



CONTRA COSTA  
transportation  
authority

COMMISSIONERS

December 4, 2024

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Metropolitan Transportation Commission  
375 Beale Street  
San Francisco, CA 94105

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Ken Carlson

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Subject: Regional Transportation Revenue Measure

Federal Glover

Dear Commissioner Spering:

Chris Kelley

We appreciate your leadership and efforts to seek regional agreement on potential legislation – and a future ballot measure – that will sustain and improve the regional transit system and address the looming transit fiscal cliff.

Aaron Meadows

Sue Noack

Scott Perkins

Your letter, dated September 20, 2024, invited the Contra Costa Transportation Authority (CCTA) to share our thoughts and approach to addressing the funding gap. We agree that close collaboration and multijurisdictional consensus is the best path forward. Accordingly, we offer the following principles to guide the development of a regional Transit Revenue Measure (TRM) funding framework:

Renata Sos

Timothy Haile,  
Executive Director

- **Preserves the Bay Area Rapid Transit (BART):** The TRM must address the fiscal cliff for BART first as it is the only system that serves the four core counties (Alameda, Contra Costa, San Francisco and San Mateo).
- **Four-County Measure Minimum:** The TRM should at a minimum include San Francisco, Alameda, San Mateo, and Contra Costa counties as they form the core of the Bay Area and are served by BART.
- **County Flexible Funds:** After addressing the BART fiscal cliff, the measure should be spent at the discretion of the County Transportation Agencies (CTAs) to address transit funding shortfalls, and transit transformation projects, in partnership with local county transit operators. Contra Costa County residents already contribute significantly to BART – although many do not have a station in their city/town. It is critical that we continue to fund BART feeder bus service, which increases access for these communities to the system they fund.
- **Return to Source:** Each county should receive a minimum of 90% of its revenue contribution.
- **Variable Tax Rate:** The TRM should consider variable tax rates to address the change in travel behavior and the resulting uneven transit funding shortfalls across the region.

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*Jim Spring*  
*Metropolitan Transportation Commission*  
*December 4, 2024*  
*Page 2*

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Should a variable tax rate not be feasible, funding shortfalls should be addressed by separate county measures.

- **Revenue Mechanism:** Numerous funding mechanisms should be explored including sales and parcel tax options.
- **Performance Targets:** Funding should be tied to performance targets developed with input from CTAs and transit agencies. To ensure the long-term sustainability and effectiveness of transit services, we emphasize the need for a comprehensive plan that outlines performance targets, addresses current challenges, and sets a clear path forward. This plan should prioritize rider needs and protect investments, increase transparency and accountability, leverage scalable innovative solutions, and proactively address potential service changes.
- **Short-Term Measure:** A short-term measure (10-year or less) would incentivize exploration of new business models, test performance targets, and strengthen our collective voice as we advocate for more State and federal fund sources for transit. It also reduces conflicts with future transportation sales tax extensions, such as Contra Costa County which expires in 2034.

On November 20, 2024, the CCTA Board discussed the recommendations from the Select Committee and proposed funding scenarios. There was general agreement that the above principles should guide the development of a regional TRM.

Thank you again for your commitment to seeking a funding framework. We are optimistic this process will lead us to a successful RTM. We also look forward to continuing parallel conversations about sustainable funding models, should an RTM ultimately be unfeasible. We hope the above information is helpful in achieving regional consensus.

Sincerely,



Newell Arnerich  
Chair

Cc: Andrew Fremier, Executive Director, Metropolitan Transportation Commission (MTC)  
Alix Bockelman, Chief Deputy Executive Director, MTC  
Federal Glover, CCTA Commissioner/MTC Ex-Officio Representative, MTC Commissioner  
Sue Noack, CCTA Commissioner/MTC Ex-Officio Representative, MTC Commissioner  
Timothy Haile, Executive Director, CCTA



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**Executive Director**  
Tess Lengyel

October 7, 2024

Jim Spering, Chair  
MTC Select Committee on Bay Area Transportation Measure  
375 Beale Street, Suite 800  
San Francisco, CA 94105

**RE: Response to 9/20/2024 Letter on Transportation Revenue Measure**

Dear Commissioner Spering:

On behalf of the Alameda County Transportation Commission (Alameda CTC), thank you for your continued leadership and commitment to seeking a framework for a funding measure to provide critical funding to address the fiscal emergency facing the region’s transit operators. A robust and sustainable transit system is critical to Alameda County and our region’s climate, equity, economic and mobility goals. Alameda CTC is committed to continuing to work with all partners on the options under consideration to support transit.

