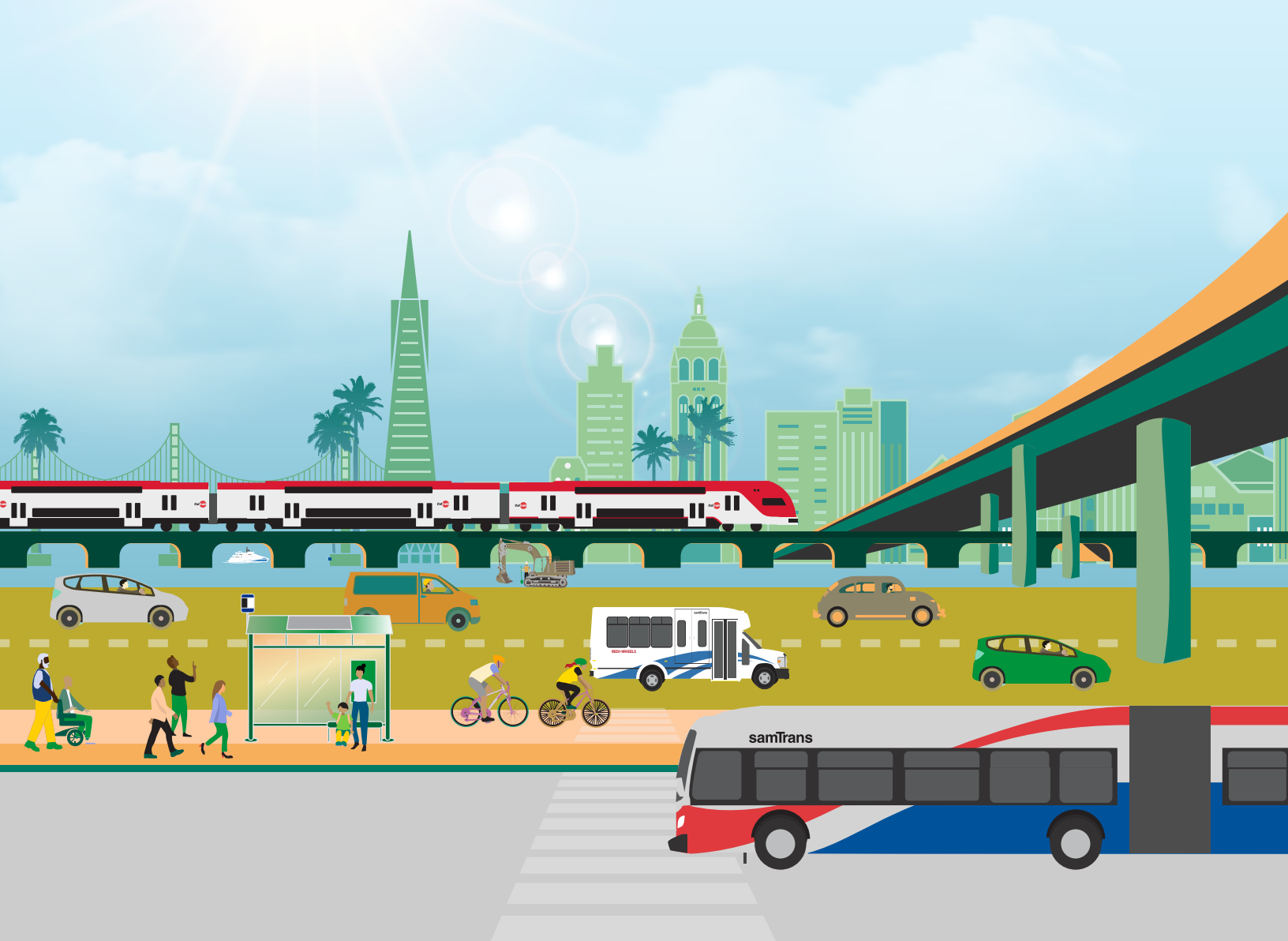




SAN MATEO COUNTY
**Transportation
Authority**



San Mateo County Transportation Authority
Strategic Plan

2025-2029

Table of Contents

1. Executive Director’s Message	3
2. Acknowledgements	5
3. Introduction	7
4. Measure A and Measure W Program Overview	10
5. Strategic Plan 2025-2029 Development Process	26
6. San Mateo County Travel Patterns and Needs	33
7. Financial Outlook	50
8. Programming, Allocation, and Monitoring Guidelines	56
9. Agreement-Based Programs Administration	64
10. Competitive Program Administration	77
11. Technical Assistance Program	114
12. Key Actions for 2025-2029	117

1

Executive Director's Message

San Mateo County and the region have come out of the COVID-19 pandemic facing major shifts in how people move around. The San Mateo County Transportation Authority (TA) and our local partner agencies have been working to adapt to travel patterns that are not solely focused on commutes to work, but also help our residents, visitors, and workers have the mobility options they need no matter how they choose to travel.



