

SF Bay Conservation and Development Commission

# Sea Level Rise Adaptation Funding & Investment Strategy

May 21, 2026



# How Much Will it Cost?

## Adaptation Needs

**\$96 billion<sup>1</sup>**

Estimated cost of sea level rise adaptation through 2050 (in Year of Expenditure dollars)

- **\$59 billion:** Estimated cost for known or planned projects
- **\$37 billion:** Estimated placeholder cost for areas with adaptation needs

## Cost of Inaction

**\$230+ billion<sup>2</sup>**

Estimated value of a subset of assets at risk through 2050

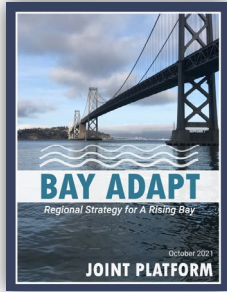
**The cost of inaction is far higher than the cost of adaptation.**

We stand to lose much more if we do not act

<sup>1</sup> In year of expenditure (YOE) dollars from Plan Bay Area 2050+.

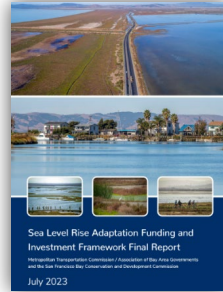
<sup>2</sup> In 2022 dollars from 2023 Funding & Investment Framework.

# The Work That Got Us Here



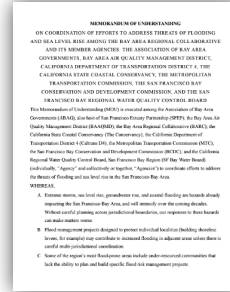
## Bay Adapt Joint Platform (2021)

Task 6.2 calls for the Investment Strategy and connects to many other Bay Adapt tasks.



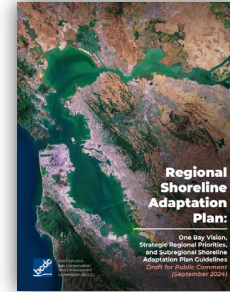
## SLR Investment Framework (2023)

Updated costs and public revenues  
Called for strategic funding  
Developed SAPMAP, database of locally submitted adaptation projects.



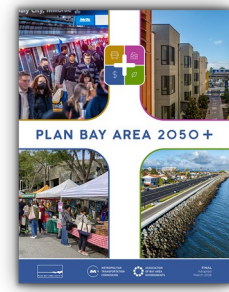
## SLR MOU (2024)

Coordinates regional sea level rise adaptation efforts among agencies.  
Called for the development of the Investment Strategy.



## RSAP (2024)

Requires jurisdictions to develop shoreline adaptation plans, for BCDC to approve plans, and the state to prioritize funding for projects in approved plans.



## Plan Bay Area 2050+ (2026)

Includes a first-ever resilience project list for the region, building upon the work of Plan Bay Area 2050 and the Investment Framework.

# What Is the Investment Strategy?

A **living resource** that organizes adaptation projects and potential funding sources into a tool for sorting, analysis, and advocacy.

WHO IS THE TOOL FOR?



