

Strategic Plan Update (2025-2029) Frequently Asked Questions

General Questions on Voter-approved Measures

How do the Measure A and Measure W Expenditure Plans relate to what was approved by voters?

The TA's enabling legislation in California Streets and Highways Code Sections 131000, et seq. serves as the primary State law governing the TA and establishes what steps must be taken to establish a transportation authority (TA) in the nine-county Bay Area. The steps include approval by the county's voters of (a) creation of a TA, (b) imposition of a sales and use tax, and (c) an expenditure plan for resulting tax revenues. Therefore, when the voters approve a sales tax, that approval includes the tax measure and the associated expenditure plan, all of which become local law. The TA's Board of Directors (Board) is then responsible for implementing that law. The Board's primary task is to allocate the sales tax revenues in accordance with that local law.

Measure A

In 1988, the voters of San Mateo County created the San Mateo County Transportation Authority and imposed a 20-year ½-cent transactions and use tax to support local transportation, transit and traffic congestion relief to be implemented in accordance with an expenditure plan (Original Measure A and the 1988 Transportation Expenditure Plan (TEP)).

The 1988 TEP allocated various levels of funds to Caltrain improvements and Caltrain grade separations, paratransit service, six categories of highway projects, local streets and roads, transportation system management, and bicycle transportation.

The 1988 TEP specified that Caltrain Improvements was the first priority, and all other categories were second priorities.

In 2004, the voters approved the extension of the Measure A sales tax for an additional 25 years beginning in 2009, with revenues to be allocated in accordance with a new TEP (New Measure A and 2004 TEP).

The 2004 TEP provides that tax revenues are to be distributed 30% to Transit, 27.5% to Highways, 22.5% to Local Streets and Transportation, 15% to Grade Separations, 3% to Pedestrian and Bicycle projects, and 1% to Alternative Congestion Relief programs. The 2004 provides for formula-based allocations for the BART extension to San Francisco Airport and paratransit (both within the Transit Category), and the Local Streets and Transportation Category. Funds for all other categories and programs are distributed at the discretion of the Board consistent with the four Goals and Objectives set forth in the 2004 TEP and the Strategic Plan developed as required by the 2004 TEP and its included Implementation Guidelines. The 2004 TEP also states that dollar numbers included therein are estimates of Project/Program costs and of Measure A and other funding, all in 2004 dollars. The 2004 TEP makes clear that none of these dollar amounts are intended to be funding commitments.

In general, projects listed in the 1988 TEP are eligible for funds raised under the Original Measure A and projects listed in the 2004 TEP are eligible for funds raised under the New Measure A. The 2004 TEP also includes some guidelines for allocating the remainder of Original Measure A tax revenues to complete projects already commenced under the 1988 TEP, and thereafter to reallocate any further balance in accordance with the voters' intent expressed in the 2004 TEP.

Measure W

The San Mateo County Transit District (District) is a public transit district formed pursuant to California Public Utilities Code Sections 103000, et seq. (the "Transit District Act") and approved by the voters of the County of San Mateo in the

general election held on November 5, 1974. On January 1, 2018, the Transit District Act was amended by California Assembly Bill No. 1613 to authorize a new retail transactions and use tax and to permit the District to administer the new tax in its entirety or to delegate all or a portion of that authority to the TA.

On November 6, 2018, the voters of San Mateo County authorized the District to impose a new 30-year ½-cent sales tax in San Mateo County for transportation purposes and directed expenditure of the tax revenues consistent with an expenditure plan referred to as the “Congestion Relief Plan.” The District then tasked the TA with administering four of the five transportation program categories described in the Congestion Relief Plan, including 22.5% for Countywide Highway Congestion Improvements, 12.5% for Local Safety, Pothole and Congestion Relief Improvements, 5% for Bicycle and Pedestrian Improvements and 10% for Regional Transit Connections. The District administers the fifth category, which is 50% for County Public Transportation Systems. These investment categories are implemented with guidance from eleven Core Principles set forth in the Measure W Congestion Relief Plan.

Can funds be moved between categories listed in the expenditure plans?

No, funds generally cannot be shifted between categories. The expenditure plans explicitly list the amount or percentage of sales tax funds that must be spent on each category. However, the 2004 TEP specified that in the event that any funds from the Original Measure A program remained unexpended as of the expiration of the Original Measure A tax, the TA would reallocate such funds to complete any project that was commenced under any category in the 1988 TEP. As of the beginning of Fiscal Year 2024-25, the TA is continuing to allocate a relatively small portion of Original Measure A funds (approximately \$5 million) to active projects in the 1988 TEP within both the Caltrain and Highway categories. If any Original Measure A funds remained unexpended after reallocation to complete projects under the 1988 TEP, the funds will be allocated in accordance with the percentage distributions to the Program Categories contained in the 2004 TEP.