As we embarked on the development of the Strategic Plan 2025-2029, we looked back at what we accomplished in the previous five years, and we were proud to see we accomplished many of the goals identified in the previous Strategic Plan.

I am especially proud that we were able to award over \$600 million to over 250 projects in Measure A and W funding to put San Mateo County sales tax funding to important projects throughout our county. Even more exciting was the completion of major investment projects such as the 25th Avenue Grade Separation Project in the City of San Mateo, the Caltrain Station Improvement project in the City of South San Francisco, the US 101 Express Lanes Project, and the California Drive Separated Bikeway in the City of Burlingame. Additionally, we adopted three key policy documents: the Short-Range Highway Plan, Alternative Congestion Relief/Transportation Demand Management Plan, and Regional Transit Connections Plan that help shape how we evaluate and fund critical infrastructure and operations projects.

I also want to highlight how the TA's role has expanded from our primary charge as the main transportation funding agency in San Mateo County to also providing technical assistance for multiple efforts in our Highway, Pedestrian & Bicycle, and Transportation Demand Management programs. It is important we continue supporting our local cities and agencies, and help them deliver projects, especially where increased coordination is needed across jurisdictional boundaries. This support will help us see more funding put to use and help accelerate getting projects on the ground faster.

The Strategic Plan 2025-2029 provides a refreshed look at how we continue to support and integrate Measure A and W programs. Through multiple rounds of collaboration and interviews with our agency partners and community stakeholders including community-based organizations, we resoundingly heard the need to further prioritize providing more multimodal options for travel, enhancing safety, reducing vehicle miles traveled, leading more projects that require interjurisdictional coordination, and providing further technical assistance where we can. I am proud that our Board has recently approved to set aside \$2 million in sales tax interest to fund a new Technical Assistance program where we can dedicate resources to help local agencies deliver projects and secure additional grant funds.

On behalf of the TA, we hope the next five years will be an even more transformative period for transportation and mobility, and that Measures A and W can continue to be leveraged to help provide an ever-improving travel experience for our communities across San Mateo County, regardless of travel modes.

Sincerely,

A handwritten signature in black ink that reads "April Chan". The signature is fluid and cursive.

April Chan
Executive Director

2

Acknowledgements

BOARD OF DIRECTORS

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Julia Mates, Vice Chair (Representing Central County)
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3

Introduction

The purpose of the San Mateo County Transportation Authority (TA) Strategic Plan 2025-2029 (Strategic Plan) is to provide the policy framework for the implementation of San Mateo County's transportation sales tax Measures A and W. The Strategic Plan evaluates how funding is prioritized for projects proposed by Sponsors (such as county, cities, or transit agencies) and establishes future actions that the TA can help support or lead over the 2025-2029 five-year timeframe. This Strategic Plan carries forward work performed and investments made under the TA's Strategic Plan 2020-2024. Over the course of developing the Strategic Plan 2025-2029, TA staff partnered with the Board of Directors, Community Advisory Committee, local jurisdictions, transit agencies, State of California Department of Transportation District 4 Bay Area (Caltrans), City/County Association of Governments of San Mateo County (C/CAG), and other key stakeholders to update how the TA prioritizes funding allocation, expedites the administration of funds, and can improve technical assistance offerings for project implementation.

The Strategic Plan development process provided a chance for the TA to look back on achievements in six key funding areas covered by Measures A and W and carefully consider key policy updates that could better support the funding, planning, and implementation of transportation projects in San Mateo County. The Measure A Transportation Expenditure Plan and Measure W Congestion Relief Plans that were passed by the voters of San Mateo County both require the TA to adopt a new Strategic Plan every five years. The key funding areas addressed in the Strategic Plan reflect both sales tax measures and are shown in Figure 1.