## Funders

View projects and their funding needs



## Project Leads

Elevate projects to a regional context



## Agencies & Advocates

Generate insights for planning & advocacy



# The Investment Strategy Uses Data from Past & Ongoing Regional Efforts

## Shoreline Adaptation Project Map

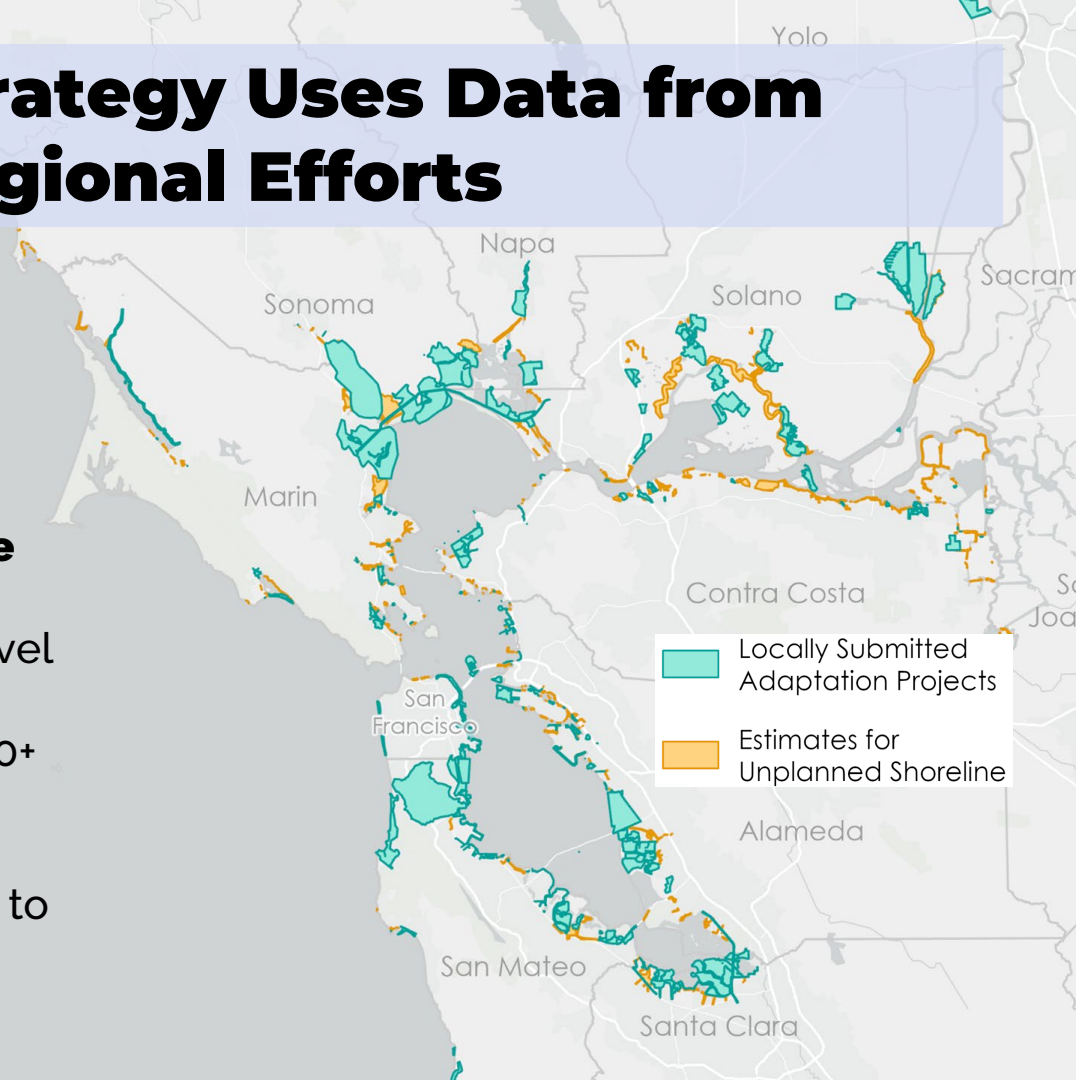
(SAPMAP)

- Annually updated dataset
- Connected to EcoAtlas

## Estimates for Unplanned Shoreline

Placeholders

- Developed for the 2023 Sea Level Rise Funding Framework
- Updated for Plan Bay Area 2050+ and again for the Investment Strategy.
- Updated as projects are added to EcoAtlas.