Alameda CTC’s 2024 Legislative Program specifically includes “advocate for sustainable funding to support transit agencies in their continued recovery” as a core legislative priority. Our Legislative Program includes support for efforts to increase transportation funding, including as part of any regional transportation measure, and support for transit agencies as they seek to recover from impacts of the pandemic on fiscal solvency and ridership, including regional efforts to secure sustainable multi-year funding and improve service for the public.

Your letter dated September 20, 2024, requested the four counties served by BART share ideas and options for how to move forward and how to close the funding gaps presented by MTC and the transit agencies. Alameda County’s Measure BB already provides significant funding to transit operations and capital needs throughout the county, including over \$90 million annually to support AC Transit operations, comprising their third largest revenue stream. That said, we recognize transit agencies are facing dire funding shortfalls and new revenues are necessary to support transit operations our communities rely upon.

Per your request, below are initial thoughts for your consideration:

- Consider a shorter-term option focused on saving transit: While transit agencies have long-term structural funding challenges, a shorter-term measure geared towards solving the fiscal emergency may be more palatable to voters and allow for clearer messaging. A shorter-term measure would also allow for the region to demonstrate continued strong local support for transit to the state in ongoing discussions regarding transit funding at the state level. It would also provide transit agencies time to transition their operating models to adjust to the new travel patterns and demonstrate progress to the public.
- Consider multiple funding mechanisms: Sales tax levels in Alameda County already exceed 10 percent. Additional increases to the sales tax are extremely challenging and concerning given the regressive nature of sales tax and impacts on our low-income and most vulnerable residents. We suggest MTC continue looking at other options, such as a parcel tax, or a combination of options to explore ways to reduce the reliance solely on sales tax.
- Consider authorizing legislation that provides flexibility and delegates various authority to the region: the authorizing legislation for Alameda CTC's Measure BB authorized going over the 2 percent cap but delegated the policies, projects and authority to develop an expenditure plan to the county. This provided additional time and flexibility to develop the full details and allowed the expenditure plan to be developed at a more local level. MTC could consider a similar approach to allow the region time to continue to work through the challenging details at a regional and local level, and also provide flexibility to be responsive to the public.

Again, we appreciate the importance of this effort and look forward to working with all stakeholders to support a robust and sustainable transit system.

Sincerely,



John J. Bauters  
Chair

Alameda County Transportation Commission

cc: Nate Miley, Supervisor, Alameda County  
Carol Dutra-Vernaci, Mayor, Union City  
Sheng Thao, Mayor, City of Oakland  
Andrew Fremier, Executive Director, Metropolitan Transportation Commission  
Alix Bockelman, Chief Deputy Executive Director, Metropolitan Transportation Commission



Metropolitan Transportation Commission  
Joint MTC ABAG Legislation Committee  
375 Beale Street  
San Francisco, CA 94105

RE: 3a. Transportation Revenue Measure Select Committee Update

November 7, 2024

Dear MTC Commissioners:

As leaders of the Santa Clara Valley Transportation Authority (VTA), which provides transportation solutions to our community of almost 1.9 million people, we want to thank the Metropolitan Transportation Commission (MTC), and especially the extraordinary leadership of Transportation Revenue Measure Select Committee Chair Jim Spering. We appreciate the many frank discussions with Chair Spering in which we considered a number of options to support transportation in Santa Clara County and in the greater Bay Area. Chair Spering listened to our concerns and understood the financial relationships between and among our partner agencies.

Regrettably, we are unable to join you at the November 8th Joint MTC ABAG Legislation Committee meeting due to a VTA Board of Directors scheduling conflict, so we provide our comments to Item 3a through this letter.

VTA's mission is to provide transportation solutions for the movement of our community members within our county and to facilitate access to the greater Bay Area region. Changes in commute patterns in the wake of the pandemic have challenged VTA and its regional partners differently. There are no one-size fits all solutions to address all the regional transportation agencies' financial situations. At the same time, we believe it is our obligation to be a deep and meaningful partner in the efforts to maintain and transform transit services across the region. Given this reality, VTA proposes to support the transportation needs of our county, partner agencies, and the region by "opting in" to a parallel, separate Santa Clara County 30-year half cent sales tax measure, should VTA polling indicate its likely voter passage.