Figure 1: Measures A and W Key Funding Areas

OBJECTIVES FOR UPDATING THE STRATEGIC PLAN 2020-2024

The objectives for updating the Strategic Plan 2020-2024 centered around retaining much of the policy developed previously and refreshing content to match input from local jurisdictions and other partners or stakeholders. The Strategic Plan 2020-2024 was the first effort from the TA to create a policy framework to address both the Measure A Goals and the Measure W Core Principles, which allowed the TA to create consolidated programs for many of the funding categories.

The Strategic Plan 2025-2029 development process aimed to improve transportation in San Mateo County through the following objectives:

- **Project Evaluation:** Assess the progress of projects funded in 2020-2024 and highlight notable achievements.
- **Stakeholder Engagement:** Engage agency stakeholders and Sponsors for input on how to improve internal processes, improve TA support to partner agencies and improve the TA's technical assistance offering.
- **Community Engagement:** Engage community stakeholders to gather input on their priorities are reflected in the project funding programs.
- **Grant Funding:** Optimize the Competitive Program evaluation criteria based on lessons learned and ensure projects are strategically aligned with external state and federal funding opportunities.
- **Planning Policy:** Apply new policies and integrate adopted planning efforts, such as the Short-Range Highway Plan, Alternative Congestion Relief/Transportation Demand Management Plan, and Regional Transit Connections Plan.

4

Measure A and Measure W Program Overview

4.1 MEASURE A (2009-2033)

In 1988, San Mateo County voters approved Measure A, a 20-year half-cent sales tax to fund and leverage other grant sources for transportation projects and programs in San Mateo County, organized around six primary categories for investment: Transit, Highways, Local Streets/Transportation, Grade Separations, Pedestrian and Bicycle, and Alternative Congestion Relief Programs. The approval of Measure A led to the creation of the TA to manage and administer the sales tax revenues generated in conformance with the Transportation Expenditure Plan (TEP). In 2004, San Mateo County voters reauthorized the Measure A half-cent sales tax and adopted a new TEP for an additional 25 years (from January 1, 2009, through December 31, 2033). The 2004 TEP established funding categories for Transit; Highways; Local Streets/Transportation; Grade Separations; Pedestrian and Bicycle; and Alternative Congestion Relief projects. The TEP requires the TA to develop and adopt a Strategic Plan that is updated at least once every five years.

GOALS

The Measure A TEP aims to:

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

KEY STRATEGIES

To achieve these goals the Measure A TEP vision has also set forth several key strategies:

- Target key, congested corridors for highway and transit
- Continue to improve connections with regional transportation facilities
- Enhance safety in all aspects of the transportation system
- Meet local mobility needs, especially those of seniors and people with disabilities
- Meet the cities' and county's unique local transportation needs
- Leverage local, state and federal funds
- Encourage transportation projects that support transit-oriented development

4.1.1 Program Category Details

The percentage distribution of each program category is reflected in Figure 2. These funds may be used for transportation programs and projects as allowed in the TEP and for projects within San Mateo County, with the exception for Caltrain improvements and other projects that minimally extend into adjacent counties.

