adoption - August 2024 Applications due - November 2024 Program adoption - June 2025 <p>(Duration: 10 months)</p>

WORKSHOP FORMAT



Agendas be posted up to 10 calendar days before each workshop.



Presentations and recordings will be posted after each workshop.



Staff will make recommendations based on discussion and feedback.



Previously covered topics may not be readdressed at subsequent workshops unless determined necessary.

SUMMARY OF ATTENDEES AND TOPICS DISCUSSED AT WORKSHOP #1

ATTENDEES

- 65% LOCAL JURISDICTIONS
- 25% CALTRANS
- 10% PRIVATE INDIVIDUALS/BUSINESSES

TOPICS DISCUSSED

Should a percentage of LPP-C funds be expended on improvements in jurisdictions with certified Housing Elements:

- The CTC wants community involvement in the process of planning projects. Additionally, the pro-housing criterion is no more important than other evaluation criteria in determining the competitiveness of project application.

The role of Justice 40 in the Local Partnership Program:

- The CTC is currently evaluating Justice 40's applicability with the Local Partnership Program.

The levels of engagement and outreach the CTC is looking for with LPP:

- The CTC is interested in what agencies think about current requirements for public engagement and invites feedback.
- Currently, the Local Partnership Program requests agencies demonstrate some effort to engage with the public. For the competitive program, we are looking for robust engagement to show that projects are actively wanted by the public.

The differences between the Local Partnership Formulaic and Competitive Programs

Workshop #1 Stakeholder Feedback

We heard from stakeholders that:

- No set-asides should be created for the Local Partnership Competitive or Formulaic Programs.
- Some form of documentation on public engagement for projects should be provided, but there should be flexibility in the type of documentation submitted when applying for Local Partnership Program (Formulaic) funds.
- The current maximum award of \$25 million for LPP-C is a fair as it allows funding to be provided to both large and small projects.

LPP DISCUSSION TOPICS (FORMULAIC)