The 2004 Measure A TEP and the 2018 Measure W Congestion Relief Plan provide no flexibility whatsoever for the TA Board to move funding between and among categories.

What funds can be used to fix potholes?

The Measure A Local Streets and Transportation category and the Measure W Local Safety, Pothole and Congestion Relief category provide San Mateo County jurisdictions dedicated funds for local transportation projects, including pavement rehabilitation and pothole repair. Funding from other TA program categories cannot be used for stand-alone pavement rehabilitation or pothole repair projects. However, pavement rehabilitation can be included as a component of broader transportation improvement projects.

What can be modified from the Expenditure Plans? (Major vs. minor amendments and the role of the Strategic Plan)

Measure A

Public Utilities Code section 131304 requires voter approval for TA expenditure plan amendments that add or delete a project or are of major significance. Section 131301 in Article 4 of the Act, which provides that the TA has the power to “determine the use of net revenues derived from the . . . tax in conformance with the priorities established in the . . . expenditure plan,” provides that an “amendment of major significance” is one that is not in “conformance with the priorities established in the adopted county transportation plan.”

The key consideration here is the voters’ intent at the time a sales tax measure and TEP were approved. For instance, the TA Board is not empowered to take sales tax revenues from one program category and place them in another program category. In contrast, an example of a minor amendment could be clarifying or updating eligible project sponsors for a competitive funding program category with no changes to the overall program description.

Thus, an amendment which does not add or delete a project and does not have major significance, but is in line with priorities established in the 1998 and 2004 TEPs may be made by the TA Board without voter approval. Such amendments are within the TA’s function of administering the TEP pursuant to the priorities set forth in the Plan and are often made in concert with updates to the TA’s Strategic Plan, development of an individual program planning effort (e.g., Short Range Highway Plan, Alternative Congestion Relief & Transportation Demand Management Plan, etc.), or Board approval of guidelines for an upcoming Call for Projects.

Measure W

The Transit District Act makes no reference to the Measure W Congestion Relief Plan, but the text of Measure W allows the District to make administrative changes that are consistent with, and further the intent of, the Congestion Relief Plan. These changes may include, but are not limited to, the adoption of policies and procedures for implementing the Congestion Relief Plan and clarifications to such policies and procedures. All other changes generally require voter approval. (Cal. Elec. Code § 9323.)

Strategic Plan

The 1988 and 2004 TEPs require the TA to adopt (or update) a strategic plan every five years. In addition, the Measure W Congestion Relief Plan requires the TA to identify funding prioritization criteria consistent with the Core Principles for inclusion in its strategic plan. The Strategic Plans are vehicles for the Board to clarify priorities, approaches, methods and means of allocating sales tax revenues for the non-formula program categories. The Board also can choose to include guidance in the TA Strategic Plan regarding the substance of and process for consideration of minor amendments to the expenditure plans.

How do the Measure A Goals and Measure W Core Principles relate to the funding of projects?

The Measure A Goals and Measure W Core Principles are set forth in the expenditure plans and are intended to guide the distribution of funding within each category. The goals and core principles are what the TA uses for evaluation criteria to assess how well each proposed project may further the goals or principles of the applicable measure. Individual projects that are proposed for funding are not required to fully address each goal or core principle listed; rather, the mix of individual projects funded should work together to further each goal and core principle through the life of each applicable measure.

Highway Program Funding Questions

Can Measure A Highway funds be used on standalone Pedestrian/Bicycle Overcrossings?

No. "Standalone overcrossings" refers to an individual bike-ped overcrossing that is not a part of a larger highway interchange, operational or safety project. Both the 1988 and Measure A 2004 TEPs include funding for pedestrian and bicycle projects in a category listed separately from the Highway Program category of projects. Only .01% of revenues under Original Measure A were set aside for pedestrian and bicycle projects. The percentage allocation for these projects increased relatively dramatically to 3% in New Measure A. The 2004 TEP includes a non-exclusive list of potential bike-ped projects eligible for part of this 3%, including "paths, trails and bridges over roads and highways," and specifically names overcrossings of Highway 101 at or near Millbrae Avenue, Hillcrest, Hillsdale Boulevard, Ralston Avenue and Willow Road. This clearly indicates the voters' intent to fund standalone overcrossings for bicycle and pedestrian use from the 3% portion of Measure A funds in this pedestrian and bicycle program.