With the successful passage of a 30-year Santa Clara County parallel tax measure, VTA would directly manage these funds to ensure the financial resources are allocated to address its future fiscal needs, restore service, and make system improvements in accordance with its fiduciary responsibility to the voters of Santa Clara County. This measure, combined with a 4-county regional tax measure, will provide the flexibility needed for VTA to support its regional partners in the following ways (see **Exhibit 1 for uses of the current 2000 Measure A proceeds and the potential uses of a new 30-year measure beginning in FY26**):

- Ensures VTA meets its contractual obligations to BART and Caltrain in support of their operations (**see Exhibit 2 for past and future payments to BART and Caltrain**)
- Provides resources allowing VTA to directly assist BART and Caltrain in mitigating their pending fiscal deficits by remedying challenges with current agreements
- Provides additional resources to address pending fiscal deficits of BART and Caltrain where a four (4) county measure may fall short, which would be repaid in accordance with amendments to existing agreements
- Provides critical funding to support future regional transportation projects and programs within Santa Clara County
- Supports Regional Transit Transformation through MTC and at the County level in amounts to be determined, currently estimated at 10%
- Ensures VTA can increase transit service to levels comparable to Bay Area and other metro area operators, as expected by Santa Clara County residents (**see Exhibit 3 and Exhibit 4 related to per capita service levels, reflecting VTA’s need to restore service**)

VTA recognizes the past generosity of its voters who support the transportation services it provides to our community, while acknowledging that this proposed parallel 30-year measure eliminates risk should Santa Clara County voters not renew the local Measure A tax by 2036. A parallel Santa Clara County revenue measure, managed directly by VTA, provides the greatest opportunity to support transportation in Santa Clara County, for our partners, and facilitates access to the greater Bay Area region.

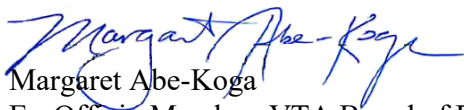
Sincerely,



Cindy Chavez  
 Chairperson, VTA Board of Directors  
 Santa Clara County Supervisor  
 MTC Commissioner



Matt Mahan  
 Member, VTA Board of Directors  
 City of San Jose Mayor  
 MTC Commissioner



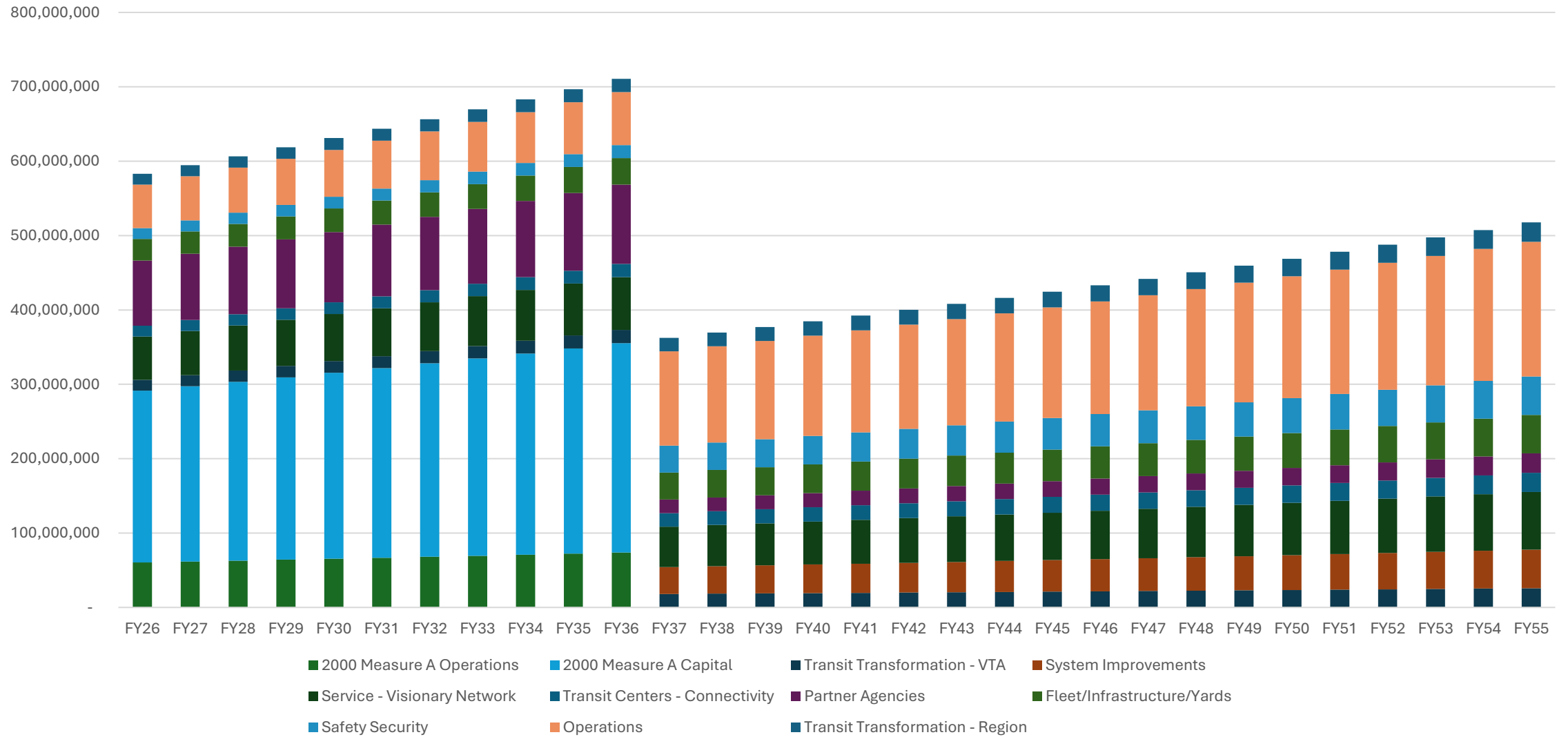
Margaret Abe-Koga  
 Ex-Officio Member, VTA Board of Directors  
 Mountain View Councilmember  
 MTC Commissioner