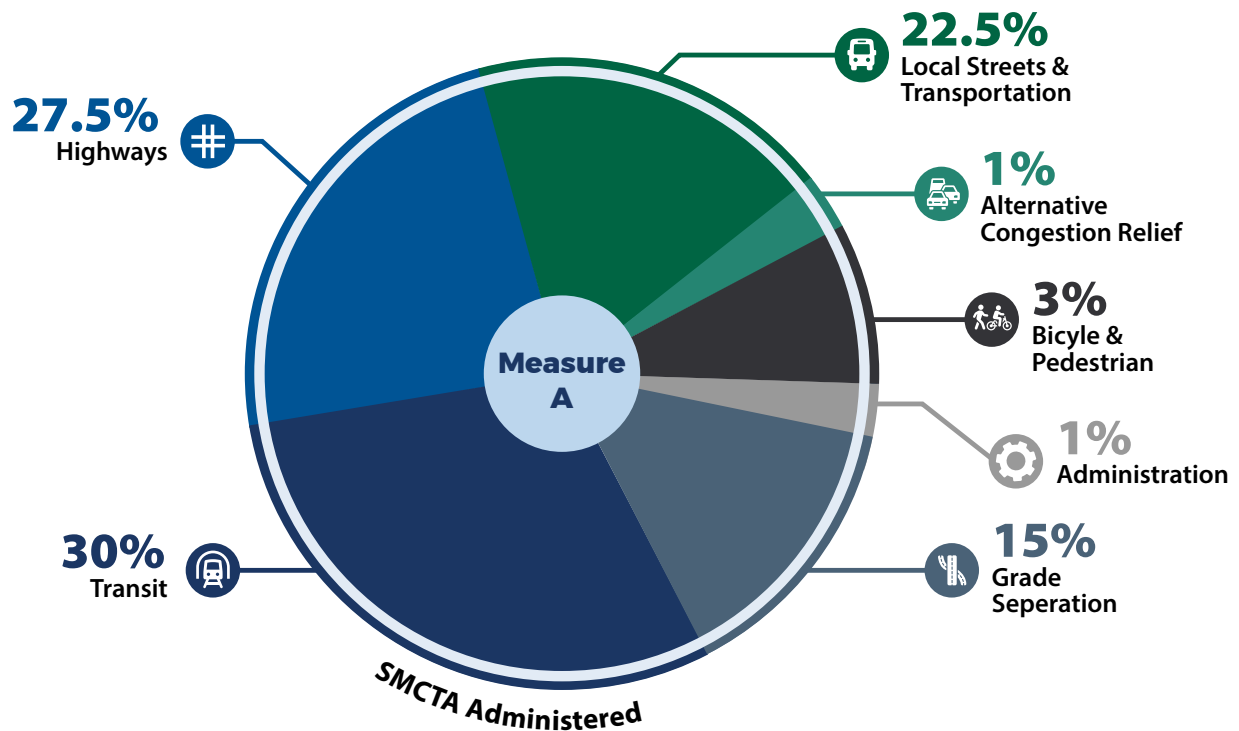


Figure 2: Measure A (2009-2033) TEP Program Categories

The TEP outlines restrictions in the use of Measure A funds with the purpose of targeting funding to transportation projects in San Mateo County and maximizing the leveraging of other funding sources:

- Measure A funds may not be used to supplant existing funds and resources on projects
- Measure A funds may be used only for transportation programs and projects as allowed in the TEP
- Projects must be within San Mateo County, apart from system-wide Caltrain improvements and other projects that minimally extend into adjacent counties
- The TEP further provides that “listed” projects are to be included in each Strategic Plan. Partial lists of candidate projects eligible for Measure A funding are included in the TEP for the Highways, Grade Separations, and Pedestrian and Bicycle program categories. The TA may from time to time update the list of projects. Projects can be further considered beyond those lists, and all projects which have received funding from Measure A previously but have not been fully funded, may be considered in addition listed projects and are referred to as “pipeline projects.” Pipeline projects are important to consider for TA funding purposes to help see investments through to completion. The TA can also deprogram funding for a project, and thus remove a listed project from the Strategic Plan, if requested by the Sponsor or if a Sponsor fails to meet its obligations under the terms and conditions of the agreement governing TA support for the project.

An inventory of listed projects, contained in **Appendix B**, will be updated as needed and included in each subsequent Strategic Plan during the life of Measure A. The inventory of listed projects is not intended to be a comprehensive list of projects selected for funding from all the Measure A programs in the past, nor an inventory of all projects eligible for Measure A funds in the future. A description and purpose of each Measure A Program category is outlined in Table 1.

Program Category	Description	Purpose
Transit (30%)		
<i>Caltrain (16%)</i>	Existing commuter rail system providing train service in San Francisco, San Mateo, and Santa Clara Counties	Upgrade and expand Caltrain systemwide services and San Mateo County specific improvements; up to one half of funds may be used to support operations
<i>Local Shuttles (4%)</i>	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
<i>Accessible Services (4%)</i>	Targeted transportation services for people that have special mobility needs	Provide paratransit and other transportation services to eligible seniors and people with disabilities
<i>Ferry (2%)</i>	Transit service provided by vessels on waterways	Provide infrastructure to support ferry services in San Mateo County
<i>BART (2%)</i>	Existing heavy rail system providing train services in San Francisco, San Mateo, Alameda and Contra Costa counties	Maintain and operate BART extension in San Mateo County
<i>Dumbarton Corridor (2%)</i>	A key rail corridor, currently in a state of disrepair, connecting the East Bay with the Peninsula	Construct stations and rail corridor improvements in East Palo Alto, Menlo Park and Redwood City
Highways (27.5%)		
Key Congested Areas (17.3%)	Highways in San Mateo County	Reduce congestion and improve safety on highways
Supplemental Roadways (10.2%)	Local, collector, arterial, state route roadways in San Mateo County	Reduce congestion and improve safety on roadways
Local Streets / Transportation (22.5%)	Transportation services, roadways owned and maintained by the cities and County of San Mateo	Improve and maintain local transportation facilities and services
Grade Separations (15%)	Eliminate at-grade railroad crossings	Improve safety and relieve local traffic congestion
Pedestrian and Bicycle (3%)	Pedestrian and bicycle facilities	Encourage walking and bicycling
Alternative Congestion Relief Programs (1%)	Commute alternatives and Intelligent Transportation Systems	Encourage efficient use of transportation network and reduce reliance on automobiles

