



STRATEGIC PLAN

2009-2013

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# Introduction





## 1.0 Introduction

In 1988, San Mateo County voters approved Measure A, a 20 year half-cent sales tax to fund and leverage additional funding for transportation projects and programs in San Mateo County. The approval of Measure A also created the San Mateo County Transportation Authority (TA) to manage and administer the sales tax revenues generated.

The TA is governed by a seven-member Board of Directors, and receives input from a volunteer Citizens Advisory Committee (CAC). The Board of Directors sets the overall policy direction for the TA and is composed of: two Board members (appointed by the county Board of Supervisors); four Board members representing the North County, Central County, South County and cities-at-large (appointed by the Cities Selection Committee); and one Board member (appointed by the San Mateo County Transit District). The CAC, which serves as a liaison between the public and the Board of Directors, is composed of 15 representatives from various segments of the community.

Over the last 20 years, Measure A has generated approximately \$1.2 billion in local revenue and other earnings and an additional \$1.2 billion in state and federal dollars. San Mateo County is one of 19 “self-help” counties in California that chose to tax itself in order to fulfill the county’s transportation needs. As a self-help county, the TA has been able to accelerate the completion of major projects by bridging funding gaps, leveraging other fund sources, and providing 100 percent of project funding, where necessary. After 20 years of financing noteworthy projects, the 1988 sales tax measure will expire December 31, 2008.

In 2004, 75.3 percent of the San Mateo County electorate reauthorized the Measure A program, including a Transportation Expenditure Plan, for an additional 25 years (2009 – 2033). The programs, identified by the cities, local agencies and citizens of San Mateo County, include all modes of transportation and address both current and anticipated congestion needs in San Mateo County.

The 2004 Transportation Expenditure Plan requires the TA to develop a Strategic Plan by December 31, 2008 that will be updated every five years, at a minimum. This document is the Strategic Plan which provides a policy framework for guiding programming and allocation decisions within the structure established by the 2004 Expenditure Plan. It is essential to emphasize that this plan is a living document that will continue to evolve as the TA implements the Measure A program.

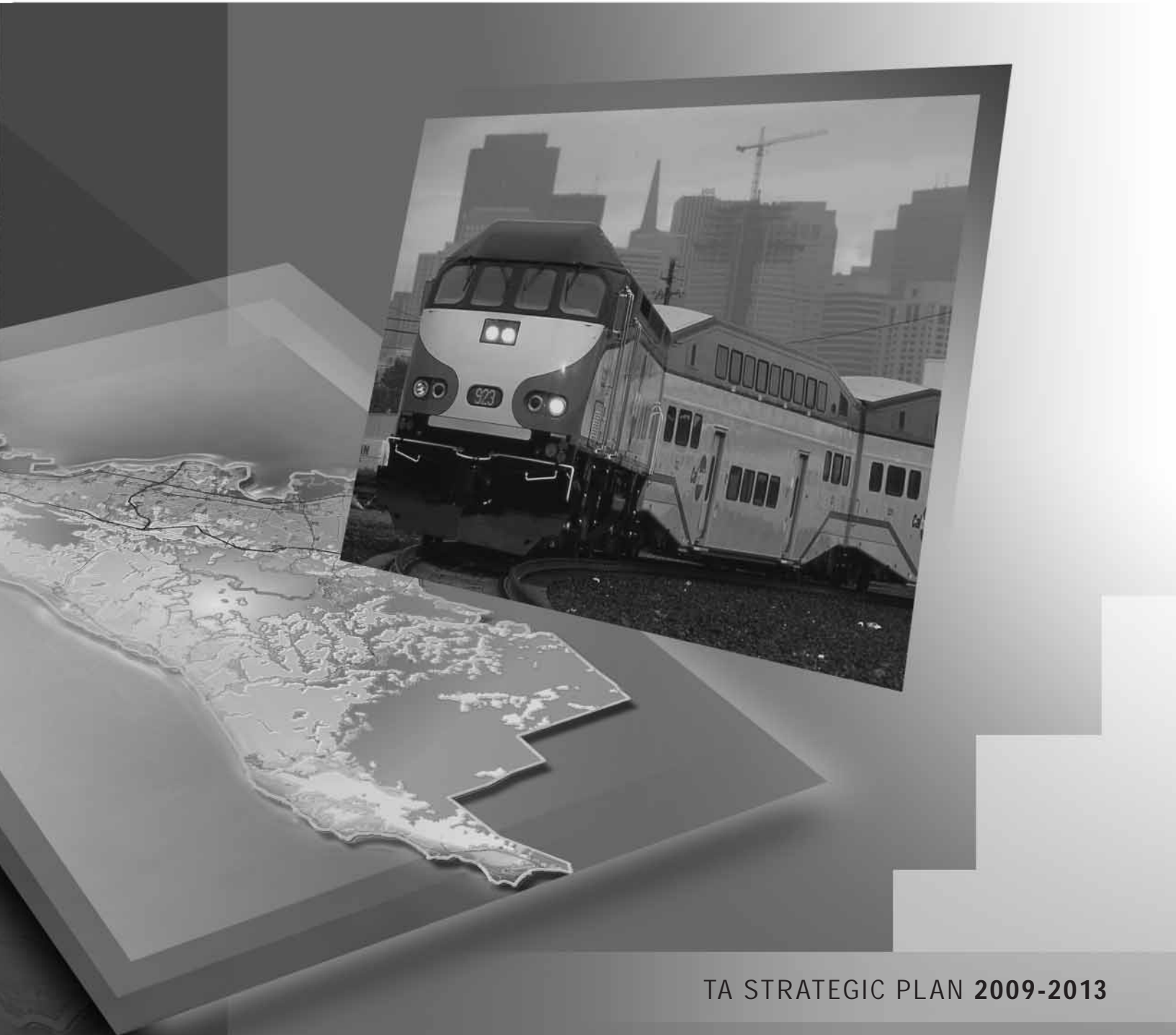
The Strategic Plan is organized into the following sections:

- **Section 1 provides an introduction to the TA, the 1988 and the 2004 Measure A Programs and the Strategic Plan**
- **Section 2 provides information about the 1988 Measure A Program and accomplishments**
- **Section 3 provides information about the 2004 Expenditure Plan**
- **Section 4 describes the planning process for preparing the Strategic Plan**
- **Section 5 describes the policy framework for guiding programming and allocation decisions**
- **Section 6 outlines fund management guidelines**
- **Section 7 outlines next steps**



## CHAPTER 2

# 1988 Measure A Program

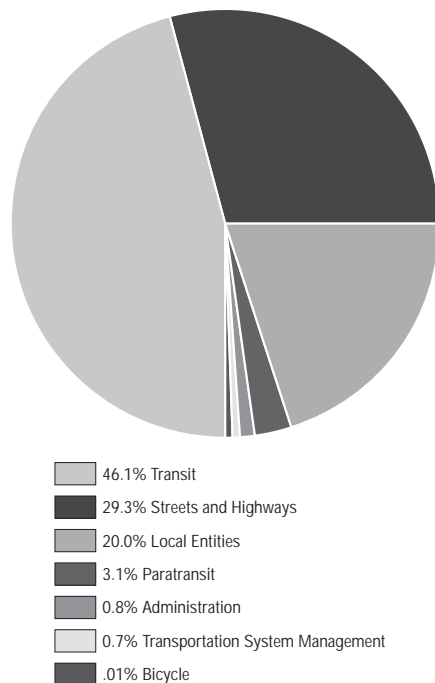


TA STRATEGIC PLAN 2009-2013

## 2.0 1988 Measure A Program

The 1988 adoption of the Measure A half-cent sales tax in San Mateo County was dedicated to generating local revenue for transportation projects and services. When the program expires at the end of 2008, it is estimated that it will have brought in \$1.2 billion in local sales-tax dollars and other earnings and an additional \$1.2 billion in leveraged state and federal dollars, for a \$2.4 billion investment in transportation infrastructure.

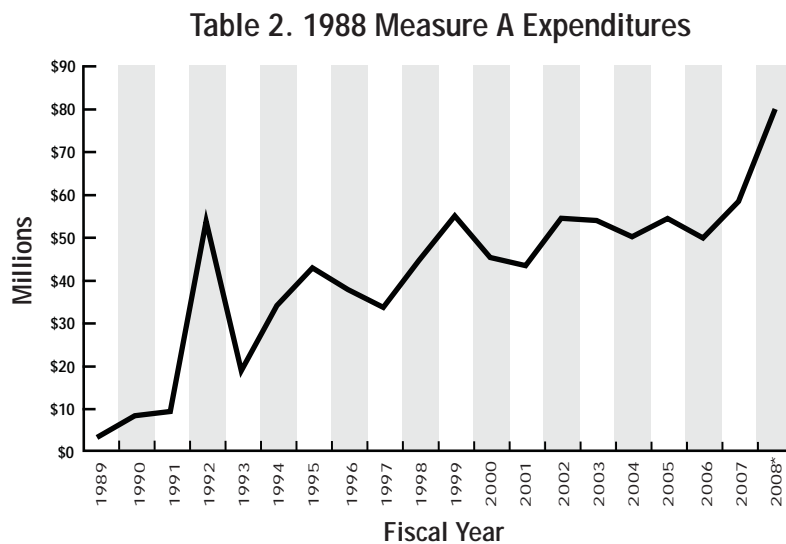
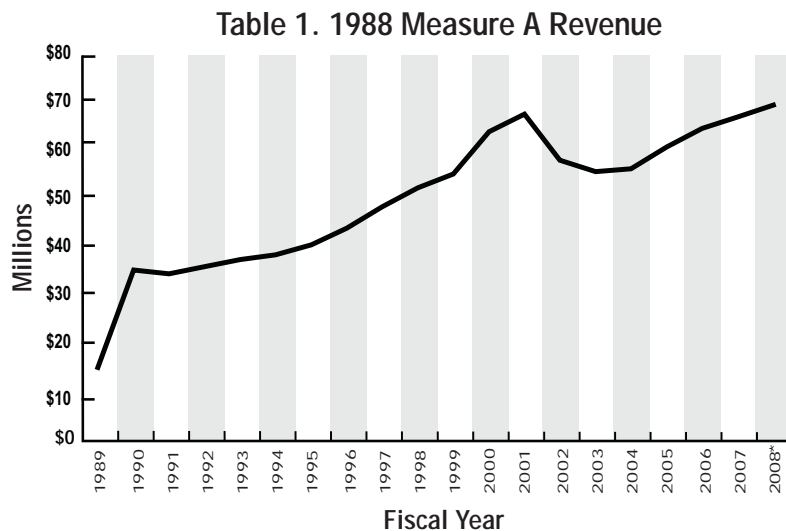
**Figure 1. 1988 Measure A Expenditure Plan**



Caltrain improvements were deemed the number one priority of the 1988 Expenditure Plan. Of the generated revenues, approximately 46 percent were slated for the transit program which included Caltrain Improvements, Grade Separations and Dumbarton Rail Corridor. Another 29 percent was designated for Streets and Highways, 20 percent for the Local Entities, 3 percent for Paratransit and 0.71 percent for Transportation System Management and Bicycles.