Carolyn M. Gonot  
 VTA General Manager/CEO

### 2000 Measure A and 2026 Measure Utilization

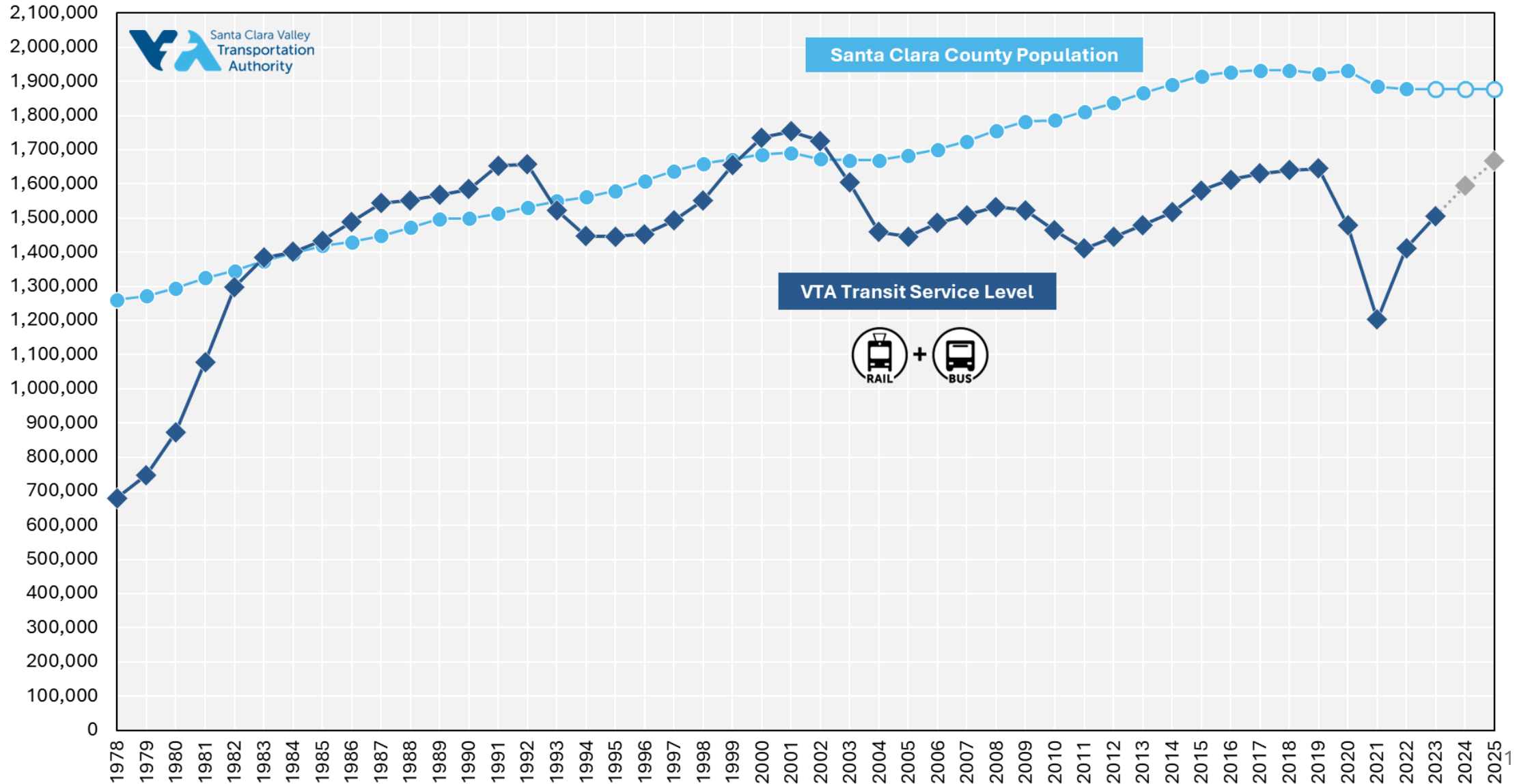
Exhibit 1



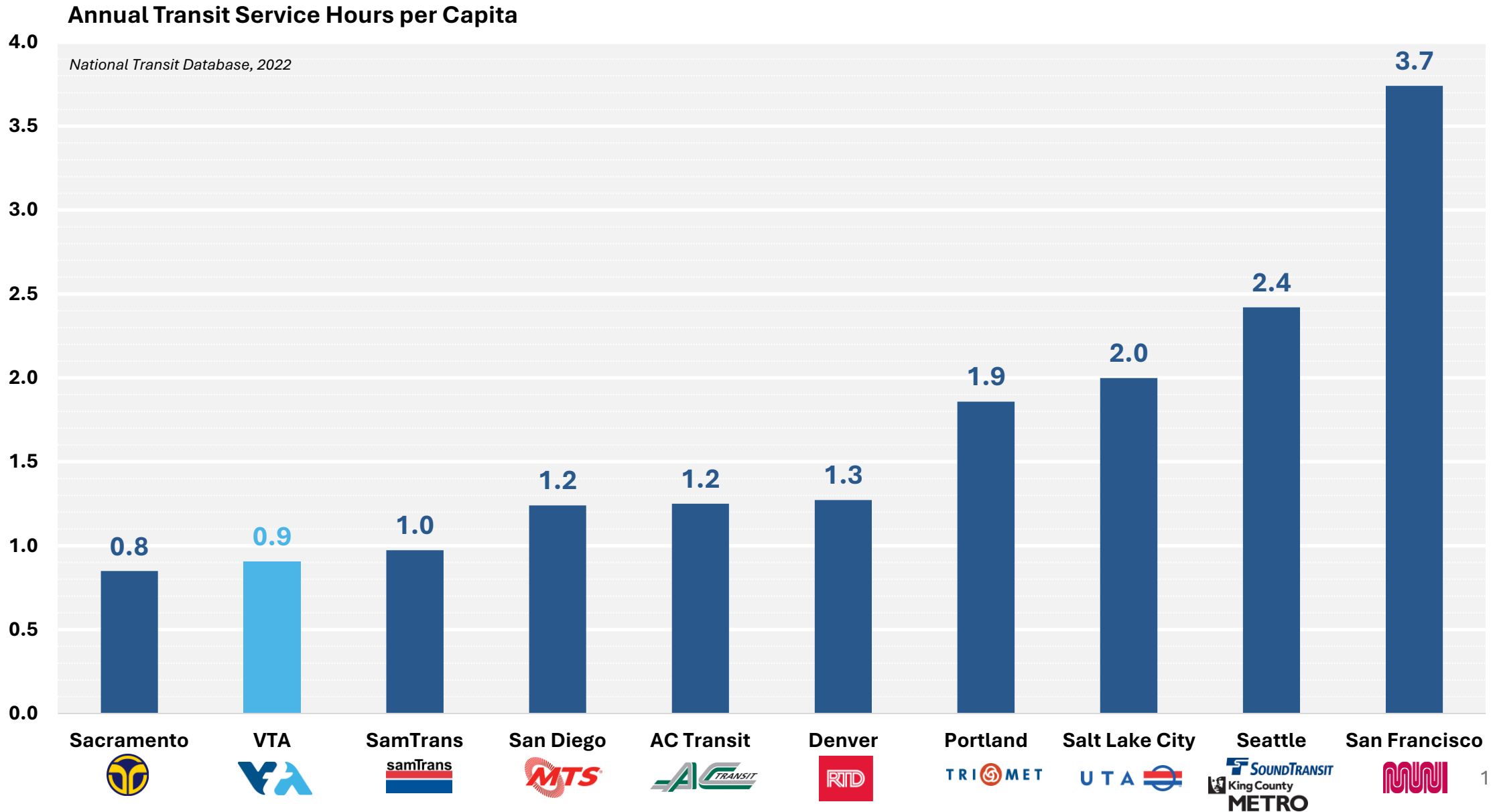
Partner Agency	Funding Source	Provided thru FY25	Future Estimates	Note Regarding Future Estimates
<b>BART – O&amp;M Agreement</b>	2008 Measure B	\$365.5 million	\$1.725 billion	Aggregate annual estimate thru FY36
<b>Caltrain – Operating Deficit</b>	VTA Transit Funds	\$96.6 million	TBD	To be determined based on actual deficits and allocation formula
<b>Caltrain – Measure A Program</b>	2000 Measure A	\$182.7 million	N/A	Measure A projects complete
<b>Caltrain – Corridor Capacity</b>	2016 Measure B	\$42.5 million	\$271.5 million	Remaining estimate of program dollars
<b>Caltrain – Grade Separations</b>	2016 Measure B	\$178.0 million	\$522.0 million	Remaining estimate of program dollars