Table 1: Measure A Program Description and Purpose

Note: Up to 1% of Measure A funds may be used for TA staff salaries and benefits

4.2 MEASURE W (2019-2049)

In 2018, San Mateo County voters approved Measure W, a 30-year half cent sales tax, from July 1, 2019, through June 30, 2048, to fund and leverage additional funding for transportation projects and programs in San Mateo County that are consistent with the Measure W Congestion Relief Plan. Measure W bolsters the successes of Measure A and helps continue transportation improvements for a fast-growing and changing county. This program, alongside Measure A, gives San Mateo County the ability to generate additional external resources to better meet the county's mobility needs with a large emphasis on transit programs. Measure W provides additional funding for transportation projects and programs in San Mateo County to implement transportation improvements as identified in the Measure W San Mateo County Congestion Relief Plan, which is organized around five investment categories: Countywide Highway Congestion Improvements; Local Safety, Pothole and Congestion Relief Improvements, Bicycle and Pedestrian Improvements, Regional Transit Connections, and County Public Transportation Systems.

The Measure W Congestion Relief Plan sets the program categories and percentage splits of the sales tax revenues with guidance from Measure W's eleven Core Principles:

- Relieve traffic congestion countywide
- Invest in a financially-sustainable public transportation system that increases ridership, embraces innovation, creates more transportation choices, improves travel experience, and provides quality, affordable transit options for youth, seniors, people with disabilities, and people with lower incomes
- Implement environmentally-friendly transportation solutions and projects that incorporate green stormwater infrastructure and plan for climate change
- Promote economic vitality, economic development, and the creation of quality jobs
- Maximize opportunities to leverage investment and services from public and private partners
- Enhance safety and public health
- Invest in repair and maintenance of existing and future infrastructure
- Facilitate the reduction of vehicle miles traveled, travel times and greenhouse gas emissions
- Incorporate the inclusion and implementation of complete street policies and other strategies that encourage safe accommodation of all people using the roads, regardless of mode of travel
- Incentivize transit, bicycle, pedestrian, carpooling, and other shared-ride options over driving alone
- Maximize potential traffic reduction associated with the creation of housing in high-quality transit corridors

4.2.1 Program Category Details

The fifty percent (50%) of Measure W funds dedicated to County Public Transportation Systems are administered by the San Mateo County Transit District (District), which owns and operates the SamTrans fixed-route bus system, as well as paratransit and microtransit services. The TA administers the other fifty percent (50%) of Measure W funds, which are dedicated to program categories for: Countywide Highway Congestion Improvements, Local Safety, Pothole and Congestion Relief, Bicycle and Pedestrian Improvements, and Regional Transit Connections. The percentage distribution of

each category is reflected in Figure 3. Local Investment Share and Grade Separation funds come from the Local Safety, Pothole, and Congestion Relief Improvements Program Category. Table 2 provides a description and purpose of each Measure W Program Category.

