

Caltrans System Investment Strategy

PUBLIC WORKSHOP – SEPTEMBER 2023

Opening Remarks

Marlon Flournoy

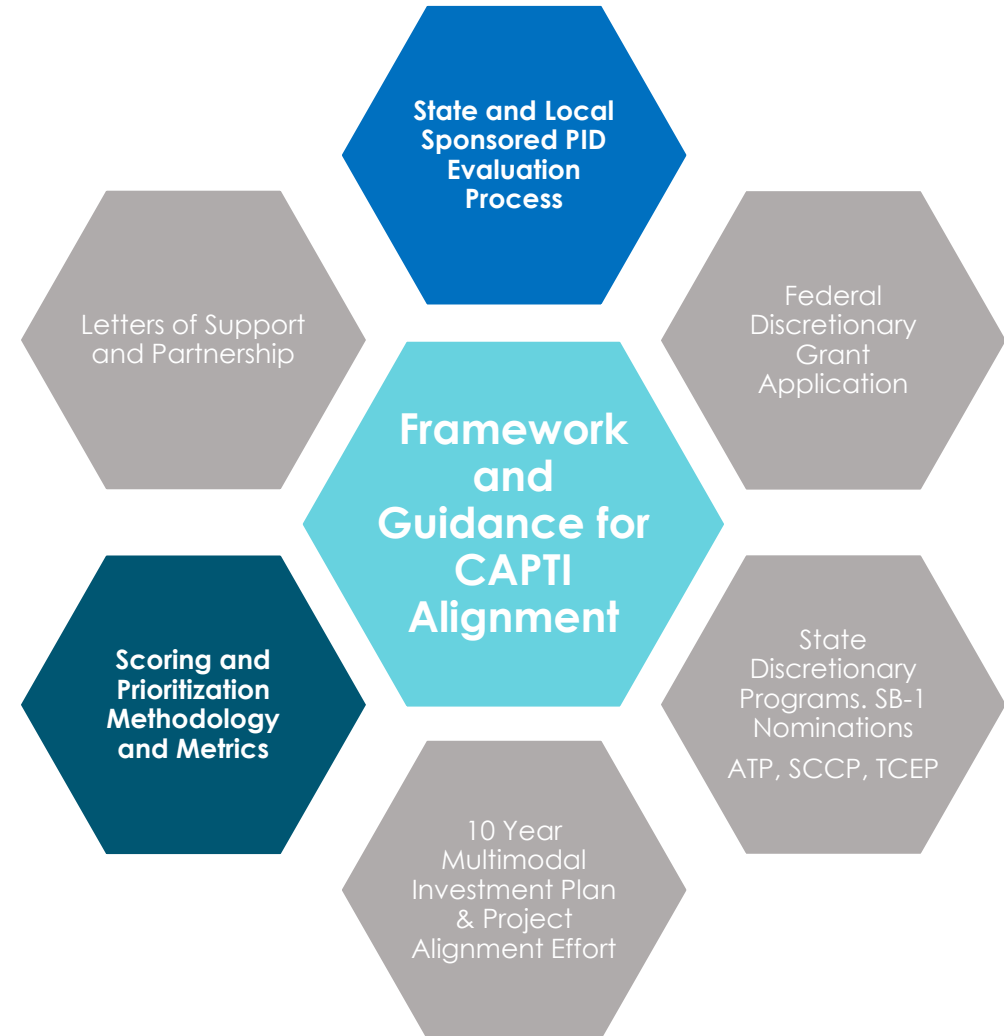
Division Chief

Division of Transportation Planning



CSIS Update

- CSIS 2.0
 - Main Document narrative
 - Local Sponsored PID Guidance
 - Quantitative Metrics update (covered in separate presentation)



CSIS Main Document and Website

SECTIONS

- **Evaluation Criteria**
- **Project Initiation**
- **Project Nomination**
- Grant Support
- Letter of Support
- CSIS Implementation

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Caltrans System Investment Strategy (CSIS)

Caltrans System Investment Strategy (CSIS)

The California Department of Transportation (Caltrans) is committed to leading climate action and advancing social equity in the transportation sector set forth by the California State Transportation Agency (CalSTA) Climate Action Plan for Transportation Infrastructure (CAPTI, 2021). The CAPTI supports the California Transportation Plan (CTP) 2050 (2021) goals that works to meet the State's ambitious climate change mandates, targets, and policies set forth by Executive Order (EO) N-19-19 and N-79-20, signed by Governor Gavin Newsom in 2019 and 2020, respectively.