Significant strides have been made with the first generation of the Measure A program. Most notably, Measure A revenues contributed to the Caltrain right of way purchase in 1991 and \$14 million for the purchase of the Dumbarton right of way. This proved to be one of the most forward thinking long-term strategies for preserving transportation infrastructure in that, today, right of way purchases are extremely difficult and expensive to secure. Measure A also provided funding for Caltrain operational improvements such as the construction of passing tracks and new signal and control systems to improve service reliability and station and parking improvements in San Bruno, Belmont, San Carlos, Redwood City, Menlo Park, and San Mateo to improve safety, customer service and satisfaction. To improve safety and reduce local traffic congestion, \$148 million was allocated for the construction of nine grade separation projects which have been completed in South San Francisco, Millbrae, Belmont, San Carlos, and Redwood City to improve safety and reduce local traffic congestion. Approximately \$500 million has been expended for highway improvements such as auxiliary lanes throughout the Highway 101 corridor, Highway 92 improvements, and the Highway 101/Oyster Point Interchange in South San Francisco to improve safety and reduce freeway congestion. At a local level, approximately \$196 million was passed to local cities and the county for local street and road improvements. To supplement fixed-route operations and provide alternatives to driving, investments also have been made to fund local shuttles, paratransit and bicycle route planning.





\*2008 data is based on projections

By December 31, 2008, when the 1988 Measure A Program will expire, the TA will have expended 61 percent of the total estimated sales tax revenues and other earnings on San Mateo County transportation improvements. Prior to the expiration of the 1988 Measure A Program, the TA Board of Directors will take action on the programming of all estimated remaining sales tax funds to

projects/programs in the 1988 Measure A Program that have commenced. It should be noted that the delivery of 1988 Measure A funded projects will continue beyond the expiration of the 1988 Measure A Program, in keeping with the commitment to the voters who approved the 1988 Measure A Program.





CHAPTER 3

# 2009-2033 Measure A Program



## 3.0 2009 – 2033 Measure A Program

On January 1, 2009, the 2009 – 2033 Measure A Program will commence, continuing the generation of sales tax revenues in San Mateo County for transportation facilities, services and programs. The voter-approved Expenditure Plan sets the program categories and percentage split of the sales tax revenues to each of the program categories described below. Additionally, the guidelines and requirements contained in the Expenditure Plan are highlighted in this section.

### 3.1 2004 Expenditure Plan Goals

The goals of the 2004 Expenditure Plan Program are:

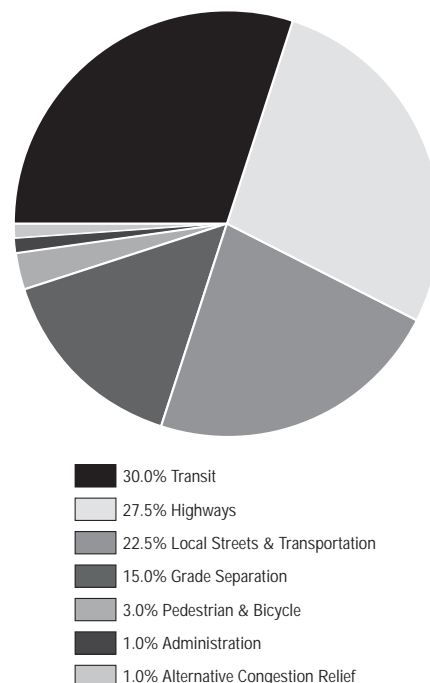
- Reduce commute corridor congestion
- Make regional connections
- Enhance safety
- Meet local mobility needs

Meeting these goals involves investment in multiple transportation modes. Funding is identified for six primary program categories: Transit, Highways, Local Streets/Transportation, Grade Separations, Pedestrian and Bicycle, and Alternative Congestion Relief programs. Each category is designated for a percentage share of the total projected revenues which are currently estimated at \$1.5 billion (in 2004 dollars) over the life of the Measure A Program, as illustrated in Figure 2 .

The 2004 Expenditure Plan outlines restrictions in the use of Measure A funds to target funding to transportation projects in San Mateo County and maximize the leveraging of other funding. The restrictions include:

- Measure A funds may not be used to replace or supplant existing funds and resources on projects
- Measure A funds may only be used for transportation facilities and services
- Measure A funds may only be used for projects within San Mateo County, with exception to the systemwide costs for Caltrain Improvements, and for Highway projects that minimally extend into adjacent counties

Figure 2. 2004 Expenditure Plan



### 3.2 Program Category Details

The Measure A Program includes six programs: Transit, Highways, Local Streets/Transportation, Grade Separations, Pedestrian and Bicycle, and Alternative Congestion Relief programs. Funding can be used for planning, design development, construction projects or operations in San Mateo County.

Table 3 lists the total estimated sales tax revenue over the life of the measure for each program category and matching funds from potential local, state and federal sources.

The definition and purpose of each program area are described in the following paragraphs. Also indicated for each program area, if applicable, are key parameters identified in the 2004 Expenditure Plan.

## Transit

The Transit Program provides funding for multiple modes of transit including Caltrain, Local Shuttles, Accessible Services, Ferry, the Dumbarton Corridor and BART.

### – Caltrain

Caltrain is a 77-mile, 32 station commuter rail system that provides service in the counties of San Francisco, San Mateo and Santa Clara. Caltrain operates 98 weekday trains with less frequent service on weekends, serving nearly 12 million customers a year. The purpose of the Caltrain program is to fund system upgrades and service expansions. Up to 50 percent of the funding can be used for operating expenses.

### – Local Shuttle

Local shuttle services are transit shuttle services provided with vehicles that are typically larger than vans and smaller than buses. The purpose of the Local Shuttle program is to meet local mobility needs and provide access to regional transit. These services are envisioned to complement fixed-route bus and rail services.

### – Accessible Services

Accessible Services are targeted for paratransit and other transportation services to accommodate people with disabilities, seniors with mobility limitations, and those who need assistance using the existing transportation services. The purpose of the Accessible Services program is to fund Americans with Disabilities Act (ADA) paratransit services, such as Redi-Wheels, and support the operating and capital needs of additional new

**Table 3. Transportation Expenditure Plan Program Categories**

Program Category	% Share	Estimated Sales Tax (in 2004 dollars)	Estimated Match (in 2004 dollars)
<b>Transit (30%)</b>			
Caltrain	16.0%	\$240.0 million	\$250 million
Local Shuttles	4.0%	\$60.0 million	\$60 million
Accessible Services	4.0%	\$60.0 million	\$228 million
Ferry	2.0%	\$30.0 million	\$92 million
Dumbarton Corridor	2.0%	\$30.0 million	\$415 million
BART	2.0%	\$30.0 million	\$120 million
<b>Highways (27.5%)</b>			
Key Congested Areas	17.3%	\$260.0 million	\$260 million
Supplemental	10.2%	\$153.0 million	\$65 million
<b>Local Streets / Transportation</b>	22.5%	\$337.5 million	\$527 million
<b>Grade Separations</b>	15.0%	\$225.0 million	\$125 million
<b>Pedestrian and Bicycle</b>	3.0%	\$45.0 million	\$25 million
<b>Alternative Congestion Relief Programs</b>	1.0%	\$15.0 million	\$15 million
<b>TOTAL</b>	<b>100.0%*</b>	<b>\$1,500 million*</b>	<b>\$2,200 million*</b>

\*Note: Includes up to 1% for Program Administration



programs for eligible seniors and people with disabilities. The ADA requires transit agencies to provide accessible services to people who are unable to use fixed-route bus or rail service.

– **Ferry**

Ferries provide transit service via waterways. The purpose of the Ferry program is to invest in cost-effective ferry services in San Mateo County, where currently, there is no ferry service. These services will increase transit options to meet daily transportation needs and also provide countywide transportation relief (and transport of emergency personnel) during times of emergencies. These services will be operated by the San Francisco Bay Area Water Emergency Transportation Authority (WETA), a regional transportation agency created by the California Legislature to develop ferry transit and waterborne emergency response services for the San Francisco Bay Area. Two ferry projects, one in Redwood City and the other in South San Francisco, have been identified in the 2004 Expenditure Plan and are the two projects that are eligible to be funded by this program.

– **Dumbarton Corridor**

The Dumbarton Corridor, which connects the Peninsula to the East Bay, has been identified as a key corridor for future commuter rail service. This corridor provides a critical component of establishing a regional rail network as identified in the Metropolitan Transportation Commission (MTC) Regional Rail Plan. Building on the investment of purchasing the Dumbarton Corridor right of way with funding from the 1988 Measure A Program, the purpose of this program is to fund station facilities and rail corridor enhancements in East Palo Alto, Menlo Park and Redwood City.

The Dumbarton commuter rail project, which is overseen by the Dumbarton Rail Corridor Policy Advisory Committee (DRCPAC) and project managed by Caltrain, is currently at 10 percent design and in the environmental clearance phase. Once these tasks are complete, the DRCPAC will focus on solidifying the funding plan before defining specific projects to be funded by this program.