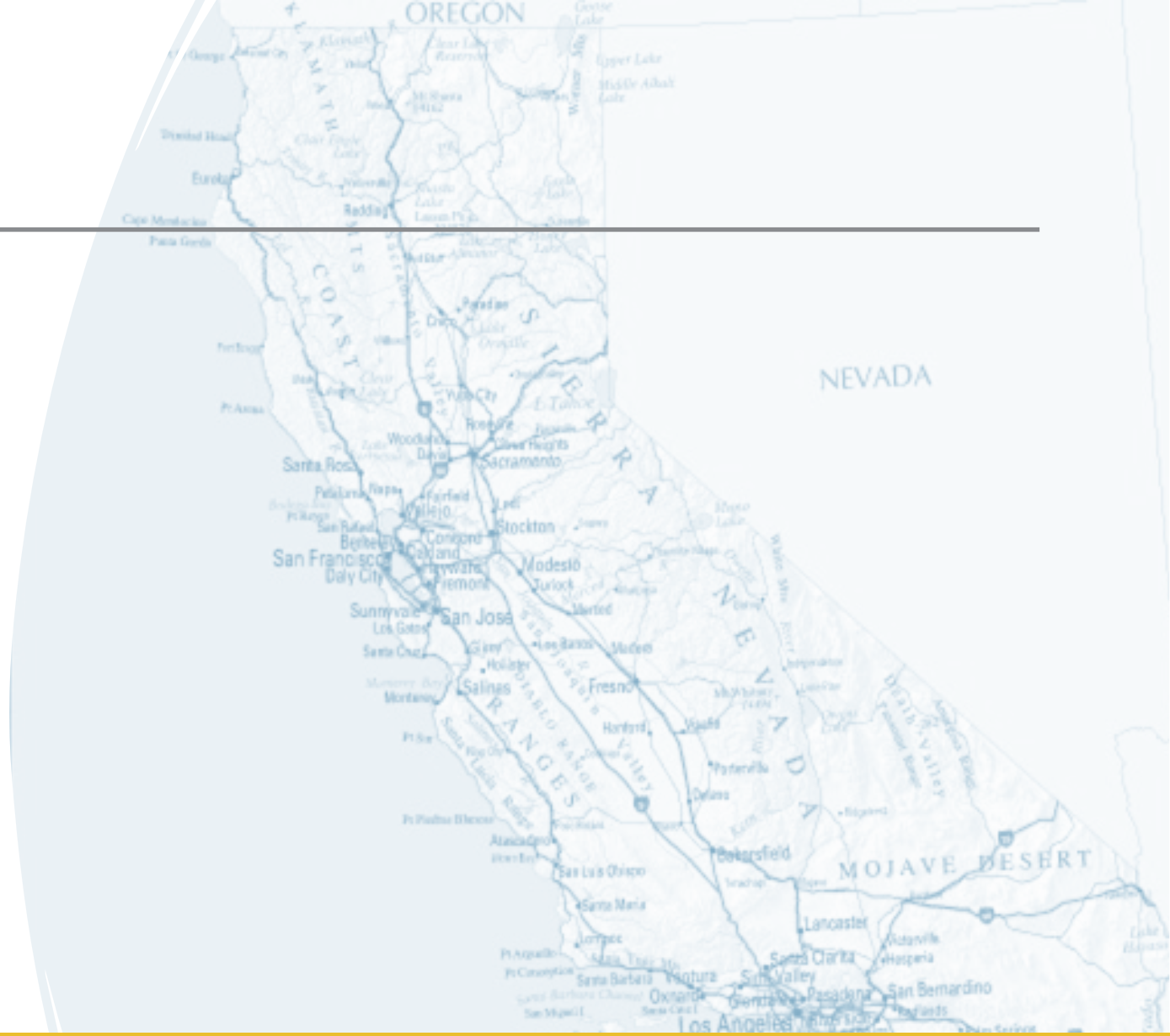
LPP (FORMULAIC) DISCUSSION TOPICS

- **SB 1 Competitive Programs' Transportation Equity Supplement**
 - Ideas on how to incorporate more community engagement in the Formulaic program?
- **Guidelines Language Clarification**
 - (LPP-F) Any criterion that needs to be more robust?
 - Any criterion that needs to be more flexible?
- **Technical Updates**

FORMULAIC – APPENDIX A

Administering Agency	Ballot Designation	Expiration Date
Alameda County Transportation Commission	Measure BB Measure F	March 31, 2045 None
Alameda-Contra Costa Transit District	Measure C1/VV	June 30, 2039
Bay Area Rapid Transit District (BART)	Measure RR Measure AA	None August 31, 2038
Bay Area Toll Authority	Regional Measure 1 Regional Measure 2 Regional Measure 3	None None None
Caltrain	Measure RR	June 30, 2051
City/County Association of Governments of San Mateo County	Measure M	May 1, 2036
City and County of San Francisco	Proposition D	November 5, 2045
Clearlake	Measure V	March 31, 2037
Contra Costa Transportation Authority	Measure J	March 31, 2034

LPP DISCUSSION TOPICS (COMPETITIVE)



LPP (COMPETITIVE) DISCUSSION TOPICS

- **Is the maximum award of \$25 million working?**
 - Alt Scenario 1: \$40m per project funds 4.5 projects
 - Alt Scenario 2: \$15m per project funds 12 projects
- **Expanding what “System Preservation” means**
- **Guidelines Language Clarification**
- **Pro-housing:** How did it affect your project nominations if at all?
- **Community Engagement:** Any concerns or challenges?
 - SB1 Office will be hosting a workshop focused on the Transportation Equity Supplement with the Equity Advisory Committee
- **Guidelines Language Clarification**
 - Any criterion that needs to be more robust?
 - Any criterion that needs to be more flexible?

FREQUENTLY ASKED QUESTIONS



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- **Can we shift programmed funds to a different year?**
 - Formulaic vs Competitive
- **We have a project delay; can we get a time extension?**
- **Bids are higher than our engineer's estimate, can we seek supplemental funds?**
 - Formulaic vs Competitive
- **Eligibility questions**

2024 CYCLE OFFICE HOURS



OFFICE HOURS

Local Partnership Program office hours will begin March 2024 and conclude May 2024

- Scheduled 30-minute appointments, Closed, virtual sessions
- Appointments will be reserved on a first-come-first-served basis
- 1-on-1 time with Commission staff to answer questions about specific projects or the application process
- Sessions will not be used to discuss guidelines development
- Registration link on program web page: <https://catc.ca.gov/programs/sb1/local-partnership-program>



KEY DISCUSSION TOPICS FOR SUBSEQUENT WORKSHOPS



BRAINSTORMING TOPICS

CLOSING AND NEXT STEPS



SB1 Office Looking Forward to Cycle 4

- Two-year program periods (FYs 2025-2026 and 2026-2027)
- Additional changes to promote community engagement and equitable outcomes
- Greater consideration on workforce development
- Continue inclusion of medium-term CAPTI strategies for SB 1 Programs
- Reinforce statutory and program requirements

LPP GUIDELINES DEVELOPMENT WORKSHOP #3

Early April 9, 2024

2:30-4:00pm

Watch for the Registration Announcement



CONTACT INFORMATION

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<https://catc.ca.gov/programs/sb1/local-partnership-program>



THANK YOU