Caltrans is in a significant leadership role to carry out meaningful measures that advance state's goals and priorities through the development and implementation of the Caltrans System Investment Strategy (CSIS). The CSIS, which implements one of CAPTI's key actions, is envisioned to be an investment framework through a data and performance-driven approach that guides transportation investments and decisions. This framework includes methodologies and processes for how Caltrans should invest billions of dollars of highly competitive fund programs that will address transportation deficiencies while also achieving the CAPTI Guiding Principles.

Latest Updates

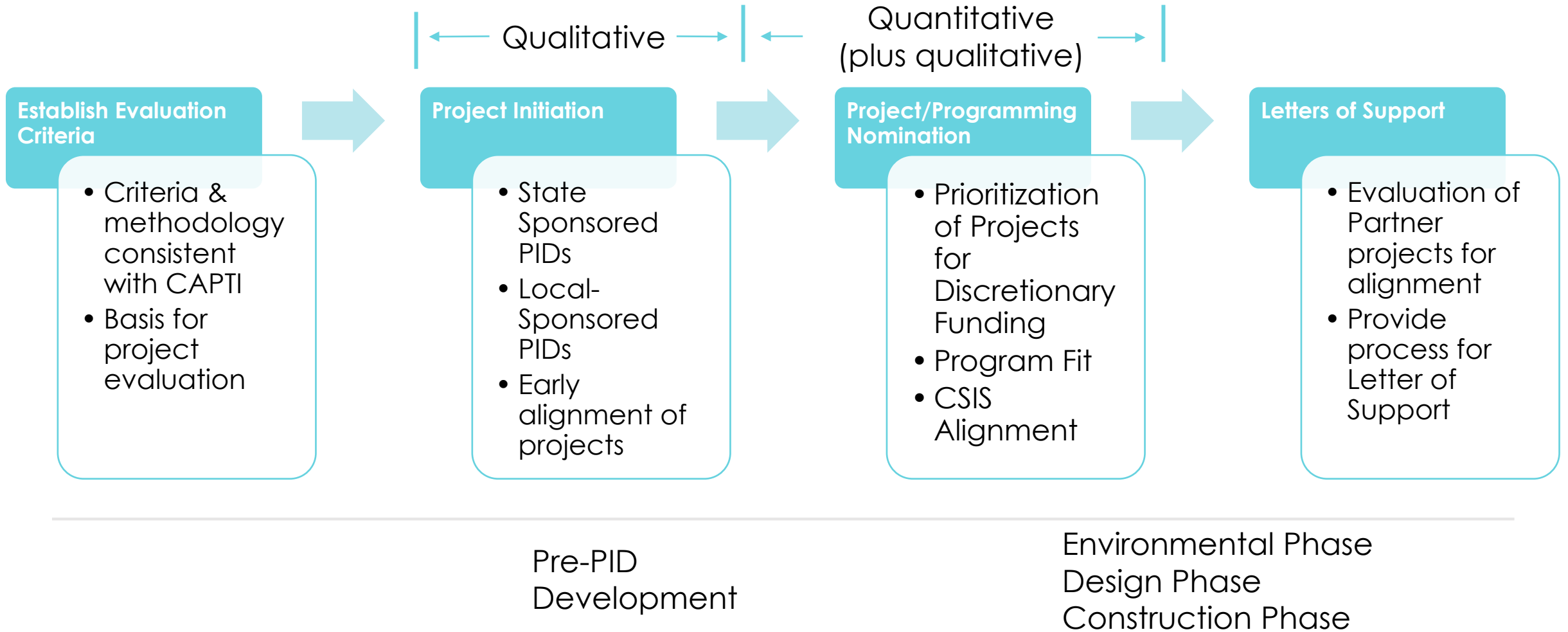
- CSIS 2.0 Public Workshops in September
- CSIS 2.0 Draft Review in October

Equity Considerations

CSIS includes equity in the overall framework.

