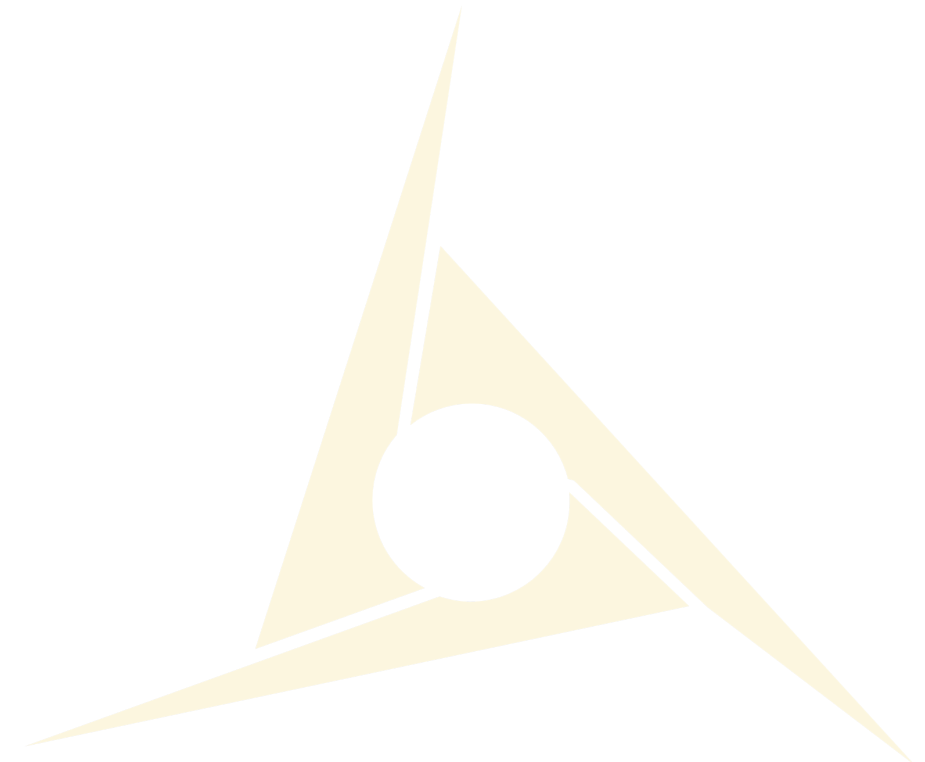


State and Local Transportation Needs Assessment Needs, Revenue, and Gap Analysis

September 18, 2024



Welcome and Agenda Review

Frances Dea-Sanchez | Needs Assessment Program Manager

Senate Bill 1121 State and Local Transportation Needs Assessment

Senate Bill 1121 (Gonzalez, 2022)

- Commission to prepare a 10-Year Statewide Transportation Needs Assessment
- Assess costs to operate, maintain, and grow the statewide multimodal system
- Consider costs to address climate resiliency
- Compare costs against available transportation revenue

Webinar Agenda

- Welcome and Opening Remarks
- Webinar Logistics
- Content Review of 2025 Needs Assessment
- Transportation Needs, Revenue & Gap Analysis
- Needs Assessment Delivery Schedule
- Wrap-up and Next Steps