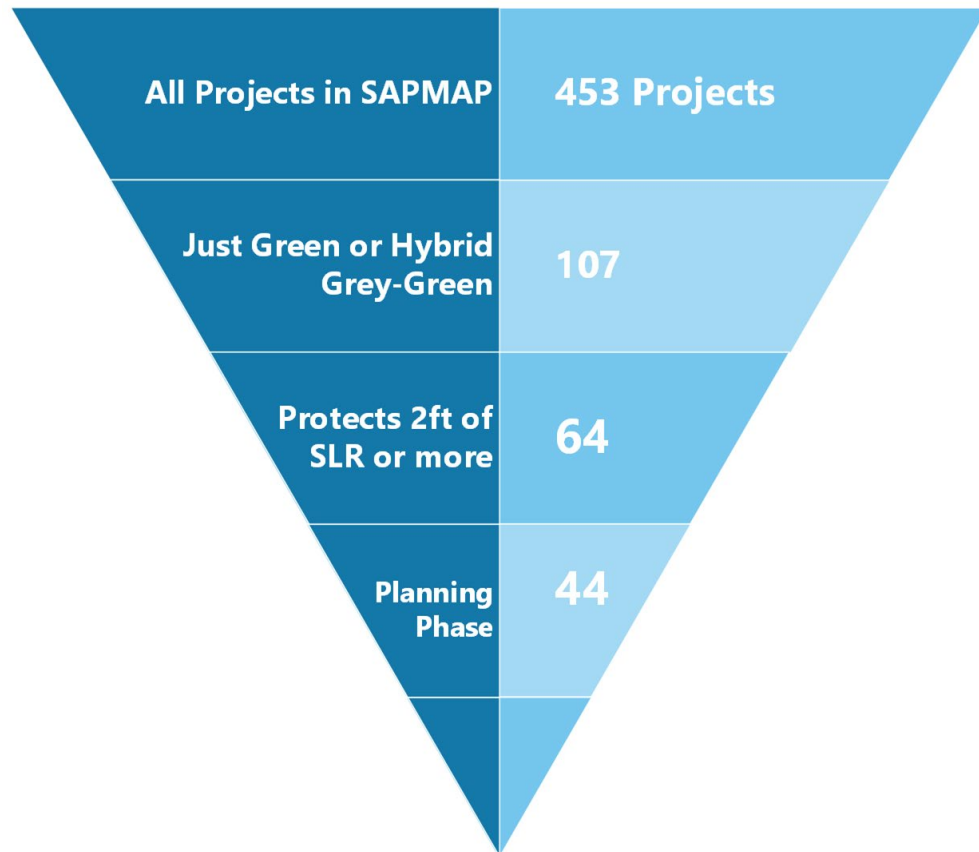


# Example Use Case

**A funder wants to provide targeted technical assistance to jurisdictions with potentially eligible projects.**

They are interested in:

1. Projects with nature-based solutions
2. Projects that offer significant flood protection
3. Projects that are in a planning phase



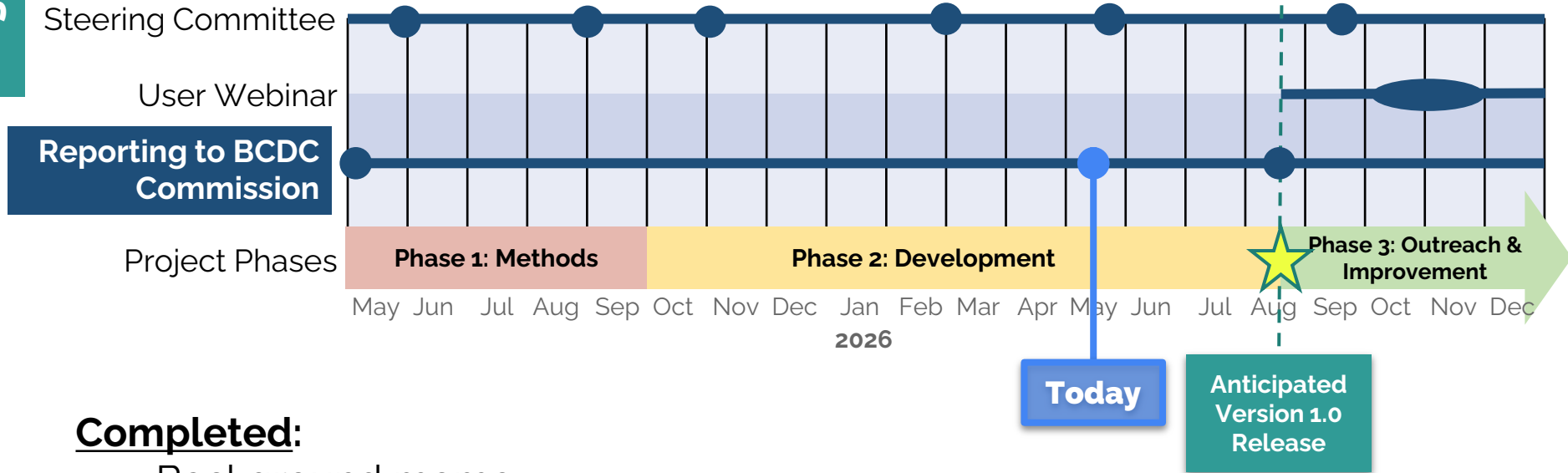
Results in the final tool could be different from example due to data improvements.