- [Caltrans Equity Statement](#)
- [The Caltrans Race & Equity Action Plan \(REAP\)](#)

CSIS Evaluation Framework



CSIS Main Document – Project Initiation

- **Local Sponsored PID Evaluation Guidance**
 - Uses project concepts to categorize and provide recommended scope changes.
- **State Sponsored PID Guidance**

F.3 State-Sponsored Non-SHOPP PID Scoring Criteria

QUESTION	CRITERIA QUESTION TITLE	CAPTI ALIGNMENT
1	Mode Shift	CAP 1 and CAP 2
2	Vehicles Mile-Traveled (VMT)	CAP 7
3	Public Engagement	CAP 5
4	Benefits to Disadvantaged Communities	CAP 5
5	Improve Safety	CAP 4
6	Expand Zero Emission Vehicle Infrastructure	CAP 3 and CAP 8
7	Address Climate Change	CAP 6
8	Natural and Working Lands	CAP 10
9	Infill Development	CAP 9

4 Step Process – Local Sponsored PID Eval Guidance

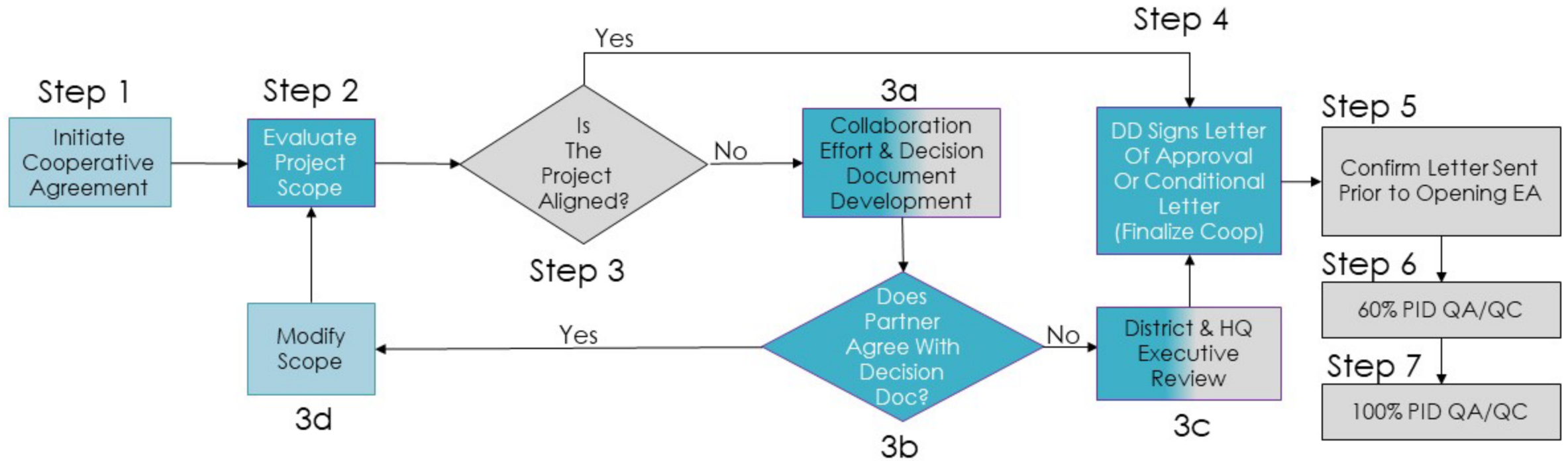
Step 1 – Applicant submits information to district

Step 2 – District reviews project concepts

Step 3 – HQ reviews project concepts

Step 4 – District Director signs letter and **sends to applicant**

Draft Local Sponsored PID Flow Chart



Color Indicates Process/Decision-Owner



DD - District Director, EA – Expenditure Authorization
 QA – Quality Assurance, QC- Quality Control

Local Sponsored PID Evaluation Guidance

EVALUATE PROJECT SCOPE

- **District Investment Planning Manager** or designee will review project concepts and provide recommendation with conceptual guidance as a reference for best practice.
- District and **Local considerations** should be called out for HQ review.
- Headquarters will provide training to the districts after Guidance is finalized.