– **Bay Area Rapid Transit District (BART)**

BART is a heavy rail system that operates throughout the counties of San Francisco, San Mateo, Alameda and Contra Costa. BART serves more than 362,000 riders on a typical weekday on its network of 104 miles and 43 stations. The purpose of this program is to fund capital investments and operating expenditures associated with the San Mateo County BART extension, which was completed in 2003.

As outlined in an agreement between BART, SamTrans and the TA, 2 percent of Measure A sales tax revenues will be allocated to BART on an annual basis to fund a portion of the BART operating costs in San Mateo County. Within the general guidelines of the Measure A Program, specific projects to be funded by this program are to be defined by BART consistent with and within the parameters of the agreement between BART, SamTrans and the TA.

## Highways

The purpose of this program is to reduce congestion on roadways within San Mateo County. This program is divided into two categories: Key Congested Areas are focused on removing bottlenecks in the most congested highway commute corridors; and Supplemental Roadways are focused on reducing congestion and improving throughput along secondary commute corridors.

### – **Key Congested Areas**

The 2004 Expenditure Plan allocates a specified amount of sales tax revenue to five key congested corridors in San Mateo County. Below is the list of eligible projects as identified in the 2004 Expenditure Plan:

#### • **Highway 280 North Improvements**

- *Reconstruct I-280/Route 1 Interchange (Daly City)*
- *Construct Auxiliary Lanes between I-380 and Hickey Boulevard (Daly City, South San Francisco, San Bruno)*

#### • **Coastside Highway Improvements**

- *Route 1/San Pedro Creek Bridge Replacement (Pacifica)*
- *Route 1/Manor Drive overcrossing improvement and widening (Pacifica)*
- *Route 1 and 92 safety and operational improvements (within and in the proximity of Half Moon Bay)*

#### • **Highway 92 Improvements**

- *Auxiliary lanes and interchange improvements between I-280 and the San Mateo Hayward Bridge (San Mateo County, Foster City)*

#### • **Highway 101 Mid-county Improvements**

- *Reconstruction of the Highway 101-Broadway Interchange (Burlingame)*
- *Modification of the Highway 101/Peninsula Avenue Interchange (San Mateo, Burlingame)*
- *Operational improvements on Highway 101 from Hillsdale to Route 92 (San Mateo)*

#### • **Highway 101 South Improvements**

- *Reconstruct the Highway 101/Woodside Road Interchange (Redwood City)*
- *Highway 101 improvements between Highway 84 and the Santa Clara County line and access improvements to the Dumbarton Bridge (Redwood City, Menlo Park, East Palo Alto)*

### – **Supplemental Roadways**

The 2004 Expenditure Plan includes a partial list of specific projects eligible to receive Measure A funding. Other projects (not listed in the plan) can be considered. Below is the partial list of candidate projects as identified in the 2004 Expenditure Plan:

- **Route 35 (I-280-Sneath Lane) widening (San Bruno)**
- **US 101/Produce Avenue Interchange (South San Francisco)**
- **Route 92 (I-280/Route 35) truck climbing lane (San Mateo)**
- **Willow Road adaptive signal control system (Menlo Park)**
- **US 101 (Sierra Point Parkway – SF/SM County Line) auxiliary lanes (South San Francisco, Brisbane)**
- **Geneva Avenue extension (Daly City, Brisbane)**
- **I-280/John Daly Boulevard Overcrossing (north side) widening (San Bruno)**
- **Junipero Serra Boulevard Improvements (Daly City, Colma, South San Francisco)**
- **US 101/Candlestick Point Interchange (Brisbane)**
- **US 101 (Sierra Point Parkway – San Bruno Avenue) auxiliary lanes (Brisbane, South San Francisco)**
- **I-280/I-380 local access improvement (San Bruno)**
- **Highway 101/Sierra Point Pkwy Interchange replacement and Lagoon Way extension (Brisbane)**
- **Triton Drive widening (Foster City)**
- **Sand Hill Road signal coordination (Menlo Park)**
- **Woodside Road widening (US 101-El Camino Real) (Redwood City)**

## Local Streets and Transportation

The purpose of this program is to provide funding to the 20 cities and the County of San Mateo for the improvement and maintenance of local transportation facilities and services. This program provides money to local jurisdictions based on the following formula: 50 percent by population and 50 percent by the number of road miles within the jurisdiction. Annually, the TA will update the road miles and population figures based on California Department of Transportation and Department of Finance data. Table 4 below summarizes the estimated allocation and funding over the next 25 years (in 2004 dollars).

**Table 4. Estimated Annual Distribution to San Mateo County and Cities**

Local Jurisdiction	Allocation (%)	Estimated Funding (\$2004)
Atherton	1.886	\$ 6,365,250
Belmont	3.543	\$ 11,957,625
Brisbane	0.818	\$ 2,760,750
Burlingame	4.206	\$ 14,195,250
Colma	0.299	\$ 1,009,125
Daly City	10.413	\$ 35,143,875
East Palo Alto	3.215	\$ 10,850,625
Foster City	3.364	\$ 11,353,500
Half Moon Bay	1.596	\$ 5,386,500
Hillsborough	3.000	\$ 10,125,000
Menlo Park	4.851	\$ 16,372,125
Millbrae	2.917	\$ 9,844,875
Pacifica	5.174	\$ 17,462,250
Portola Valley	1.488	\$ 5,022,000
Redwood City	9.612	\$ 32,440,500
San Bruno	5.034	\$ 16,989,750
San Carlos	4.271	\$ 14,414,625
San Mateo	11.797	\$ 39,814,975
S. San Francisco	7.949	\$ 25,815,375
Woodside	1.683	\$ 5,680,125
San Mateo Co.	13.184	\$ 44,496,000

## Grade Separation

The Grade Separation program involves eliminating at-grade railroad crossings. This can be done by raising or lowering roads and/or train tracks at different elevations. The purpose of this program is to provide funding for the construction or upgrade of grade separations along the Caltrain and Dumbarton rail lines in San Mateo County to improve safety and relieve local traffic congestion. The rail crossings to be considered for Measure A funding are listed in the 2004 Expenditure Plan and are located in the cities of South San Francisco, San Bruno, Millbrae, Burlingame, San Mateo, Redwood City, Atherton, East Palo Alto and Menlo Park.

## Pedestrian and Bicycles

Bicycling and walking are sustainable forms of transportation. The purpose of this program is to fund specific projects to encourage and improve bicycling and walking conditions. Qualified expenditures include paths, trails and bridges over roads and highways. The 2004 Expenditure Plan includes a partial list of eligible bicycle and pedestrian projects which are listed below. Other projects will be considered.

- Route 1/Santa Rosa Avenue Pedestrian Overcrossing (Pacifica)
- Route 1 pedestrian/bike trail from Montara through Half Moon Bay (San Mateo County, Half Moon Bay)
- Route 35/Route 1 pedestrian/bike overcrossing (Daly City)
- Millbrae Avenue/US 101 pedestrian/bike overcrossing (Millbrae)
- Hillcrest Boulevard/US 101 pedestrian/bike overcrossing to Bay Trail (Millbrae)
- US 101 near Hillsdale Boulevard pedestrian/bike overcrossing (San Mateo)
- Ralston Avenue/US 101 pedestrian/bike overcrossing (Belmont)
- Willow Road/Bayfront Expressway pedestrian/bike tunnel upgrade (Menlo Park)
- Willow Road/US 101 pedestrian/bike overcrossing (Menlo Park)
- Portola Road pedestrian/bike path paving (San Mateo County)

## **Alternative Congestion Relief**

The Alternative Congestion Relief program promotes transit and non-traditional methods of commuting to reduce reliance on the automobile and use of Intelligent Transportation Systems (ITS) to promote efficient use of the transportation network. Commute alternatives receive 0.8 and ITS projects receive 0.2 percent of the Alternative Congestion Relief funds. Example projects include carpool services, transit subsidies, car sharing and telecommuting. The program also utilizes information technology to assist in efficient use of the transportation network. Example projects include travel time signage on highways, accident alerts and rerouting information. This program is essential in completing a multimodal program to maximize transportation options and efficiencies.