Webinar Logistics

Justin Hall | Associate Governmental Program Analyst

Content Review of 2025 Draft Needs Assessment

Frances Dea-Sanchez | Needs Assessment Program Manager

Chapter Headings

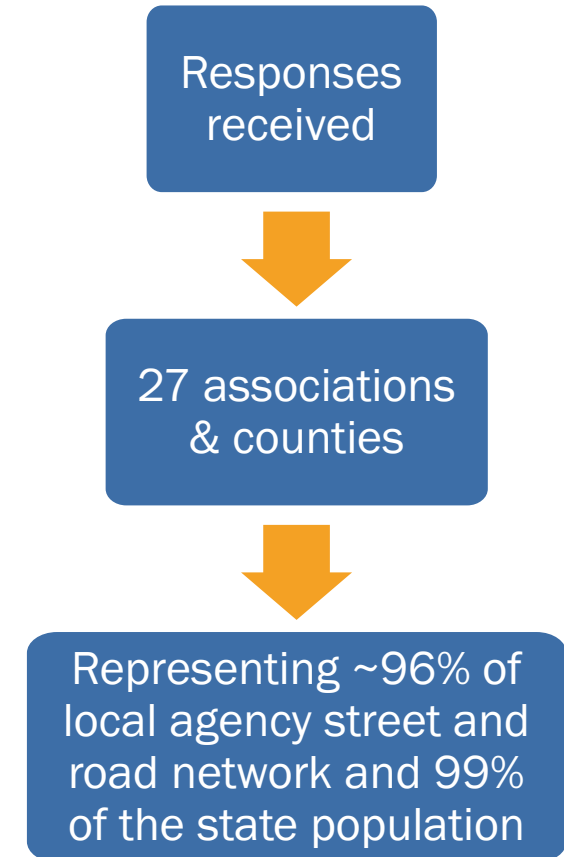
- | | | | |
|---|-------------------------------------------|----|------------------------------------------------------------------|
| 1 | Introduction | 7 | Tribal Transportation |
| 2 | Report Development Process | 8 | Accessibility and Mobility |
| 3 | Compete Streets and Active Transportation | 9 | Climate Adaptation Challenges and Impacts |
| 4 | Statewide Local Roads and Streets | 10 | Revenue Impact of Zero-Emission and More Fuel-Efficient Vehicles |
| 5 | State Highway System | 11 | Summary of Transportation Needs, Revenue, and Funding Shortfall |
| 6 | Transit and Rail Systems | 12 | Policy Recommendations |

Transportation Needs, Revenue, and Gap Analysis

Linda Pierce | Principle | NCE

Extended Needs Survey

- Sent to Metropolitan Planning Organizations, Regional Transportation Planning Agencies and other counties
- Requested information:
 - Status of regional transportation plan
 - 10-year multimodal transportation needs
 - 10-year revenue projections
- Excluded high-speed rail and airports



Extended Needs Survey: 2025 to 2035 Multimodal Transportation Needs

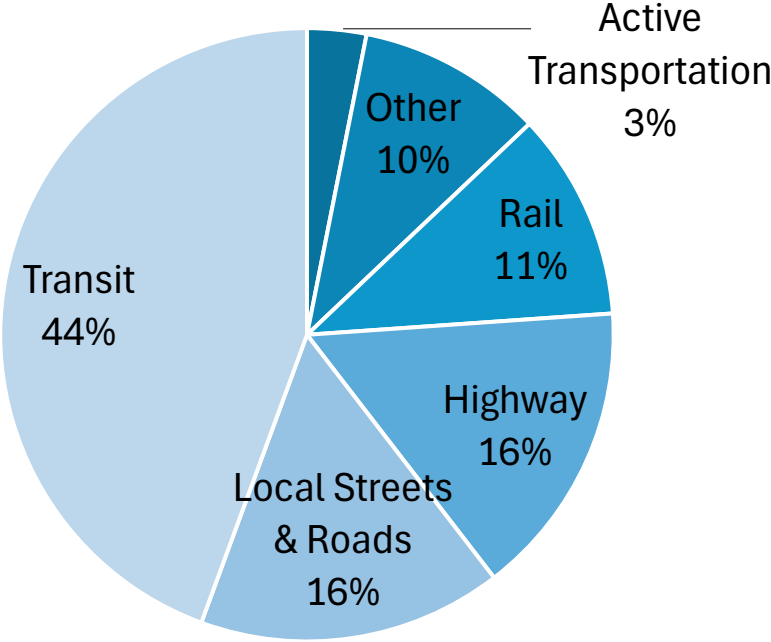
- Review responses
- Apply general category
- Exclude airport needs