VTA Transit Service Levels and Service Area Population



# VTA Provides Less Service Per Capita Than Most Peers





November 26, 2024

Jim Spering, Chair Transportation Revenue Select Committee  
Metropolitan Transportation Commission  
Bay Area Metro Center  
375 Beale Street, Suite 800  
San Francisco, California 94105

SUBJECT: ADDRESSING THE TRANSIT EMERGENCY FACING THE BAY AREA

Dear Chair Spering,

On behalf of Chair Mandelman and the San Francisco County Transportation Authority, I'd like to thank you for your tireless support of Bay Area transit and for the countless hours you have spent discussing potential solutions with partners throughout the region to address the fiscal emergency facing many of the region's transit operators. The San Francisco County Transportation Authority recognizes that a robust, safe, and reliable transit system is necessary to support San Francisco's, the Bay Area's, and the State's climate, equity, economic, and livability goals. This is a pivotal moment for transit operators that need time and resources to transition to less fare reliant revenue models and to respond to new post-pandemic travel patterns.

On October 21, 2024, the MTC Transportation Revenue Measure Select Committee discussed and provided feedback on the latest revenue measure scenarios developed by MTC staff as well as a proposal developed by SFMTA in consultation with other transit operators. We are pleased to see progress being made on multiple scenarios that better address concerns raised by various stakeholders and seem to be gaining more traction. We support continuing to advance the scenarios, including the transit operator scenario and all revenue sources, to enable discussions and refinements to continue, including but not limited to being able to take poll results into account.

While the Transportation Authority's board has not endorsed any of these proposals, staff favor (pending polling information) the two proposals with shorter durations - Scenario 1A and the SFMTA proposal - which would provide urgently-needed financial assistance to our major transit operators; simplify messaging; and ease concerns about taking up part of counties' tax capacity on a long-term basis. We also support further exploring the Hybrid (parcel/sales tax) Scenario and assume all scenarios include direct or side participation by a minimum of the five core Bay Area counties. Finally, we are open to a variable rate model which may offer more options to sufficiently address transit's financial needs while appealing to regional interest in greater San Francisco self-help.

We also support a flexible and inclusive legislative framework, to allow time to gather more information (including polling data) and develop the consensus needed for a regional measure and/or sub-regional solutions to be successful.



The Transportation Authority greatly appreciates your and MTC's efforts towards building consensus on a regional transportation revenue measure and looks forward to continued collaboration to help transit thrive in the Bay Area.

Sincerely,



Tilly Chang  
Executive Director

CC: MTC - A. Fremier, A. Bockelman, R. Long,  
SFMTA - J. Tumlin  
SFCTA Chair Mandelman

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November 6, 2024

Commissioner Jim Spering  
Chair, MTC Transportation Revenue Select Committee  
375 Beale Street, Suite 800  
San Francisco, CA, 94105

Dear Commissioner Spering:

San Mateo County leaders recognize the importance of maintaining a strong regional public transit network in the Bay Area. Together we must not allow our rail systems to fail. However, solutions must be fair, likely to pass the muster of voters, and must not jeopardize local transportation systems and priorities.

Transportation agencies in San Mateo County are interwoven and interdependent; we understand the importance of collaboration and stakeholder engagement. This also means it takes our five independent Boards, agencies, elected officials, appointed officials, and community stakeholders sufficient time to build consensus.

Each of the following agencies has a vested interest in the outcome of this process and may take a position on any legislation that will be introduced. The San Mateo County Transit District (SMCTD) is the mobility manager overseeing the principal transportation systems and programs in San Mateo County. The District is governed by the SamTrans Board of Directors. SMCTD is also the managing agency for Caltrain and the San Mateo County Transportation Authority (SMCTA) under the direction of their independent Boards. Additionally, the District provides staffing in several functions for the San Mateo County Express Lanes JPA. Meanwhile, The City/County Association of Governments (C/CAG) serves as the Congestion Management Agency (CMA) and provides staffing support for the Express Lanes jointly with SMCTA staff.