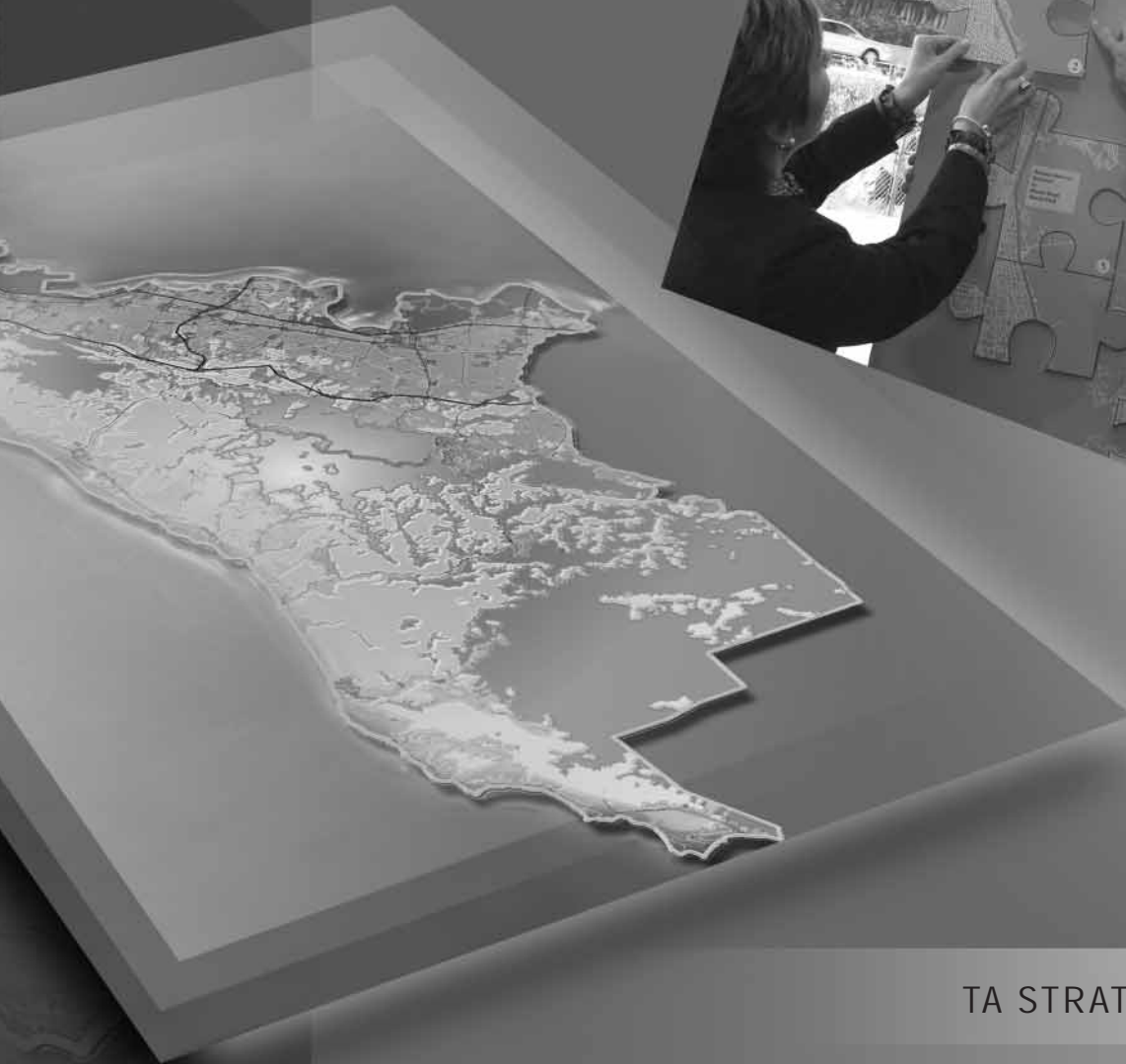
Table 5. Program Category Details

Program Category	Description	Purpose	Project Parameters
<b>Transit</b>			
Caltrain	Existing commuter rail system providing train service in San Francisco, San Mateo and Santa Clara Counties	Upgrade and expand Caltrain services in San Mateo County; Fund systemwide improvements and safety	Up to 50% funding for operations
Local Shuttles	Transit services provided with vehicles that are typically larger than vans and smaller than buses	Meet local mobility needs and provide access to regional transit	n/a
Accessible Services	Targeted transportation services for people that have special mobility needs	Provide paratransit and other transportation services to eligible seniors and people with disabilities	n/a
Ferry	Transit service provided by vessels on waterways	Establish ferry services in San Mateo County	For services in Redwood City and South San Francisco
Dumbarton Corridor	A key corridor connecting the East Bay with the Peninsula identified for future commuter rail service	Construct stations and rail enhancements in East Palo Alto, Menlo Park and Redwood City	n/a
BART	Existing heavy rail system providing train services in San Francisco, San Mateo, Alameda and Contra Costa Counties	Maintain and operate BART extension to San Mateo County	Projects to be programmed by BART
<b>Highways</b>			
Key Congested Areas	Highways in San Mateo County	Reduce congestion and increase throughput on highways	Projects to be selected from eligible project list
Supplemental	Local, collector, arterial, state route roadways in San Mateo County	Reduce congestion and increase throughput on roadways	n/a
<b>Local Streets / Transportation</b>	Transportation services, roadways owned and maintained by the cities and County of San Mateo	Improve and maintain local transportation facilities and services	Projects to be programmed by cities and/or county
<b>Grade Separations</b>	Eliminate at-grade railroad crossings	Improve safety and relieve local traffic congestion	n/a
<b>Pedestrian and Bicycle</b>	Pedestrians and bicycle facilities	Encourage walking and bicycling	n/a
<b>Alternative Congestion Relief Programs</b>	Commute alternatives and Intelligent Transportation Systems (ITS)	Efficiently use transportation network and reduce reliance on automobiles	0.8 percent is for commute alternatives and 0.2 percent for ITS projects





# Planning Process



## 4.0 Planning Process

Public involvement is critical to the success of the 25-year (2009 – 2033) Measure A Program. Building on the outreach involved with the conception of the Measure A Program and generation of the 2004 Expenditure Plan, the development of this Strategic Plan included direction from policy-makers and input from technical experts, community leaders and the public-at-large.

### 4.1 Participants

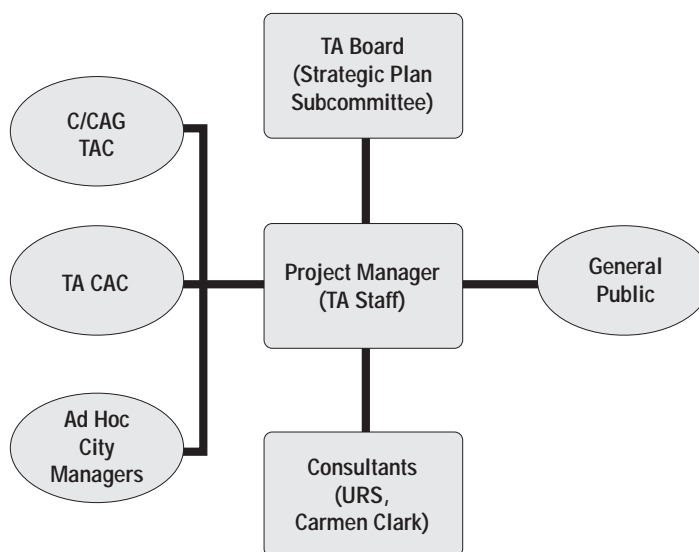
The TA Board convened a subcommittee to oversee the development of the Strategic Plan and execution of a sound outreach strategy. Three key groups helped shape the planning process and outreach approach: the TA Citizens Advisory Committee, the Ad-hoc Committee of City Managers specifically formed for this purpose, and the City/County Association of Governments Technical Advisory Committee comprised of city public works directors, engineers, and planners. The public also informed the process to ensure a strong connection between policy decisions and the needs of San Mateo County communities as expressed through the approved Measure A Expenditure Plan.

### 4.2 Public Outreach

TA staff made a special effort to solicit input from the public as a way to educate them about Measure A and the TA, including the positive impact of the half-cent sales tax on countywide mobility over the last 20 years. Given that the Strategic Plan is anchored to the 2004 Expenditure Plan, which was developed with public input, it was essential to remind the public of what is included in the 2004 Plan and the purpose of the Strategic Plan. Public input was needed to develop two key components of the Strategic Plan: criteria for project evaluation and prioritization; and monitoring programs and performance measures that would be used to ensure efficient use of Measure A money.

Public outreach was conducted in two phases between July and September. The first phase focused on existing stakeholder groups representing a wide range of perspectives. This phase provided the opportunity to go deeper into specific interest areas, while also informing the second phase of outreach to the general public through community meetings. The public outreach effort solicited input on types of transportation projects, evaluation criteria, and performance measures. In order to publicize the community meetings, notices were sent to 46 print, five radio and 10 television media outlets, as well as several organizations and community groups.

Figure 3. Participants



During Phase I, meetings were held with the following stakeholder groups:

- C/CAG Bike and Pedestrian Advisory Committee
- C/CAG Congestion Management and Environmental Quality Committee
- Caltrain Citizens Advisory Committee
- Committee for Green Foothills
- Menlo Park Transportation Management Program
- Peninsula Traffic Congestion Relief Alliance
- SamTrans and Caltrain Accessibility Advisory Committees
- SamTrans Citizens Advisory Committee
- San Mateo County Economic Development Association
- San Mateo County Paratransit Coordinating Council

During Phase II, four public-at-large meetings were held in:

- Pacifica (Coastside)
- Burlingame (Central county)
- Daly City (North county)
- Redwood City (South county)

Key comments received from the stakeholders and the public emphasized the importance of particular criteria that should be used in evaluating and prioritizing projects and performance measures. They included:

- Evaluating the project readiness as it relates to the planning process that the project was subject to as well as the funding commitment to advance the project
- Considering geographical equity when looking at the investment decisions for the whole Measure A Program
- Measuring the effectiveness relating the projects costs to it benefits such as congestion relief, system connectivity, improved safety and customer satisfaction

The public also discussed types of projects they thought were important to be considered for Measure A funding. Input included congestion relief roadway improvements, more shuttle services to Caltrain and customer service innovations. A complete summary of the input gathered from the outreach process can be found in Appendix A.

The draft plan was released October 20 for a two-week public comment period. Comments included concerns regarding pedestrian and bicycle program funding, the eligibility of specific projects to receive Measure A funding, and questions regarding the process by which projects will be reviewed. A complete summary of the comments received on the draft Strategic Plan during the public comment period can be found in Appendix B.

The common theme from the public was the desire for an efficient transportation network that maximizes their transportation options, meets their travel needs and efficiently uses Measure A funds.





# Programming and Allocations Guidelines





## 5.0 Programming and Allocations Guidelines

This chapter defines the policy framework that will guide fund programming and allocation processes and decisions. There are three subsections in this chapter. Section 5.1 describes the participants involved in the Measure A Program and their respective roles and responsibilities. Section 5.2 describes the programming and allocation process for non-competitive programs (projects with automatic entitlements to annual allocations). Section 5.3 describes the programming and allocation process for competitive programs (new projects that will be proposed through an application process).

### 5.1 Participants and Responsibilities

The Measure A Program involves four key participants: Project Initiator, Project Sponsor, Project Manager/Operator and the Transportation Authority.

*Project Initiators* can be any person or entity that develops a project idea. In order for the project to be considered for Measure A funding, the Project Initiator will need to garner the support of an eligible Project Sponsor to submit the project to the TA for funding consideration. The *Project Sponsors* are the entities that interface with the TA. They are identified in the 2004 Expenditure Plan and listed above.