Not all asset needs are shown

Asset	Asset Category	Responses	Total all Responses
Maintenance, Operations, and Rehabilitation	Local Streets & Roads	28	\$70,360,209,774
Active Transportation	Active Transportation	26	\$16,813,670,875
Transit Capital	Transit	26	\$56,220,868,394
Transit Operations	Transit Operations	24	\$167,579,044,618
Maintenance, Operations, and Rehabilitation	Highway	22	\$57,757,221,141
Local Roads Pavements	Local Streets & Roads	19	\$16,834,345,000
Transportation System Management	Highway	18	\$9,526,630,822
Transit Maintenance and Rehabilitation	Transit	18	\$32,891,926,896
Local Roads Safety	Local Streets & Roads	17	\$5,301,934,896
Highway Safety	Highway	14	\$5,785,058,640
Local Roads Complete Streets	Active Transportation	14	\$1,289,821,841
Any other costs (identify the costs included)	Other	13	\$56,834,457,425

2025 to 2035 Multimodal Transportation Needs - Summary

Asset	Examples	Needs (\$B)
Transit	Capital, operations, maintenance & rehabilitation	\$257.5
Local streets & roads	Maintenance, operations, rehabilitation, bridge, safety	\$93.1
Highway	Maintenance, operations, rehabilitation, bridge, safety	\$90.8
Rail	Expansion, efficiency, operations, maintenance	\$63.6
Other	Not specified	\$56.8
Complete streets & active transportation	Not specified	\$18.1
TOTAL		\$580.0



2025 to 2035 Revenue Projections

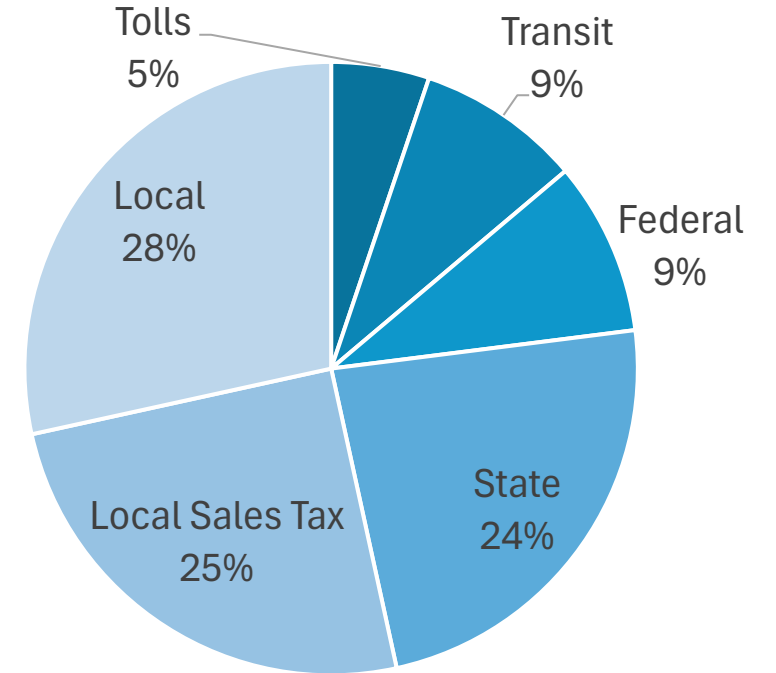
- Agency responses reviewed and compiled
 - Based on agency Transportation Plans
- Applied (confirmed) revenue summary categories
- Excluded revenues related to airports

Not all revenue sources are shown

Source	General Category	Responses	Revenue
STIP (state)	State	27	\$5,535,752,603
SHOPP (state)	State	23	\$43,724,533,221
Other local	Local	21	\$103,692,512,598
Senate Bill 1 (state)	State	20	\$16,688,381,656
Other state	State	20	\$33,194,856,321
Local sales tax	Local Sales Tax	17	\$126,332,191,119
Federal Grants	Federal	16	\$23,170,521,725
Other Federal (specify type of federal funds)	Federal	13	\$7,805,925,424
Other (specify type)	Local	8	\$37,825,941,792
Other Federal (CMAQ)	Federal	5	\$3,089,781,663
Infrastructure Investment and Jobs Act (IIJA)	Federal	5	\$81,012,104
Highway Bridge Program (HBP)	State	5	\$290,293,476