**Top priorities for San Mateo County leaders include:**

- **Voluntary participation:** The region must not include San Mateo County voters in a revenue measure without the consent of our elected representatives. San Mateo County should only be included in the enabling legislation for a regional measure if the county approves such an action. It is also important that voters pass the revenue measure by the required vote threshold within San Mateo County (e.g. 2/3 majority for specific tax, 50% +1 for Citizens' Initiative) to impose the local tax.
- **Continued responsible fiscal management of SamTrans Bus and its suite of services:** Although SamTrans does not currently confront an operational deficit, costs and inflation continue to rise. We also have significant unfunded capital needs, including State mandates to convert our fleet of transit vehicles to 100% zero emission by 2040, and other infrastructure upgrades to address sea level rise and climate change. A new revenue measure must include flexible funds for SamTrans. Our leaders consistently oppose revenue measures that do not provide fair return-to-source funding for San Mateo County and require us to become a "donor county."
- **Protection of Caltrain service:** SamTrans is the managing agency for Caltrain. San Mateo County is committed to proportionally funding Caltrain under the structure of the Joint Powers Agreement that established and continues to govern Caltrain as a

supplement to Measure RR revenues. All three counties that govern Caltrain (Santa Clara, San Francisco, and San Mateo) must participate in any new revenue measure. Each county’s participation must be clear and guaranteed.

- **Protection of local transportation revenue measures:** Existing voter-approved and locally developed expenditure plans include critical funding for Caltrain, BART, SamTrans bus, paratransit, shuttles, ferry service, maintenance for local city streets and roads, Caltrain grade separation projects, bicycle and pedestrian investments, regional transit connections, highways, safe routes to school, mitigation for traffic congestion and water pollution. Even a 0.125% (1/8) sales tax increase will raise eight of our 20 cities (40%) to an overall 10% sales tax rate. Any new regional measure must not jeopardize the reauthorization of local funding measures.

**The following dates include estimated renewal years in advance of each measure’s expiration:**

Title	Est. Renewal Year	Est. Annual Revenue	Type	Administered by:
Measure A	2028	\$120M	.5% sales tax	SMCTA
Measure M	2032	\$7M	\$10 vehicle registration fee	C/CAG
Measure W	2044	\$120M	.5% sales tax	SMCTA & SamTrans
Measure RR	2048	\$30M	.125% sales tax	Caltrain

**1. A successful regional ballot measure must:**

- Have a simple and limited scope.
- Preserve and protect the ability to self-fund.
- Prioritize fair geographic distribution.
- Enhance accountability and oversight.
- Give counties authority over funding decisions.

**2. San Mateo County’s financial responsibility to our regional rail systems:**

**Caltrain:** As the managing agency for Caltrain and one of three member agencies of the JPB, SamTrans has a legal responsibility to fund our proportional share of Caltrain. We recognize Caltrain serves commuters throughout the entire length of San Mateo County.

**BART:** While BART provides important service in five (25%) of our cities and throughout the region, San Mateo County is not a member of the BART District. SamTrans has an existing agreement with BART and MTC that clearly defines San Mateo County’s past, present, and future operational and capital funding obligations to BART. This 2007 negotiated agreement considered the significant investment that SamTrans and San Mateo County riders have and will continue to pay into the system and considered the hundreds of millions of dollars’ worth of capital contributions, SFO Extension project contributions including design and construction costs, and land value ripe for transit-oriented development that SamTrans transferred to BART at zero cost. SamTrans has fully complied with the existing agreement.

- We recognize no one could have predicted the pandemic and its impact on public transit, especially to BART and Caltrain.
- Any additional financial contributions to BART considered by San Mateo County voters and their elected representatives will be voluntary and should be met with improvements and accountability.
- We disagree with MTC/BART’s calculation of San Mateo County’s proposed fair-share contribution to BART that would fund operational deficits. We are also concerned that agencies calculate operational deficits differently, which will directly impact the benefit they receive from a regional revenue measure.
- Third Party Reviewer: we recommend an independent Third-Party Reviewer of budget deficits and proposed fair-share calculations for each agency named in the regional revenue measure. This will ensure full transparency,

consistent modeling, and resolve discrepancies about how to calculate fair-share contributions and operational deficits.