Project Sponsors are responsible for working with the Project Initiators and submitting competitive projects to the TA for funding consideration. Project Sponsors are also responsible for project development and implementation. They can manage or operate the projects themselves or they can identify a *Project Manager or Operator* and contract out for those services. The *Transportation Authority* is responsible for administering the Measure A Program.

Table 6. Participants and Responsibilities

Participant	Responsibilities
Project Initiator (All eligible)	- Recommend Project to Sponsor
Project Sponsor (Identified in Expenditure Plan)	- Submit Funding Request to the TA - Solidify Funding Plan - Develop Project - Implement Project - Submit Monitoring Reports - Sign Funding Agreements
Project Manager/Operator (To be identified by Project Sponsor)	- Plan Project - Engineer Project - Construct Project - Operate Services
Transportation Authority	- Evaluate and Prioritize Projects - Program and Allocate Funds - Monitor Projects / Programs - Sign Funding Agreements

Table 7. Project Sponsors

Program Category	Project Sponsors
<b>Transit</b>	
Caltrain	SamTrans, Joint Powers Board
Local Shuttles	SamTrans
Accessible Services	SamTrans
Ferry	South San Francisco, Redwood City
Dumbarton Corridor	SamTrans
BART	SamTrans
<b>Highways</b>	Caltrans, Cities, San Mateo County
<b>Local Streets / Transportation</b>	Cities, San Mateo County
<b>Grade Separations</b>	SamTrans, Cities, San Mateo County, Joint Powers Board
<b>Pedestrian and Bicycle</b>	Cities, San Mateo County
<b>Alternative Congestion Relief Programs</b>	Cities, San Mateo County

## 5.2 Non-competitive Programs and Projects

There are program and projects within the Measure A Program that are not subject to a competitive TA process. Qualified programs are those that have committed funding designated in the 2004 Expenditure Plan or from a previously executed funding agreement. Qualified projects include existing transit services that are currently being funded with 1988 Measure A sales tax proceeds.

### – Qualified Programs and Projects

There are four programs and projects that are non-competitive within the 2009-2033 program:

- Transit: BART within San Mateo County
- Transit : Accessible Services
- Transit: Shuttles
- Local Streets and Transportation

For the *Transit: BART within San Mateo County* program, as outlined in an agreement between BART, SamTrans and the TA, 2 percent of Measure A sales tax revenues will be allocated to BART on an annual basis.

For the *Transit: Accessible Service* program, funding is committed to the continuation and expansion of para-transit services operated by SamTrans as Redi-Wheels. Other supplemental services to be funded within this program have not yet been identified and will be considered as new projects subject to the guidelines described in Section 5.3.

For the *Transit: Local Shuttles* program, funding is committed to existing shuttle services that have been funded by the 1988 Measure A Program subject to acceptable performance. New shuttle services to be funded within this program have not yet been identified and will be considered as new projects subject to the guidelines described in Section 5.3.

For the *Local Streets and Transportation* program, the TA is committed to providing 22.5 percent of Measure A funding to the cities and county of San Mateo for maintenance and improvements of local transportation facilities. The specific amount for each entity is determined based on the following formula: 50 percent by population and 50 percent by the number of road miles within each jurisdiction. Annually, the TA will update the road miles and population figures based on California Department of Transportation and Department of Finance data.

– **Process**

The programming and allocations process for projects with committed funding are as follows:

1. *Staff Recommendation*

Prior to the beginning of each fiscal year (July 1 – June 30), the TA will estimate the amount of projected revenues available for the non-competitive programs and projects. Based on these estimates, the TA staff will make a programming and allocation recommendation to the Board.

2. *TA Board Consideration*

The Board will consider the recommendations as part of the annual TA budgeting process. Board approval will allow staff to allocate the money and complete the annual funding commitment.

3. *Funding Agreements*

Prior to receiving any disbursements of funds, the receiving entity will need to execute a funding agreement with the TA. The standard funding agreement outlines the understanding between the funding recipient and the TA regarding the amount of funding, purpose of the funds, payment terms, reporting requirements, and other obligations connected to the receipt of funding.

4. *Progress Report Submittals*

Project Sponsors will be required to provide annual progress reports to monitor and document appropriate use of funds. Progress reports also will be used for the Local Shuttles program to measure performance for continued receipt of Measure A funding.

## 5.3 Competitive Programs

Competitive programs are those in which new projects proposed within each program category will compete for Measure A funding. The competitive programs include:

- **Transit**

- *Caltrain*
- *Local Shuttles (Not including 1988 Measure A funded services)*
- *Accessible Services (Not including paratransit services)*
- *Ferry*
- *Dumbarton Rail*

- **Highways**

- **Grade Separations**

- **Pedestrian and Bike Facilities**

- **Alternative Congestion Relief Programs**

The process for receiving funding for new projects is:

1. *Call for Projects*

The TA will issue a Call for Projects by program requesting Project Sponsor(s) to submit projects for Measure A funding consideration. The frequency of the Call for Projects will differ by program and range from one-time, annual, to multiple over the 25-year duration of Measure A. As indicated in the 2004 Measure A Expenditure Plan, the TA will allocate and fund projects in the Accessible Services program category annually. The specific funding cycles for the other programs are to be determined based on funding availability, program need and program readiness.

Within a given timeframe, the Project Sponsor(s) responding to the Call for Projects will need to complete a project application to compete for Measure A funds. A procedures manual will be made available to assist the Project Sponsors in completing the application. The application will require the following information:

- Identification of Project Initiator, Project Sponsor, Project Manager/Operator and other participants in the project
- A compelling project justification and project effectiveness assessment
- A description of the planning process in developing the project and support letters
- Project assessment based on criteria established in the call for projects
- Project scope, schedule and budget
- A reasonable capital and operating funding plan
- Establishment of baseline performance measures reporting conditions
- Supplemental information tailored to each program category

## 2. Project Evaluation and Prioritization

The TA will assemble Project Review committees to evaluate project applications and proposals. The review will be based on criteria outlined in the Call for Projects. There are five categories of criteria that will be considered for project evaluation and selection: Need, Policy Consistency, Readiness, Effectiveness and Other. Example criteria are listed in Table 8.

As a first step, the *Need* for a project must be established to be considered for funding. With that basis, the project will be reviewed for *Policy Consistency*. Is the project consistent with the goals of the 2004 Expenditure Plan and the Countywide Transportation Plan? Does it support the policies of the sponsoring city's General Plan and Specific Plans? How does this project contribute to a larger public goal?

*Readiness* measures the level of public and stakeholder support and viability of the project to be funded and implemented. Key indicators are the quality of planning processes that were engaged to define the project, level of support from key stakeholders and the public and availability of resources to design, implement and fund the project.

**Table 8. Project Selection and Prioritization Categories and Example Criteria**

Need	Policy Consistency	Readiness	Effectiveness	Other
Project Justification	2004 Expenditure Plan Countywide Transportation Plan Regional and Local Plans	Planning Process Stakeholder Support Funding Commitment	Congestion Relief System Connectivity Ridership Safety Cost Reliability Funding Match	Economic Development Geographic Equity Environmental Impact Support Transit-Oriented Development

*Effectiveness* criteria will be used to evaluate the performance merits of the project. If the TA invests in a major highway improvement, how much congestion will be relieved? If it invests in a grade separation, how much does it improve safety and reduce local traffic congestion? If the TA invests in a pedestrian/bike bridge, how many pedestrians and bicyclists are going to use it? If it invests in a new shuttle service, how many new riders are going to use it? Effectiveness criteria will help measure benefits against the cost for building and implementing these projects.

*Other Criteria* captures additional critical considerations in evaluating projects. To what extent does the project support economic development? What is the project's impact on the environment? Can the impacts be mitigated? Does the project support transit-oriented development? Are land use and transportation decisions linked together to achieve efficient transportation options? And lastly, does the project contribute towards geographical equity for the total Measure A program? The Measure A program is a countywide effort that must take into consideration investments throughout the county. It should be noted that the 2004 Expenditure Plan specifies that projects which support transit-oriented development will be given priority.

### *3. Staff Recommendation*

Based on review by the Project Review Committee, staff will develop a project funding recommendation for Board consideration. The recommendation will be clearly anchored to the program-specific project evaluation and prioritization criteria.

### *4. TA Board Approval*

The TA Board will take action on the programming of Measure A funding. This ensures commitment to the project. In a separate action, the Board will allocate funding as part of the TA's annual budget approval process. This action ensures timely availability of funds.

### *5. Funding Agreements*

Prior to receiving any disbursements of funds, the receiving entity will be required to execute a funding agreement with the TA. The standard funding agreement outlines the understanding between the funding recipient and the TA regarding the amount of funding, purpose of the funds, payment terms, reporting requirements and other obligations connected to the receipt of funding.

### *6. Monitoring Report Submittals*

In order to ensure appropriate and efficient use of Measure A funds, the Project Sponsors will be required to submit monitoring reports.



– **Capital Projects**

For capital projects, Project Sponsors will be required to submit monitoring reports during design development and construction. The content of the reports will be focused on project scope, schedule and budget. Post-construction, the TA will monitor the use and effectiveness of the projects. This information will be used to inform future investment decisions.

**Table 9. Capital Project Monitoring Program**

	Project Development	Post-construction
Type of Monitoring	Active	Education
Performance Measures	Scope Schedule Budget	Usage  Effectiveness
Responsible Party	Project Sponsor	TA

– **Operating Projects**

For operating projects, Project Sponsors will be required to submit performance reports. Sample performance measures include service effectiveness, service quality and customer satisfaction. This monitoring program will assist the TA in justifying the continued funding for approved operating projects. If performance measures indicate less than acceptable performance, the TA will work with the Project Sponsor to set up a mitigation program and achieve improvements as a condition of continued funding from the Measure A Program.