2025 to 2035 Revenue Projections – Summary

Source	Examples	Revenue (\$B)
Other local	Mitigation fees, transportation funds, forest reserves	\$143.8
Local sales tax	Local & regional sales tax, Measure M	\$126.4
State	SB 1, STIP, SHOPP	\$119.2
Federal	BIL, BUILD, IJA, INFRA, HIP	\$46.2
Transit	Federal, local, and state	\$43.9
Tolls	Not specified	\$26.2
TOTAL		\$505.7



State Highway System Management Plan

Asset	Needs (\$B)
Highway	\$49.3
Resiliency	\$23.0
Active Transportation	\$16.1
Safety	\$11.4
Drainage	\$7.3
Facilities	\$5.6
Other	\$5.0
Total	\$117.7

Category	Investment (\$B)
SHOPP Historical	\$53.3
Maintenance	\$7.7
SHOPP New Objectives	\$5.3
Total	\$66.3

SHOPP – State Highway Operations and Protection Plan

More work is needed to capture and quantify the needs

Transit and Rail – Capital and Operations

- Senate Bill 125
 - \$4.0 billion in operations and capital improvements
 - \$1.1 billion for zero-emission transit equipment and operations
 - Quantify capital and operations needs and funding shortfall (report anticipated 2025)
- 2024 California State Rail Plan needs:
 - \$20.6 billion by 2027
 - \$25.7 billion by 2032
 - \$53.1 billion by 2050

- Estimated 10-year Needs
 - Based on historical spending and existing vehicle inventories
 - Vehicle replacement
 - Conversion to electric vehicles

Category	Needs (\$B)
Expenses	\$33 to \$38
Zero-emission vehicles	\$2 to \$4
Total	\$35 to \$42

More work is needed to capture and quantify the needs

Tribal Transportation

- Second largest number of tribal governments in the U.S.
 - 109 federally-recognized tribes
 - 62 non-federally-recognized tribes
- Largest population of Native Americans (806,874 as of 2024)
- Statewide, more than 930 centerline miles of roadways on tribal lands

- Based on Humboldt County analysis of pavement condition (only):

- 113.5 centerline miles evaluated
- On average, are in poor to failed condition
- 10-year needs: \$66.5 million



- Assume tribal roads, statewide, are in similar condition:
 - 10-year needs: \$0.5 billion

More work is needed to capture and quantify the needs

Accessibility and Mobility

- Needs for:
 - Seniors
 - People with disabilities
 - Veterans
 - People with low income
- Dedicated Funding Sources
 - Transportation Development Act
 - Caltrans grant program
 - Consolidated Transit Services Agency (regional governments – limited federal, state, and local funds)
 - Transportation Network Company Access for All Program

More work is needed to capture and quantify the needs

Climate Adaptation Challenges and Impacts

- 2023 State Highway Systems Management Plan
 - Estimated need to address sea level rise and storm surge:
 - \$14.7 billion by 2033 (~\$15.3 billion by 2035)
 - \$56.0 billion by 2100
 - \$1.8 billion to address sea-level rise for the 2033 Ten-Year Project Book
- Revenue
 - PROTECT (federal)
 - \$630 million to California (over 5 years)
 - Additional funding through competitive grants