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# Our Work So Far: An Intermediate Update



## Completed:

- Background memo
- Steering Committee launch
- Data analysis methods
- Dataset updates
- GIS Data processing

## Ongoing:

- User interface development
- User testing of online application
- Steering Committee input

# Steering Committee

## Members Across User Groups Are Represented:

**Local agencies:** Transportation Authority of Marin (TAM), One Shoreline, City of Alameda, Port of San Francisco, Valley Water

**Regional Agencies:** Metropolitan Transportation Commission (MTC), San Francisco Estuary Partnership (SFEP)

**State Agencies:** Caltrans, California Natural Resources Agency (CNRA), State Coastal Conservancy (SCC), BCDC

**Federal Agencies:** U.S. Army Corps of Engineers (USACE), Environmental Protection Agency (EPA)

**NGOs:** San Francisco Estuary Institute (SFEI), Save the Bay, California Forward, Bay Area Council, Bay Planning Coalition

**And independent scientific experts.**

# What Does the Tool Do?

## Regional Data Summary:

**Funding Gaps**

**Assets at Risk**

**Habitat Features**

## Find Projects by:

**Geography**

**Assets at Risk**

**Project Status**

**Habitat Features**

**Cost**

**& More!**



# What Does the Tool Do?

## Learn About Projects:

**Location**

**Description**

**Assets**

**Flood Protection**

**Habitat Features**

**& More!**

## Other Features:

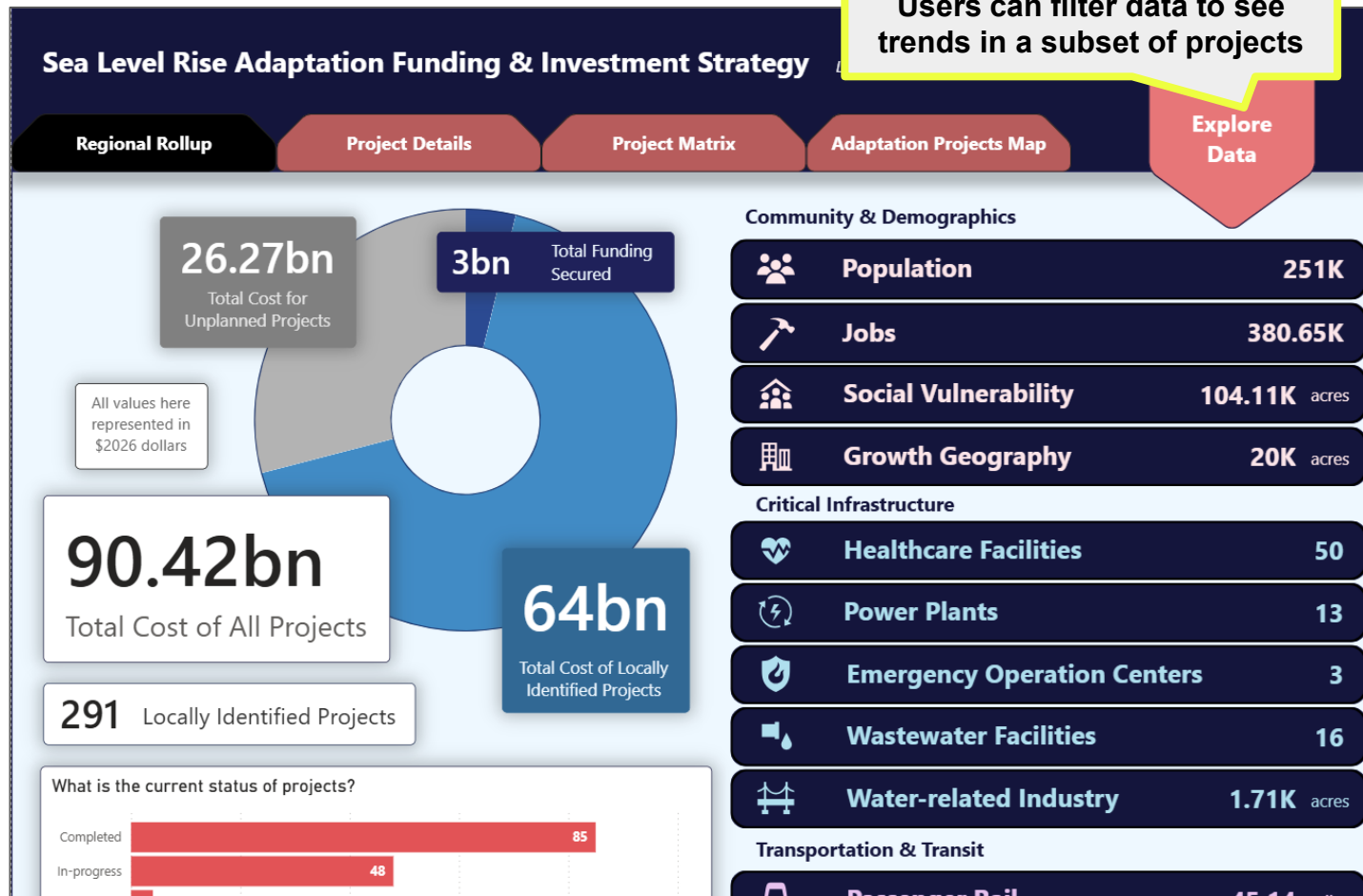