Can projects funded by the Measure A Highway Program include accessory/complementary bicycle and pedestrian infrastructure?

Yes. Many Highway projects include accessory/complementary bicycle and pedestrian infrastructure; examples include: US 101/Woodside (State Route 84) Interchange and Highway 1/Manor Avenue Overcrossing.

Can Measure A Highway funds be used for projects that will or may widen facilities?

Yes. The 1998 and 2004 TEPs specifically list projects that mention highway widening. However, decisions on whether projects should be designed to accommodate widening happen on a project-by-project basis by the project sponsors and owners of the facilities, such as Caltrans. Unless a project is sponsored by the TA, the TA does not have authority to make those determinations and can only consider whether or not to fund certain projects based on their eligibility for Highway Program support.

How does the New Measure A Supplemental Roadways Category allow for bicycle and pedestrian elements to be funded?

The New Measure A Supplemental Roadways Category allows for the funding of some projects not directly included in the highway system, such as arterials. Those roadway projects could include Complete Streets elements, but may not be solely pedestrian and/or bicycle infrastructure.

Can the Measure W Highway Program fund pedestrian and bicycle elements?

Yes. The Measure W Congestion Relief Plan explicitly states: "Eligible candidate projects can include bicycle and pedestrian components or facilities that are incorporated **or** enhance safety for a larger highway or interchange project." (Emphasis added.) Measure W Highway funds must be spent on projects on or across the highway system; the Congestion Relief Plan does not have a "Supplemental Roadways" subcategory comparable to New Measure A. As with under Measure A, a standalone Pedestrian and Bicycle overcrossing would not be eligible under the Measure W Highway Program.

The TA has programmed and allocated a majority of the Measure W Highway Program funds for multimodal projects with bicycle and pedestrian enhancements including pedestrian and bicycle overcrossings (e.g., East Palo Alto's US 101/University Avenue Interchange and Pedestrian/Bicycle Overcrossing).

Can the Measure W Highway Program fund projects that may widen facilities?

Yes. The Measure W Highway program funds projects designed to "provide congestion relief; reduce travel times; increase person throughput; improve highway and interchange operations, safety and access; and deploy advanced technologies and communications on the highways." Highway widening projects typically are designed to meet one or more of these goals. In addition, they may address one or more of the Measure W Core Principles.

In reality, no one project can address all of the Measure W Highway Program goals or all of the Measure W Core Principles. Perhaps more than in any other context, projects considered for funding under the Highway Program illustrate the internal tensions among the Core Principles. For instance, a project that adds a turn lane to an off-ramp could have safety benefits and reduce backups onto a mainline freeway, but that same project may not reduce vehicle miles traveled.

Santa Cruz Case

Does the Santa Cruz Case prohibit the TA from allocating Highway Program funds to projects that may widen facilities?

No. The Santa Cruz Case (*Campaign for Sustainable Transportation, et al. v. California Department of Transportation, et al.*) does not impact whether or how the TA allocates Highway Program funds, including to projects that may widen facilities.

The Santa Cruz Case involves a community group suing Caltrans and Santa Cruz County Regional Transportation Commission over the inadequacy of a project-specific EIR. A hearing on the petition for writ of mandate is scheduled for December 6, 2024 before Judge James P. Arguelles in the Superior Court of Sacramento County.

TA staff and legal counsel will continue to monitor the case. However, there is no reason the case or its outcome would have any impacts on what projects – or types of projects – receive Measure A or Measure W Highway Program funds.

Roles of Stakeholders and Decision-Makers in TA Strategic Planning and Competitive Calls for Projects (CFP)

How are different stakeholders and decision-makers involved in Strategic Planning?

Strategic Plan

The TA's five-year Strategic Plan identifies the policies, procedures, and methods for administration and expenditure of funds generated by Original Measure A and New Measure A, and 50 percent of funds generated by Measure W.

The current (2020-2024) Strategic Plan was developed through extensive, broad-based multilingual stakeholder engagement to ensure the development of a well-informed Strategic Plan that addresses the diverse interests and needs of the County.