- BART/MTC have suggested (per Commissioner Spering’s letter and subsequent presentations) that San Mateo County’s reasonable fair-share towards BART and Caltrain ranges between \$70-\$130M annually. This means San Mateo County’s annual fair-share for BART alone could equal up to \$100M annually. We understand this calculation assumes San Mateo County should fund the deficit incurred by the BART District, in accordance with the share of ridership from each BART county, minus what each county is currently contributing to BART in county revenues. We also understand BART’s costs used to calculate the counties’ share include “all-in” costs, which cover not only operations, but also capital, deferred maintenance, administrative overhead, and debt service.
- The proposed approach described above, as we understand it, treats San Mateo County as though it were a member of the BART District, disregards the past agreement between SamTrans, BART and MTC, and does not account for contributions to the system from this county, including the only county-specific surcharge in the region. The amount of funding San Mateo County provides to BART should not be equivalent to BART District counties and must be an amount our voters will support.
- San Mateo County elected leaders may be willing to consider contributing proportionally to BART’s **pandemic fare loss** in San Mateo County, in return for improvements to our BART stations—not the status quo.

**3. If San Mateo County elected officials decide to support a revenue measure that helps BART address its financial crisis, San Mateo County must gain in return from BART:**

- Ironclad agreements about how the money will be spent.
- Commitment to continue providing BART service at all San Mateo County stations at a level consistent with systemwide service and coordinating that service with Caltrain and SamTrans schedules to ensure seamless transfers.
- Clear benefits and improvements to San Mateo County BART stations so that taxpayers see and feel improvements to safety and “quality of life” issues resulting from their new investment (e.g. frequent cleaning, improved security, lighting, new fare gates).
- Accountability: full transparency regarding BART’s efforts to align service with existing post-pandemic ridership trends and scale its operations appropriately, plus responsible fiscal management of administrative overhead costs.
- Acknowledgement and full accounting of existing and historic contributions of San Mateo County into the BART system. It is vital to have a fair and transparent accounting of these investments to build consensus for a regional transportation measure in San Mateo County.

**4. Possible funding solutions:**

- Decisions about which type of revenue measure to place on the ballot must be data-driven and supported by robust polling data.
- Simpler revenue measures with clear expenditure plans have a higher likelihood of passing.
- In addition to evaluating and responding to the myriad of revenue proposals suggested by MTC, BART, Caltrain, Muni and individual legislators, San Mateo County leaders are thinking creatively about practical funding solutions grounded in equity and fairness. These solutions include taxes, fees, and/or modifications to existing expenditure plans. We are committed to engaging with community stakeholders before we publicly propose funding solutions.

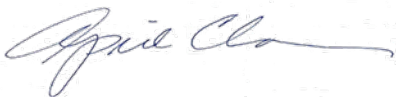
- San Mateo County will propose funding solutions after we establish consensus with MTC about our county's appropriate fair-share contribution. Solutions must fit the problem.
- Although the SMCTA and SamTrans Board of Directors have not yet taken an official position on MTC's proposed regional revenue measures, recent feedback indicates that our elected leaders do not support MTC's current proposals.

In the coming weeks, San Mateo County leaders and stakeholders will continue to explore the pros and cons of revenue measures that include:

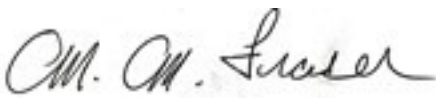
- MTC's Scenario 1, 1a, and 2
- SFMTA-led Operator Proposal, a.k.a. "Bay Area Transit Operators Partnership Funding Network"
- San Mateo County revenue measures, and/or other county-coordinated efforts

San Mateo County has a long history of being a collaborative regional partner. Our record demonstrates that San Mateo County stepped up to the plate and leveraged local taxpayer dollars for the greater regional good at critical moments when other agencies did not or could not. Here are three examples: 1) purchasing the railroad ROW from Union Pacific, giving birth to Caltrain for the mutual benefit of Santa Clara, San Francisco, and San Mateo Counties; 2) purchasing the Dumbarton Corridor to preserve the transit asset for the mutual benefit of Alameda and San Mateo Counties; and 3) funding capital and operations to realize the BART District's vision for an SFO Airport extension including four San Mateo County stations—which nearly sunk SamTrans financially until a fair exit strategy was negotiated—for the benefit of the regional BART system. And now, in 2024, San Mateo County leadership is considering creative financial solutions to voluntarily help regional transit operators with fiscal cliffs. Collaboration among cross-functional stakeholders is The San Mateo County Way and we will continue to work towards practical solutions.

Sincerely,



April Chan  
General Manager/CEO and Executive Director



Marina Fraser  
Chair, San Mateo County Transit District Board of Directors



Carlos Romero  
Chair, San Mateo County Transportation Authority Board of Directors

Cc: San Mateo County Transit District Board of Directors  
San Mateo County Transportation Authority Board of Directors  
David Canepa, Commissioner, Metropolitan Transportation Commission  
Gina Papan, Commissioner, Metropolitan Transportation Commission  
Andrew Fremier, Executive Director, Metropolitan Transportation Commission  
San Mateo County Transit District and San Mateo County Transportation Authority State Legislative Delegation