**Export Data**

**Project Map**

**Feedback Form**



# Regional Roll-up Review (Draft Design)\*



Users can filter data to see trends in a subset of projects

\*Design will likely change between now and launch

# Project Details (Draft Design)\*

## Sea Level Rise Adaptation Funding & Investment Strategy Last updated: 5/7/2026

Regional Rollup

Project Details

Project Matrix

Adaptation Projects Map

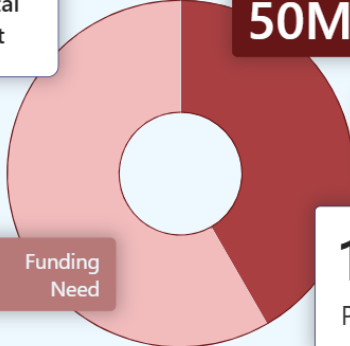
Explore Data

### What project would you like to explore?

Pick a project from the dropdown and explore all project specific info!

Downtown Coastal Resilience Project
▼

Downtown Coastal Resilience Project



50M

Funding Secured

70M

Funding Need

120M

Project Cost

### Abstract

The project aims to ensure the waterfront, and its critical regional and citywide assets, are resilient to hazards and increasingly accessible to the public.

### Community & Demographics

<b>Population</b>	85.55
<b>Jobs</b>	4.49K
<b>Social Vulnerability</b>	Yes
<b>Growth Geography</b>	Yes

### Critical Infrastructure

<b>Healthcare Facilities</b>	0
<b>Power Plants</b>	0
<b>Emergency Operation Centers</b>	0
<b>Wastewater Facilities</b>	0
<b>Water-related Industry</b>	0

### Transportation & Transit

\*Design will likely change between now and launch



# Incorporating Your Feedback

## Feedback

Describe **costs of inaction, where feasible**, when discussing adaptation costs.