**Table 10. Operating Project Monitoring Program**

Example Performance Measures	- Matching Fund - Effectiveness - Service Quality - Customer Satisfaction - Project Specific TBD
Responsible Party	Project Sponsor





# Fund Management



## 6.0 Fund Management

In addition to defining the process for funding allocation and programming, the TA is charged with responsibly managing the public's sales tax revenues and leveraging funds in order to achieve the goals of the 2004 Measure A Expenditure Plan. The TA will focus on programming and allocating funds to projects as money becomes available as well as maximizing matching funds to increase the total investment in San Mateo County transportation infrastructure and services. The TA will treat requests for advancement of funds as exceptions to the rule. Advancement of funds must be justified with compelling reasons that offset the impact of financing fees and/or timing of funds to other projects.

### 6.1 Measure A CIP and Funding Cycles

The TA will develop a Capital Improvement Plan (CIP) to manage the influx of revenues and availability of matching funds with anticipated project expenditures. The CIP will serve as a basis for determining the specific Call for Projects cycle for each program category. The Call for Projects cycle may differ for each program category and

range from one-time, annual to multiple over the 25-year duration of Measure A. Annual allocations are scheduled to be made to the Transit: Accessible Services, Transit: BART within San Mateo County, Transit: Shuttles, and Local Streets and Transportation program categories. With the identification of prioritized projects and continued monitoring of the local and countywide short- and long-term needs and program readiness, the CIP will be fine tuned on an on-going basis.

### 6.2 Matching Funds

In order to maximize investment in transportation projects, the ability for Project Sponsors to leverage funds will be a key criterion in the evaluation and prioritization of projects.

#### – Existing Sources

Navigating through the funding network and securing matching funds is complicated. The following provides a brief summary of the existing federal, state and local fund sources that can be leveraged with Measure A funding. Regional funds are considered as local funds.

Table 11. Federal Funding Sources (in no particular order)

Funding Source	Purpose	Administrator
FTA Section 5307	Purchase of buses, trains, ferries, vans, and other capital improvement, and Americans with Disabilities Act (ADA) required Paratransit Service	FTA/MTC
FTA Section 5309 – Fixed Guideways	Purchase of rail cars, ferries and equipment on fixed-guideway transit services	FTA/MTC
FHWA – STP	Roadway or transit rehabilitation, transportation system and operational improvements, highway construction, transit facilities, ITS projects, intermodal port facilities	FHWA/ MTC
FHWA – CMAQ	Transportation projects that improve air quality and relieve congestion	FHWA/MTC
FTA – JARC	Projects and services designed to transport low-income persons to work; projects to move people to suburban job centers	FTA/MTC
FTA - New and Small Starts	New rail lines or extensions; new Bus Rapid Transit (BRT) fixed guideway, other BRT	Congress
FTA – Elderly and Disabled	Purchase of paratransit vans and related equipment	California Transportation Commission
FTA – New Freedom Program	Fund public transit alternatives beyond those required by ADA	FTA/MTC
FTA - Bus and Bus Facility	Purchase of buses and improvements to bus facilities	Congress

– **Federal**

Highlighted here are key federal sources of funding: Federal Transportation Act Section 5307; Federal Transportation Act Section 5309, Federal Surface Transportation Program (STP), Federal Congestion Mitigation and Air Quality Improvement Program (CMAQ), Federal Transportation Administration Job Access and Reverse Commute Program (JARC), Federal Transportation Administration New and Small Starts, Federal Transportation Administration Elderly and Disabled, Federal New Freedom Program, and Federal Transportation Administration Bus and Bus Facility. Table 11 identifies the purpose and administrator for each funding source.

– **State**

Highlighted here are key state sources of funding: State Highway Operation and Protection Program, Traffic Congestion and Relief Program, State Transportation Improvement Program, State Transit Assistance, Safe Routes to School, Bicycle Transportation Account and Proposition 1B Infrastructure Bond. Table 12 identifies the purpose and administrator for each funding source.

– **Local**

Highlighted here are key regional/local sources of funding: Transportation Development Act, County Transportation Sales Tax revenues, Gasoline Tax Subventions, Regional Bridge Tolls, Vehicle License Fees, and Developer Impact Fees, and Transportation Fund for Clean Air. Table 13 identifies the purpose and administrator, for each funding source.

– **Potential New Sources**

With escalating project costs and limited availability of transportation funding, Project Sponsors are encouraged to explore and identify non-traditional sources of funding, which is not without significant challenges. Identifying traditional and non-traditional funding sources is essential to meeting the transportation needs of the future and the growing need for transportation investments.

Non-traditional sources of funding include innovative financing, establishing new funding sources and developing public-private partnerships.

**Table 12. State Funding Sources (in no particular order)**

Funding Source	Purpose	Administrator
State Highway Operation and Protection Program	State highway rehabilitation projects	Caltrans
Traffic Congestion and Relief Program	Streets and highways rehabilitation and specific list of projects included in state statutes	California Transportation Commission
State Transportation Improvement Program	Roadway and transit capital improvement projects, road rehabilitation, interregional improvements	Caltrans/ MTC
State Transit Assistance	Transit and Paratransit operating assistance and regional transit coordination	Transit operators
Safe Routes to School	Infrastructure projects and programs that promote walking and bicycling near schools	
Bicycle Transportation Account	Bicycle path, lane or route construction and maintenance, lockers, racks on transit vehicles, planning, and safety education	Caltrans
Proposition 1B	General obligation bonds for various programs: transportation corridor improvements, trade infrastructure and port security projects, school bus retrofit and replacement, state transportation improvement program, transit and passenger rail improvements, state-local partnership transportation projects, transit security projects, local bridge seismic retrofit projects, highway-railroad grade separation and crossing improvement projects, state highway safety and rehabilitation projects, and local street and road improvement, congestion relief, and traffic safety	California Transportation Commission

- **Traditional and Innovative financing:** Mechanisms to creatively finance major infrastructure projects by bonding or borrowing against future anticipated revenue streams. This may include Transportation Infrastructure Finance and Innovation Act of 1998 (TIFIA, a federal credit program), lease-financing of transit vehicles, and finding ways to use future funding sources as collateral.
- **New funding sources:** To increase the overall funding pool, it is necessary to generate additional dollars. Support for new sources and legislation such as high-occupancy toll lanes, additional vehicle license fees, indexing of the state gas tax, tax assessment districts, and pursuit of a regional gas tax are some of the potential new sources and may require legislative action.
- **Public-Private Partnerships (PPP):** PPPs are being suggested as potential solutions to funding shortfalls for the completion of projects. Generally, it is a partnership between a governmental entity and a private business venture in which the cost of a project may be partially funded by the PPP in exchange for a return to the private investors from a portion of the revenues generated. Many types of PPPs exist and most approaches are tailored to specific projects.

### 6.3 Special Circumstances for Advancing Funds

There will be special circumstances when Project Sponsors need to request Measure A funding beyond what is readily available. For justified special circumstances, the TA has the authority to make funds available earlier than the collection of revenues. The overriding criteria to be used in the TA's deliberation of advancing funds include:

- **Urgency**
  - A project that calls for immediate construction to address a public safety need
  - A project that can realize significant cost savings if it's coupled with another project to be constructed in an earlier timeframe
  - Loss of funding sources if the project is not constructed within a certain time frame
- **Impact to the Measure A Program**
  - Potential of the funding advance delaying other projects
  - Financial fees associated with advancing funds

When a special circumstance arises, the TA Board will consider the request based on criteria identified above. If a decision is made to advance funds, specifics about exactly how the funds will be advanced will be determined at that time.

Table 13. Local/Regional Funding Sources (in no particular order)

Funding Source	Purpose	Administrator
Transportation Development Act	Transit capital and operating improvements for Transit and Paratransit (Articles 4, 4.5 and 8) and Bicycle and Pedestrian (Article 3)	MTC
Other County Sales Tax Revenues	Transportation improvements per the guidance from sales tax statutes	Counties
Gasoline Tax Subventions	Local streets and road maintenance and rehabilitation	Cities and Counties
Regional Bridge Tolls	Projects that mitigate and relieve traffic congestion on the bridges (AB 664, 2%-5%, Regional Measure 2)	MTC
San Mateo County \$4 Motor Vehicle License Fee	Management of traffic congestion and stormwater pollution	C/CAG
Developer Impact Fees	Cost to local government of a new development, including roads, sidewalks, sewers, and utilities	Local Governments
Transportation Fund for Clean Air	Funds regional competitive and county funding categories. Programs include: TFCA Regional Fund, Bicycle Facility Program, Smoking Vehicles Program, Spare the Air, Vehicle Buy Back, and TFCA County Program Manager Fund.	Bay Area Air Quality Management District (BAAQMD)





# Next Steps





## 7.0 Next Steps

### From Strategic Plan to Project Funding

After adoption of the Strategic Plan, the TA will focus on:

- **Developing a Measure A Capital Improvement Plan (CIP)**
- **Developing a Procedures Manual and Call for Projects**
- **Issuing Call for Projects**
- **Selecting Projects**

The critical first step for the TA will be to develop a CIP based on estimated sales tax revenue, prior funding commitments, countywide short- and long-term needs, and anticipated program expenditures. The initial CIP will be based on forecasts of revenues and projects to be undertaken. As a dynamic living document, it will be refined each year as projects are selected for funding.

Based on the CIP, TA staff will establish the funding cycles for the Call for Projects. Included in the Call for Projects will be the development of program-specific criteria to be used in evaluating and prioritizing the projects and the obligations associated with monitoring the projects. The TA will make available a Procedures Manual to instruct Project Sponsors through the funding request process.