Public outreach included:

- Community meetings, pop-up events at local farmers markets, and presentations at meetings of various organizations around the County
- A Virtual Town Hall
- Online engagement through a dedicated page on the TA website
- A public online survey publicized through SAG and TAG members, a text-blast to 40,000 randomized county residents, e-mail to numerous Community Based Organizations, schools and senior groups as well as, press releases and social media publicity
- A 30-day public comment period for the Draft Strategic Plan, including prior notice to approximately 4,500 survey respondents

Citizens Advisory Committee (CAC)

The Original Measure A established an Advisory Committee (the CAC) to advise the Authority on the administration of the 1988 TEP. The New Measure A continued this relationship relative to the 2004 TEP. The role of the CAC is to advise the TA on the administration of Measure A and Measure W by providing, upon request, input and recommendations on agenda items being presented to the TA Board. The CAC does not direct staff's work. When staff make Strategic Plan recommendations to the Board, such recommendations may take the CAC's input into account. In addition, the CAC can share its input directly with the Board. Individual CAC members have no authority to speak on behalf of the CAC.

TA Board

As referenced above, the TA is governed by a seven-member Board of Directors tasked with the administration of the Measure A 1988 and 2004 TEPs as well as four of five of the funding categories of the Measure W Congestion Relief Plan. The Board sets the overall policy direction for the TA. The Board considers input from various stakeholders and staff and adopts the Strategic Plan. In addition, the TA Board may rely upon a subset of the Board (in the form of an ad hoc committee) to work with staff on developing the final proposed Strategic Plan.

How are different stakeholders and decision-makers involved in funding decisions for categories with competitive programs?

CFP Process

As described above, the Measure A 1988 and 2004 TEPs and Measure W Congestion Relief Plan provide funding for a multitude of mobility programs in San Mateo County. While some programs call for direct, formulaic allocations (such as the Local Streets and Transportation category), other programs require programming and allocation actions by the Board, sometimes through a competitive selection process known as a "Call for Projects." The frequency of CFPs differs by program.

The five general categories of criteria that are considered for project evaluation and selection during CFPs are: Need, Effectiveness, Sustainability, Readiness, and Funding Leverage. Specific evaluation criteria are developed in the TA Strategic Plan or a Board-adopted short-range planning document. The criteria are reexamined with each TA Strategic Plan and may be modified, subject to Board approval, to retain flexibility and account for new policy directives, initiatives, and legislation that further promotes expenditure plan goals.

Staff develops project CFP funding recommendations based on input from CFP Project Review Committees. Funding recommendations from staff are then presented to the TA Board, which approves and programs the project awards, either as presented or with amendments. The Highway, Pedestrian & Bicycle, Grade Separation, Shuttle, Alternative Congestion Relief/Transportation Demand Management, and Regional Transit Connections programs use this competitive CFP process.

Project Review Committees

Project Review Committees, referred to above and also sometimes called "Evaluation Committees," are comprised of technical staff and stakeholders with interests and/or experience in relevant CFP topics. These committees score and recommend funding for projects based on selection criteria set by the TA Strategic Plan or listed in a related Board-adopted short-range planning document. For example, in the Ped/Bike CFP, the Project Review Committee often consists of county and regional technical staff (e.g., staff from Caltrans, MTC, the District, Peninsula Corridor Joint Powers Board (owner and operator of Caltrain) and volunteers from the County and/or CAG Bicycle and Pedestrian Advisory Committees.

Citizens Advisory Committee (CAC)

As with the Strategic Plan, the CAC provides input to staff for CFPs, but does not direct staff's work. CAC members generally provide input on whether proposed projects are eligible and in alignment with each Measure and its respective goals/Core Principles, but do not conduct detailed evaluation scoring as part of Project Review Committees. CAC members can also recommend additional considerations, such as limiting awarded projects to a certain score threshold to retain funding for future CFP cycles. Staff recommendations to the Board may take the CAC's input into account. In addition, the CAC can share its input directly with the Board. As above, individual CAC members cannot speak on behalf of the CAC.

TA Board

The Board's role is to consider input from staff, Project Review Committees and the CAC, as well as funding capacity, to program and allocate funds to eligible projects, and may make modifications to proposed programs of projects. As with the Strategic Plan, the Board periodically relies on an ad hoc committee of its own members to work with staff before a final proposed program of projects is presented for Board approval.

What is the role of the Measure W Citizens Oversight Committee (COC)?

The Measure W COC does not direct expenditure of funds. As required by Measure W, the COC provides oversight by reviewing and then providing to the District Board information on how tax proceeds were expended in the prior fiscal year pursuant to the following process: (a) The COC receives the District's annual audit report on the receipt and expenditure of Measure W tax proceeds and expenditures under the Congestion Relief Plan; (b) the COC holds an annual public hearing on the audit report; and (c) the COC issues an annual report on the audit results, which is then presented to the District's Board of Directors.

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