Conceptually Aligned

Needs Further Consideration

Project Concepts (including but not limited to the following concepts)	Alignment Category
<p>Transit/Rail:</p> <ul style="list-style-type: none"> • Transit only lanes that prohibit passenger vehicles, bus-on-shoulder • Traffic signal priority for new or improved transit service • New rail capacity • New mobility hubs, transit stations, and rail stations <p>Bike facilities:</p> <ul style="list-style-type: none"> • Protected bikeway or bike facility consistent with DIB 94 Contextual Guidance • Secure bicycle parking <p>Pedestrian facilities and crossings:</p> <ul style="list-style-type: none"> • Sidewalks, median islands, pedestrian hybrid beacons, pedestrian bridges, etc. <p>Freight/goods movement:</p> <ul style="list-style-type: none"> • Truck only lanes that prohibit passenger vehicles • ZEV goods movement <p>Other:</p> <ul style="list-style-type: none"> • Ped/bike/transit/rail grade crossing or separation projects • Broadband, ZEV charging stations, hydrogen fueling stations <p>Passenger vehicles:</p> <ul style="list-style-type: none"> • Integrated corridor management, Incident management enhancements • Adaptive ramp metering • Roundabouts • Auxiliary lanes (less than one mile), passing lane (less than 2 miles) • Managed lanes conversions (HOV to toll, General Purpose to HOV) 	<p>Conceptually Aligned</p>

Bike facilities:

- Bike facility not consistent with Design Information Bulletin 94

Freight/goods movement:

- Truck only lanes or truck climbing lanes (does not prohibit passenger vehicles and/or provide physical separation)

Passenger vehicles:

- Passing lanes (creates passing lane longer than 2 miles every 7 miles)
- Widen shoulder for the purpose of future lane additions
- Managed lanes additions
- New priced lanes
- Traffic control devices
- Adding lanes to arterials
- Auxiliary lanes (more than one mile or continuous*)
- New Interchange
- General purpose lane additions

*Continuous - extension of an existing auxiliary lane to equal more than one mile in length.

Needs Further
Consideration.

CSIS 2.0 Main Document – Project Nomination

Program Fit

- Projects are scored high, medium, or low
- Considers the intent of the funding program
- Selects the most competitive projects

CSIS Alignment

- Project Review Committee (PRC) evaluates responses provided in the intake form
- Subject matter experts (SMEs) score their area of expertise.
- Scores are averaged for each criterion and combined for total score.

Program Fit
High
Medium
Low

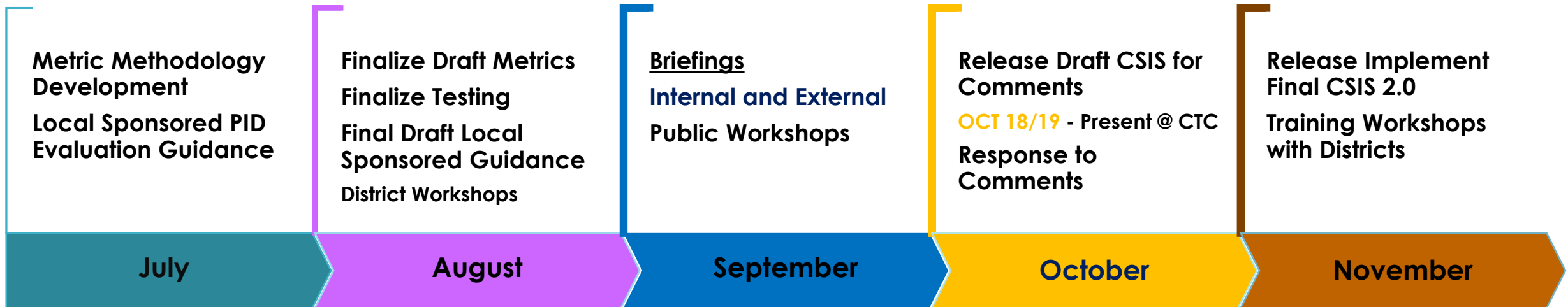
CSIS Main Document – 2.0 Performance Metrics

Quantitative Metrics	
Safety	Disadvantaged Community (DAC) Traffic Impacts
Vehicle Miles Traveled (VMT)	Multimodal and Clean Freight
Accessibility	Land Use and Natural Resources
Disadvantaged Community (DAC) Access to Jobs/destinations	Passenger Mode Shift

Qualitative Metrics
Public Engagement
Climate Adaptation/Resilience
Zero Emission Vehicle Infrastructure

CSIS 2.0 Schedule

FOR DISCUSSION



CONTACT

CSIS PROGRAM MANAGER

Kevin Tucker
kevin.tucker@dot.ca.gov

OFFICE OF CORRIDOR & SYSTEM PLANNING

Roy Abboud
Office Chief
roy.abboud@dot.ca.gov

CSIS SUPPORT

David Huff
david.huff@dot.ca.gov

PID NOMINATION PROGRAM MANAGER

Binoy Alexander
Office Chief
Binoy.alexander@dot.ca.gov