Revenue Impact of Zero-Emission Vehicles

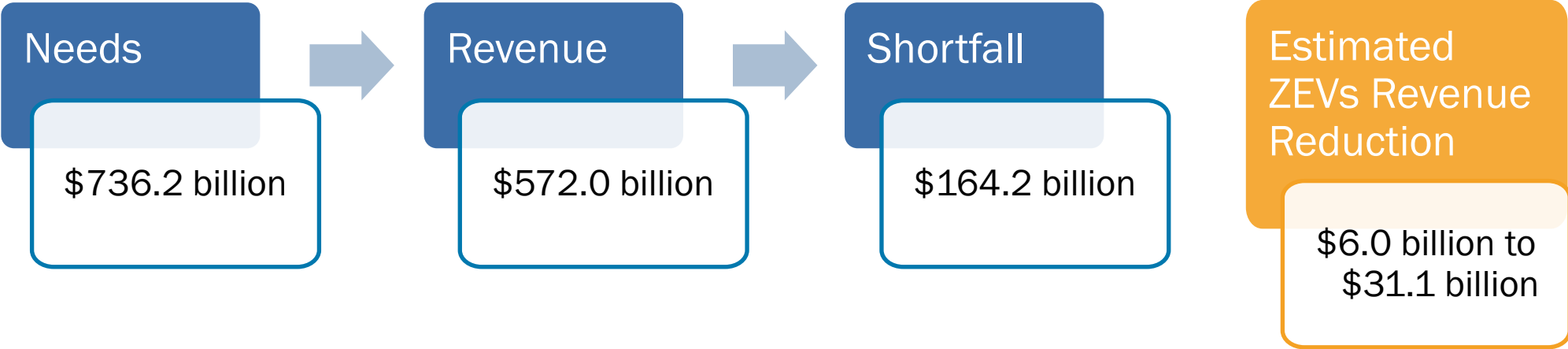
Study	General Approach	10-Year Reduction
Legislative Analyst's Office	85% of new vehicle purchases as zero-emission vehicles by 2045 65% of new vehicle purchases as zero-emission vehicles by 2045 and improved fuel efficiency	\$13.2 billion \$29.9 billion
Needs Assessment Analysis	Adoption of Advanced Clean Cars II/Fleet and improved fuel efficiency	\$31.1 billion
Mineta Transportation Institute	Varied vehicle miles traveled Varied rate of new vehicle purchases as zero-emission vehicles Improved fuel efficiency	\$6.0 billion to \$30.3 billion

2025 to 2035 Statewide Needs and Revenue Summary

Asset	Need (\$billion)
Transit and rail	\$359.6
State highway system	\$187.5
Local roads and streets	\$93.1
Complete streets & active transportation	\$34.2
Other	\$61.8
Total	\$736.2

Source	Revenue (\$billion)
State	\$185.5
Local and regional sales tax	\$126.4
Federal	\$46.2
Transit	\$43.9
Tolls	\$26.2
Other local	\$143.8
Total	\$572.0

2025 to 2035 Statewide Funding Shortfall



Needs Assessment Delivery Schedule

Frances Dea-Sanchez | Needs Assessment Program Manager

Full Needs Assessment Timeline

DATE	MILESTONE
January 28, 2024	Final Interim Needs Assessment Submitted to California Legislature
February 16, 2024	Technical Workshop (virtual)
February 21, 2024	Technical Workshop (virtual)
May 30, 2024	Policy Recommendations Workshop (Los Angeles/Virtual)
June 17, 2024	Policy Recommendations Workshop (Sacramento/Virtual)
Fall to Winter 2024	Continued Stakeholder Workgroup Meetings Draft Needs Assessment Released for Public Comment Draft Needs Assessment Presented to the Commission
First Quarter 2025	Final Needs Assessment Adoption Final Needs Assessment Submitted to California Legislature

Wrap Up and Next Steps

Nina Hosseini | CTC, Student Assistant

Wrap Up and Next Steps

- Wrap Up
- Next Steps
 - September 19 Workgroup Meeting
 - Additional Areas of Focus
 - October 1 Workgroup Meeting
 - Policy Recommendations Workshop Discussion
 - Release of Draft 2025 Full Needs Assessment

Contacts

Frances Dea-Sanchez
SB 1121 Program Manager | Planning
frances.dea-sanchez@catc.ca.gov

Laura Pennebaker
Deputy Director | Planning
laura.pennebaker@catc.ca.gov

Thank You

SB 1121 State and Local Transportation Needs Assessment Webpage
<https://catc.ca.gov/programs/sb1121>