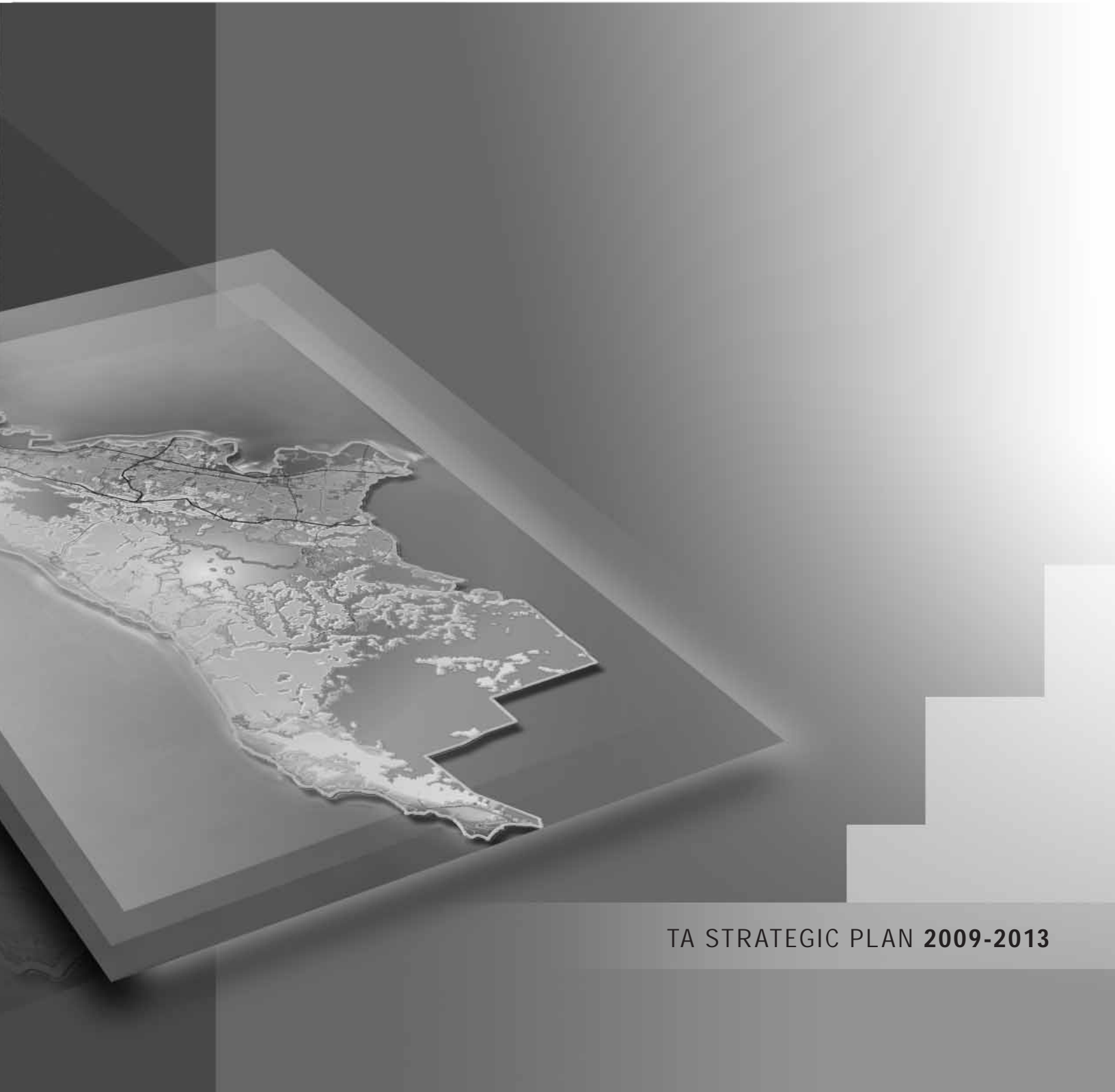
After the collection of project proposals, projects will be reviewed by project evaluation committees to inform the evaluation and prioritization of projects. Recommendations will ultimately be presented to the Board for fund programming and allocation actions, leading to funding agreements and the advancement of approved projects that fulfill the goals of the Measure A Program.

### Next Strategic Plan Update

The Strategic Plan will be updated a minimum of every five years. The next update will reflect the results of the Call for Projects and the projects prioritized for Measure A funding. Public input will continue as the program matures as it has been instrumental in the development and success of the TA Program.



# Appendices



# Appendix A: Public Outreach Comments

## Phase 1: Stakeholder Outreach Comments

### Focused Interest Area: Transportation Demand Management

Topics	Comments	Response
Improve connectivity and customer service. Support new strategies.	Ensure projects have a customer service oriented approach.	Making regional connections and meeting local mobility needs are primary goals of the Measure A program. These factors also will be addressed in the "need" and "effectiveness" project evaluation criteria categories and "customer satisfaction" monitoring program performance measure. Recommended projects will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Improve communication systems and methods by adding system-wide public address announcements, more visual message signs, and providing real-time information.	
	Provide better information at stations, including intermodal transfers, as well as nearby attractions and recreational facilities (i.e. kiosks and info boards).	
	Focus on education and information dissemination.	
	Improve options and expand the number of locations for redeeming Commuter Check vouchers.	
	Provide additional parking capacity at San Mateo County BART stations (i.e. Daly City & Colma).	
	Reduce impediments to switching modes or transit agencies through the use of a universal fare card/seamless fare system.	
	A fine job is done for North and South travel in the county, but east-west shuttle service across the county is needed.	
	Improve access and connectivity to stations.	
	Create and expand carsharing, bikesharing, and ridematching programs.	
	Examine more cost-effective ways to provide transit services.	
	Support telecommuting subsidies.	
	If fixed-route service is not cost effective, transit service providers should look at using on-demand and deviated route services to match trips to where people need to go.	
	Create "people-centered" shuttles, instead of "route-centered" shuttles to get people to popular destinations other than just Caltrain and BART.	
	Expand the employer-based shuttles to provide mobility options to more than specific employees.	
	Park and ride facilities should be looked at as a way to make shuttle services even more accessible.	

#### Focused Interest Area: **Caltrain**

Topics	Comments	Response
Improve connectivity, safety and the customer experience	Install pedestrian quad gates for at-grade crossings, and security cameras at stations and at-grade crossings to enhance safety.	Connectivity and safety are addressed in the “effectiveness” project evaluation criteria category. Customer satisfaction is addressed in the monitoring program performance measure. Recommended projects will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Upgrade passenger car interiors and station amenities (i.e. more shelter from the elements).	
	Implement a fare integration program to ease transfers between modes.	
	Install more ticket vending machines at stations and make them easier to use.	
	Caltrain needs to purchase additional rolling stock to improve capacity – including additional bicycle passenger capacity.	
	Improve system connectivity, including local and regional service connectivity.	
High Speed Rail	How can California High Speed Rail bond money be used to better leverage Measure A funds and complete the costly grade separation projects?	Leveraging funds from all sources is encouraged through the “effectiveness” project evaluation criteria category. Project/Policy coordination and consistency is addressed in the “policy consistency” project evaluation criteria category. The Project Sponsor that will play a key role in leveraging funding and ensuring investments that support HSR is the JPB.
	If the High Speed Rail bond is approved, the TA must ensure that money is not wasted by building capital projects that will need to be removed when the High Speed Rail system is built.	

#### Focused Interest Area: **SamTrans**

Topics	Comments	Response
Improve SamTrans service	Shorten headways on all transit modes in the county.	SamTrans service plans are prepared by SamTrans and will be considered by the TA only as it relates to the specific programs identified in the Measure A Program. Recommended projects will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Address the gaps in services provided.	

#### Focused Interest Area: **Accessibility**

Topics	Comments	Response
Improve paratransit and coordinated services	Provide same-day services.	A key focus of the Accessibility Services program is to encourage independent living for seniors with special mobility needs. Specific projects and service improvements will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Coordinate between public and private entities (i.e. shuttles used by senior housing complexes).	
	Consider access to food and health centers, particularly for the elderly and disabled.	
Provide more accessibility facilities and public information	Provide additional fare collection machines at more locations on train platforms.	The policy consistency and readiness project evaluation criteria categories address ADA requirements as well as conducting a thorough planning process that would address the needs of stakeholders including the senior population. Specific projects and service improvements will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Improve signage and wayfinding at stations.	
	Procure vehicles that facilitate easier boarding and aligning by disabled passengers.	
	Embark on a campaign to get the word out on all of the available services. Target the population group that will use the services. Many people don't even know some services exist.	

### Focused Interest Area: Environmental

Topics	Comments	Response
Encourage energy efficiency and protect natural resources	Use solar technology to power the trains when the system is electrified (i.e. solar installations at stations and on rail cars).	Environmental concerns are addressed in the "other" project evaluation criteria category. Recommended projects will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Electrify Caltrain to reduce our dependence on diesel fuel and improve the air quality.	
	Provide electricity for plug-in hybrid and electric vehicles at Caltrain stations.	
	Create travel lanes for neighborhood electric vehicles (i.e. golf carts).	
	Consider stormwater runoff, flooding and watershed protection when constructing new projects.	
Transportation demand management	Create HOV lanes in San Mateo County.	Eligible highway projects are identified in Chapter 3. The purpose of the Alternative Congestion Relief program is to implement projects that efficiently use the transportation network and reduce reliance on automobiles. Recommended projects will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Explore congestion pricing.	
Funding	Where possible, maximize the use of funding for bicycle and pedestrian improvements by funding them as part of other larger categories like Highways and Caltrain.	Funding for pedestrian and bike improvements from other Measure A programs is limited. Each program serves a specific purpose as described in Chapter 3. A key strategy to leveraging funding for bike and pedestrian improvements is to seek funding from other sources versus within the Measure A Program. Key bike and pedestrian funding sources are listed in Chapter 6.