Ensure **strong communication with locals** on the process for inclusion of projects.



## How we incorporated it

- Tool will **show nearby assets** for each adaptation project, demonstrating the impact of the project if implemented.
- Work on annual update from outreach to **local jurisdictions** in Fall 2026
- Power BI **user feedback** form
- 2026 **post-launch outreach**



# We have a funding gap, now what?



## Tool Insights

Created by Youssef Bungenan from Noun Project

- Glean insights from the funding tool on the characteristics of the regional funding need.
- Inform regional conversations on funding pathways.
- Respond to any future funding proposals/opportunities.

**Translate  
into action**



Created by metami septima from Noun Project

## Regional Policy Development

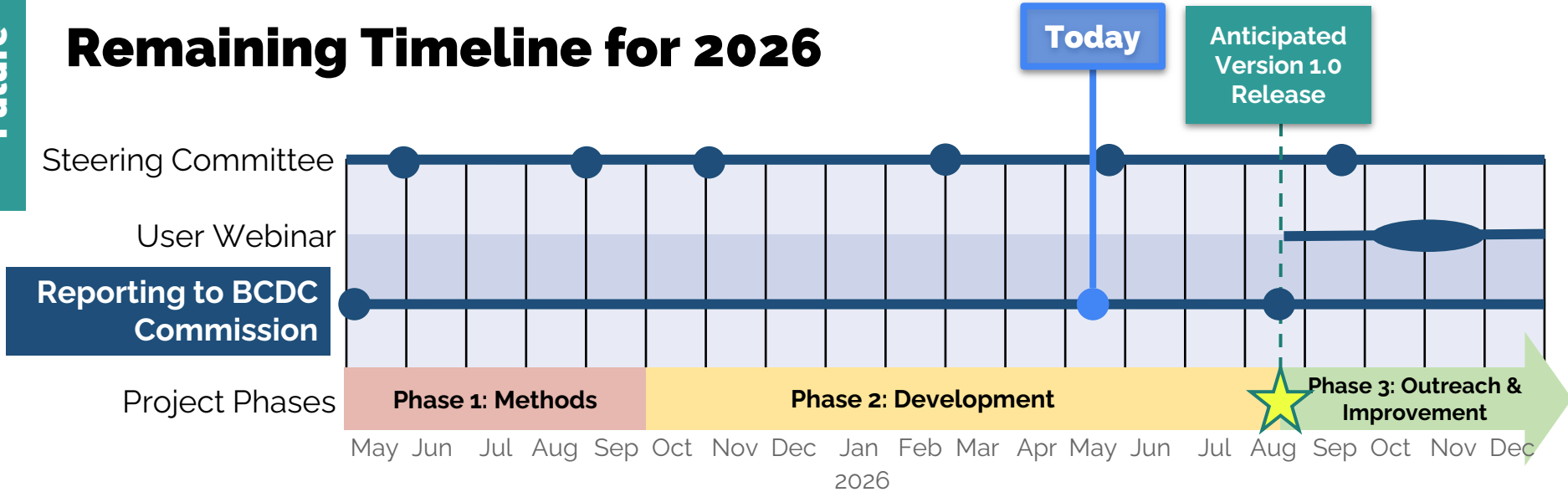
- Prioritize funding in accordance with SB272.
- Support regional convenings on sea level rise investment pathways.



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# Remaining Timeline for 2026



## Upcoming Key Milestones:

- Finish tool development, including user testing
- Version 1.0 release including report to BCDC and MTC/ABAG
- Gather input on outreach and ongoing tool improvements
- Develop and deliver user webinar
- Coordinate with SAPMap team on fall annual update



# Questions?

## Thank you to the Investment Strategy team!

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Todd Hallenbeck (BCDC)

Special thanks to the EcoAtlas Administrators (SFEI and various agencies)