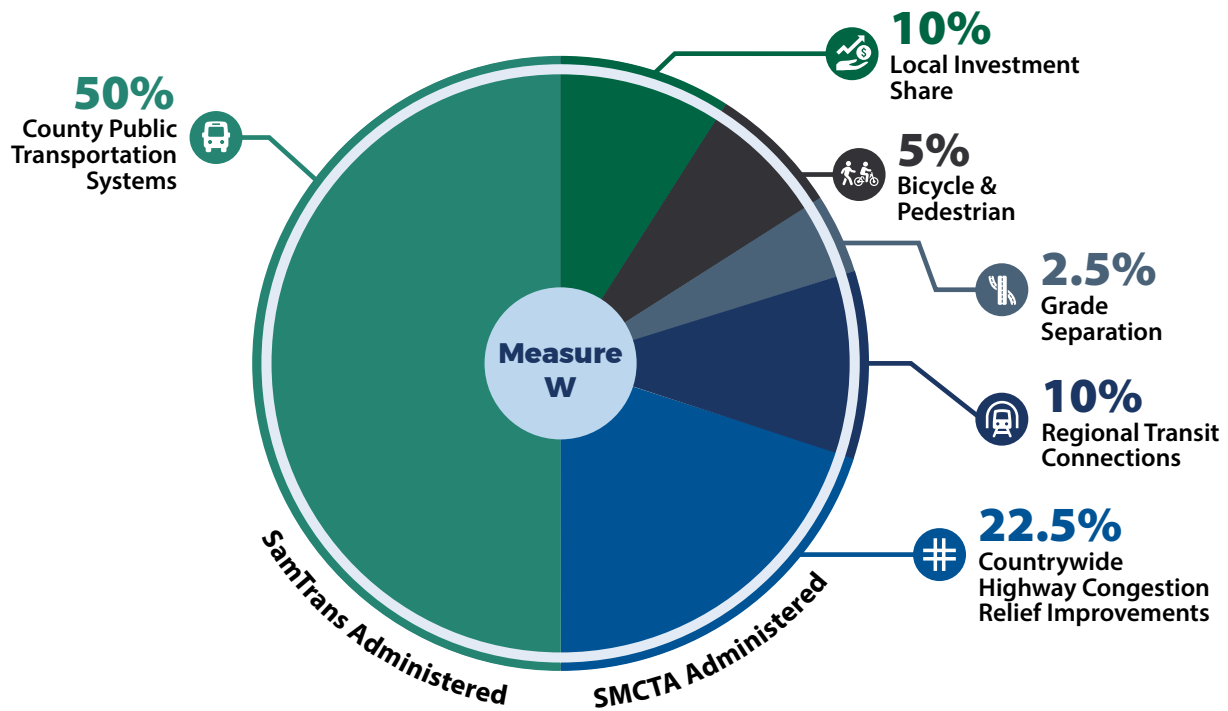


Figure 3: Measure W (2019-2049) Congestion Relief Plan Program Categories

Program Category	Description	Purpose
Countywide Highway Congestion Improvements (22.5%)	Focus on improvements to state highways and interchanges	Provide congestion relief, reduce travel times, increase person throughput, improve highway and interchange operations, safety and access, and deploy advanced technologies and communications on highway facilities in San Mateo County
Local Safety, Pothole & Congestion Relief Improvements - Local Investment Share (10%)	Local transportation programs and services; funds must be used for pavement rehabilitation if a city or the county has a Pavement Condition Index (PCI) Score less than 70	Investment in local transportation priorities including deployment of advanced technologies and communications on roads, paving streets and repairing potholes, and promoting alternative transportation
Local Safety, Pothole & Congestion Relief Improvements - Grade Separations (2.5%)	Separation of roadways crossing rail corridors	Elimination of rail crossings helps reduce local congestion and greenhouse gas emissions
Bicycle and Pedestrian Improvements (5%)	Bicycle and pedestrian programs and projects that incentivize mode shift to active transportation	Reduce traffic congestion by safely connecting communities and neighborhoods with schools, transit and employment centers; fill gaps in the existing bicycle/pedestrian network and safely cross barriers, and make walking and bicycling safer and more convenient
Regional Transit Connections (10%)	Services designed to improve transit connectivity between the county and the region, including rail, water transit, and regional bus service	Reduce congestion and improve transit connectivity between the county and the rest of the region, considering a project's support through public private partnerships
County Public Transportation Systems (50%)	Funds for public transportation that are administered by the District	Maintain and enhance bus, paratransit, Caltrain and other countywide mobility services

Table 2: Measure W Program Description and Purpose

4.3 MEASURES A AND W IN MOTION

In total, the TA awarded and allocated \$609 million to over 259 projects and plans across San Mateo County in 2020-2024. The TA will be awarding one last Call for Projects (CFP) in December 2024 for the Measures A and W Bicycle & Pedestrian and ACR/TDM funds. These awards will allocate the remaining funds accrued within the two categories.

4.3.1 Measures A and W Budget and Awards

MEASURE A

Table 3 below summarizes the approved budget totals and the funds the TA awarded or programmed for Measure A from the FY 2020-2024 plan. A year-by-year list of funding allocated for each category is shown in [Appendix B](#). Key programs and projects have been highlighted to show how funds are being utilized across San Mateo County.