## Focused Interest Area: Pedestrian and Bicycle

Topics	Comments	Response
Improve safety, remove barriers, provide connections, and provide access to activity centers	Repaint street crossings for better visibility.	Safety and connectivity concerns are addressed in the "effectiveness" project evaluation criteria category. Recommended projects will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Install audible pedestrian signals at intersections.	
	Explore other paving materials besides asphalt.	
	Always consider safety factors (people bike and walk more when the environment is perceived as safe).	
	Ensure access to bike lockers at Caltrain stations by getting keys back from users.	
	Provide pedestrian grade separations/undercrossings at Caltrain tracks.	
	Create an overpass connection between El Camino Real and Burgess Campus in Menlo Park.	
	Construct a pedestrian overcrossing for Highway 1 in Half Moon Bay to make it safe, especially for children, to cross Highway 1 and people do not have to drive just to get across the street.	
	Install more street-level pedestrian signals instead of underpasses or foot bridges which can pose safety concerns.	
	Complete the trail from Montara to Half Moon Bay.	
	Complete the trail from Woodside to Portola to Skyline and tie it into the parks system.	
	Improve coordination among bike and trail systems.	
	Reopen upper Alpine Road near Stanford for pedestrian and bike traffic.	
	Invest in a complete off-road trail system.	
	Improve walkability, especially for seniors and persons with disabilities.	
Funding	Create a countywide bike plan.	
	Improve pedestrian routes to and from schools.	
	Incorporate pedestrian and bike access into major highway and transit projects so funding does not come out of this smaller pot of money.	Funding for pedestrian and bike improvements from other Measure A programs is limited. Each program serves a specific purpose as described in Chapter 3. A key strategy to leveraging funding for bike and pedestrian improvements is to seek funding from other sources versus within the Measure A Program. Key bike and pedestrian funding sources are listed in Chapter 6. Based on the 2004 Expenditure Plan, there is no split between bicycle and pedestrian projects.
	Keep pedestrian project priority on par with bicycle projects.	

## Phase 2: Community Meeting Comments

Geographical Area: Coastside		
Topics	Comments	Response
Transportation needs on the Coastside	Provide more weekend and evening shuttle services to BART and Caltrain.	Under the project evaluation criteria, geographic equity was added to the "other" category. This addresses the importance of making investments throughout the county. Proposed projects will need to be coordinated through the Project Sponsors as identified in Chapter 5 to be considered for TA funding.
	Create additional shuttle service to SFO.	
	People need to stop and shop for the economic vitality of the coastside, not just pass through as quickly as possible.	
	How can the congestion needs of the coastal communities be addressed?	
	Highway 1 is extremely important, and traffic congestion poses a serious health & safety issue if the road is blocked.	
	Highway 1 is a major thoroughfare and should be treated with regional significance.	
	Consider more possibilities than just widening for Highway 1.	
	Look at the context/importance of a thoroughfare to a community.	
Environmental Concerns	Consider carbon neutral buses added on the coastal commute, as well as clean shuttles and other vehicles.	Environmental concerns are addressed in the "other" project evaluation criteria category. Recommended projects will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Be cognizant of stormwater flows and provide for flood control.	
	Reduce carbon dioxide pollutant levels.	
	Foster healthy communities.	
	Reduce vehicle miles traveled.	



Geographical Area: **Bayside**

Topics	Comments	Response
Congestion Relief	Promote system management projects like tolling, rather than more widening.	Congestion relief is addressed under the "effectiveness" project evaluation criteria category. All eligible "key congested area" projects are listed in Chapter 3. Recommended projects proposed for the "supplemental roadway" program will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
	Reversible lanes should be considered, where you cannot widen streets and traffic patterns make it feasible.	
	The SR-92 West exit onto El Camino Real is very congested.	
	The Highway 101 and SR-92 interchange needs to be re-done since it does not have the capacity to handle peak demand.	
	Improve highway on/off ramps for better traffic flow.	
	Make sure projects actually improve level of service/reduce congestion or at least do not make the situation worse.	
	Reduce the number of cars entering from other counties.	
	Reduce overall door-to-door travel time, regardless of the mode.	
Transit Service Improvements	Improve overall transit system connectivity.	Connectivity is addressed under the "effectiveness" project evaluation criteria category.
	Improve multimodal connectivity and coordination, beyond just transit.	
	Make sure to preserve good cross-county connectivity.	
	Look at impacts on other transportation facilities when evaluating projects.	
	Focus on providing accessibility to all.	
Performance	Promote good safety/accident record.	Safety and cost related to benefits are addressed under the "effectiveness" project evaluation criteria category.
	Improve farebox recovery ratios.	
	Reduce the cost per passenger.	
	Be careful to weigh the criteria appropriately to provide the best benefit for the money expended.	
	Make sure projects actually meet community needs.	
Needs, policy considerations and coordination	Balance the needs of city residents and commuters from other cities/counties.	"Project justification", "policy consistency" and "readiness" are project evaluation criteria categories.
	Ensure resource allocation equity between communities receiving funds.	
	Ensure environmental equity in criteria/impacts.	
	Consider regional impacts, including cumulative impacts.	
	Ensure coordination with city general plans.	
	Ensure interagency & public/private coordination.	
Environmental	Look at the environmental impacts/sustainability of projects.	Environmental concerns are addressed in the "other" project evaluation criteria category.
	Strive for the most energy efficient projects.	

*NOTE: Staff received comments related to both the 1988 and 2004 Measure A Programs.*

*Appendix A reflects comments and questions related to the 2004 Measure A Program.*

*Comments and questions related to the 1988 Measure A Program have been addressed separately.*

## Appendix B: Draft Strategic Plan Comments

### Focused Interest Area: Pedestrian and Bicycle Program

Comments	Response
Ensure safe pedestrian and bicycle crossings with interchange improvements.	Pedestrian and Bicycle Program funding can be used for the planning, design development and construction of projects in San Mateo County that encourage and improve cycling and walking conditions. The candidate list of eligible projects in the Strategic Plan were recommended through the public forums and workshops that were conducted for the development of the 2004 Expenditure Plan. Projects on the candidate list, as well as new proposed projects that address the purpose of the program, are eligible for funding and will be evaluated through the Call for Projects application process. Incorporating bike and pedestrian components to other capital projects will be considered when program-specific criteria are defined.
Funds would be better spent on making existing roads safer for bicyclists to share roads with motorists, than on building bike bridges over roads and highways.	
Provide money to Caltrain to add more bicycles on trains.	
Consider development of bicycle boulevards.	
The Millbrae Avenue and Hillsdale bicycle/pedestrian overpasses shouldn't be funded.	
Funds should be used for education and publicity about bicycle safety.	
The Pedestrian and Bicycle program money should not be used to fund the Caltrain Bicycle Access and Parking Plan recommendations.	
Clarify the goals of the Pedestrian and Bicycle program.	
Would Safe Route to School implementation be an eligible project under this category?	

### Focused Interest Area: Highways & Roads

Comments	Response
Decrease congestion around the SR 92 and US 101 interchange.	Improving safety and decreasing local and countywide traffic congestion are primary goals of the Measure A program. Eligible projects are defined under the Highway Program description in the 2004 Expenditure Plan. New projects (not listed in the plan) that address the program purpose are eligible for funding under the Supplemental Roadway subcategory. Recommended projects will need to be coordinated through the Project Sponsor as identified in Chapter 5 to be considered for TA funding.
Highway 1 improvements are needed to improve congestion, quality of life, and safety.	
Repairing potholes on local streets is important.	
Consider a second road (running north-south) through Pacifica for emergency situations.	
Synchronization of lights on Highway 1 in Pacifica is important.	
Improve public access on Highway 1 for safe vehicle ingress and egress to two National Park sites in San Mateo County: Sweeney Ridge and Montara Lighthouse.	

### Focused Interest Area: Transit

Comments	Response
Improvements to Caltrain facilities need to be made in a timely fashion if projects along the Caltrain corridor are to succeed as transit-oriented developments.	The 2004 Expenditure Plan specifies that projects which support transit-oriented development will be given priority. Criteria categories that will be used to evaluate and prioritize projects are listed in Chapter 5.
Public transit is important for the intermobility of local communities, and for connecting the region with bullet trains.	
Caltrain projects, particularly those in San Mateo County, should receive high priority in the plan.	

#### Focused Interest Area: Process

Comments	Response
Information regarding how Project Review Committees will be established needs to be provided to allow for geographic equity.	Conducting a thorough planning process is captured under the project "Readiness" evaluation criteria. Each program category may differ slightly in its planning process definition and will be addressed when the program-specific criteria are defined. Additionally, project review committees will be formed post-adoption of the Strategic Plan and timed with the Call for Projects.
Include information in the Strategic Plan regarding how and what counties/agencies the TA will coordinate and interface with as the Strategic Plan is implemented and funding decisions are made.	

#### Focused Interest Area: Funding Availability

Comments	Response
Consider advancing funds through selling bonds and also undertaking projects prior to the actual revenue collection of sales taxes to maximize cost savings and the capacity to do additional projects.	Requests for the advancement of funds will be considered on a case-by-case basis and will need to be justified with compelling reasons that offset the impact of financing fees and/or timing of funds to other projects.

#### Focused Interest Area: Criteria and Performance Measures

Comments	Response
Include Environmental Benefit and/or Emissions Reduction as a criteria.	Environmental Impact is one of the example criteria for project evaluation. It includes the potential environmental benefits and disbenefits of a project. Effectiveness and Policy Consistency are project evaluation criteria. Specific measures of effectiveness and relevant laws and adopted policies, such as AB 1358, will be identified when program-specific criteria are defined.
Be sure to assess the effectiveness of projects.	
There is no reference to AB 1358, the California Complete Streets Act of 2008, in the Strategic Plan.	

#### Focused Interest Area: 2004 Expenditure Plan Framework

Comments	Response
The plan identifies a list of projects and states that other projects will be considered without stating the criteria for inclusion.	The percentage distribution for each program category was determined with the development of the 2004 Transportation Expenditure Plan and approved by voters in 2004. The projects listed in the Strategic Plan were recommended through the public forums and workshops that were conducted as part of the development of the 2004 Expenditure Plan. These projects are eligible for funding and, with the exception of the Key Congested Area category under the Highway Program, additional projects may be proposed for funding if they meet the purpose of the program categories.
The percentage share for Bicycle and Pedestrian projects should be higher.	
I am concerned that the percentage of money going towards highways is too much compared to public transit.	

**NOTE:** Staff received comments related to both the 1988 and 2004 Measure A Programs.

Appendix B reflects comments and questions related to the 2004 Measure A Program.

Comments and questions related to the 1988 Measure A Program have been addressed separately.



# Acknowledgements

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