Categories	Funding Accrued	Funds Awarded or Programmed
Administration (1%)	\$4,920,315	\$4,920,315
Local Streets and Transportation (22.5%)	\$110,707,097	\$110,707,097
Transit (30%)	\$145,138,207	\$127,472,524
Highways (27.5%)	\$135,308,673	\$194,241,000*
Grade Separations (15%)	\$49,370,314	\$32,376,000
Alternative Congestion Relief Programs (1%)	\$4,920,133	\$4,374,000
Pedestrian and Bicycle (3%)	\$14,760,946	\$14,311,203
Total	\$465,125,685	\$488,402,139*

Table 3: Measure A Total Funding Budgeted by Category FY 2020-2024

*Funds have been accruing since the 2017 CFP as the TA waited to finish the Short-Range Highway Plan (SHRP) before conducting another CFP which allowed for more money to be allocated than was accrued during this period.

All categories, besides Administration, must be programmed and awarded funding. Pass-through categories, including funds to local cities for transportation services, local roadways, and Administration, are automatically programmed with the adoption of each fiscal year budget. The Local Streets and Transportation category is pass-through to local cities for transportation services and roadways owned and maintained by the cities and County of San Mateo.

Of the total \$465.1 million TA funds accrued for Measure A Projects and Programs, the TA has awarded or programmed a total of \$488.4 million. Table 4 summarizes the 151 projects and programs that have received funding through Measure A. Funds awarded through FY 2020–2024 have generally remained within the accrued amount except for the Highways category. Highway funds have been accruing since the 2017 CFP and the TA applied those funds to project awards during the FY 2020-2024 CFP cycles.

Categories	Subcategory	Number of Projects/Programs
Transit	Caltrain	4
	Local Shuttles	113 (24 Active Routes)
	Ferry	2
Highways		7
Grade Separations		4
Alternative Congestion Relief		5
Pedestrian and Bicycle		16
Total Projects and Programs Funded		151

Table 4: Measure A Total Number of Projects and Programs Funded FY 2020-2024

MEASURE W

Table 5 below summarizes approved budget totals that the TA could award under Measure W during fiscal years (FY) 2020 through 2024. A year-by-year list of funding allocated for each category is shown in **Appendix B**. Key programs and projects have been highlighted to show how funds are being utilized across San Mateo County.

Categories	Funding Accrued	Funds Awarded or Programmed
TA Administration and Oversight*	\$697,584	\$697,584
Local Safety, Pothole, and Congestion Relief (12.5%)	\$61,460,344	\$61,460,344
Regional Transit Connections (10%)	\$49,028,758	\$450,000
Countywide Highway Congestion Relief Improvements (22.5%)	\$110,314,706	\$40,634,490
Bicycle and Pedestrian Improvements (5%)	\$24,514,379	\$16,756,042
Total	\$246,015,771	\$120,898,460

Table 5: Measure W Total Funding Budgeted by Category FY 2020-2024

*Measure W Administrative and Oversight were allocated 1-1.5% from the Categories in FY 2024 and prior years. Starting in FY 2025, these areas are being funded by Measure W interest income only.

All categories besides TA Administration and Oversight must be programmed and awarded funding. For many pass-through categories such as Local Safety, Pothole, and Congestion Relief, the funding is automatically programmed with the adoption of each fiscal year budget.

Of the total \$246.0 million allocated TA funds accrued for Measure W Projects and Programs, the TA has awarded or programmed a total of \$120.9 million. Table 6 summarizes the 108 projects and programs that have received funding through Measure W. Measure W funds awarded through FY 2020-2024 have remained below the accrued amount. Regional Transit Connections (RTC) awards are currently awaiting final adoption at the time of this writing; the TA has not awarded any funds from that category aside from creating the RTC plan. Additionally, the TA has been preserving Countywide Highway Congestion Improvement funds for multimodal projects.

Categories	Subcategory	Number of Projects/Programs
Regional Transit Connections (10%)		1
Countywide Highway Congestion Improvements (22.5%)	Congestion Improvements	14
	Transportation Demand Management (TDM)	15
Bicycle and Pedestrian Improvements (5%)	CFP Awards	22
	Safe Routes to Schools (SRTS) Programs and Audits	56
Total Projects and Programs Funded		108

Table 6: Measure W Total Number of Projects and Programs Funded FY 2020-2024

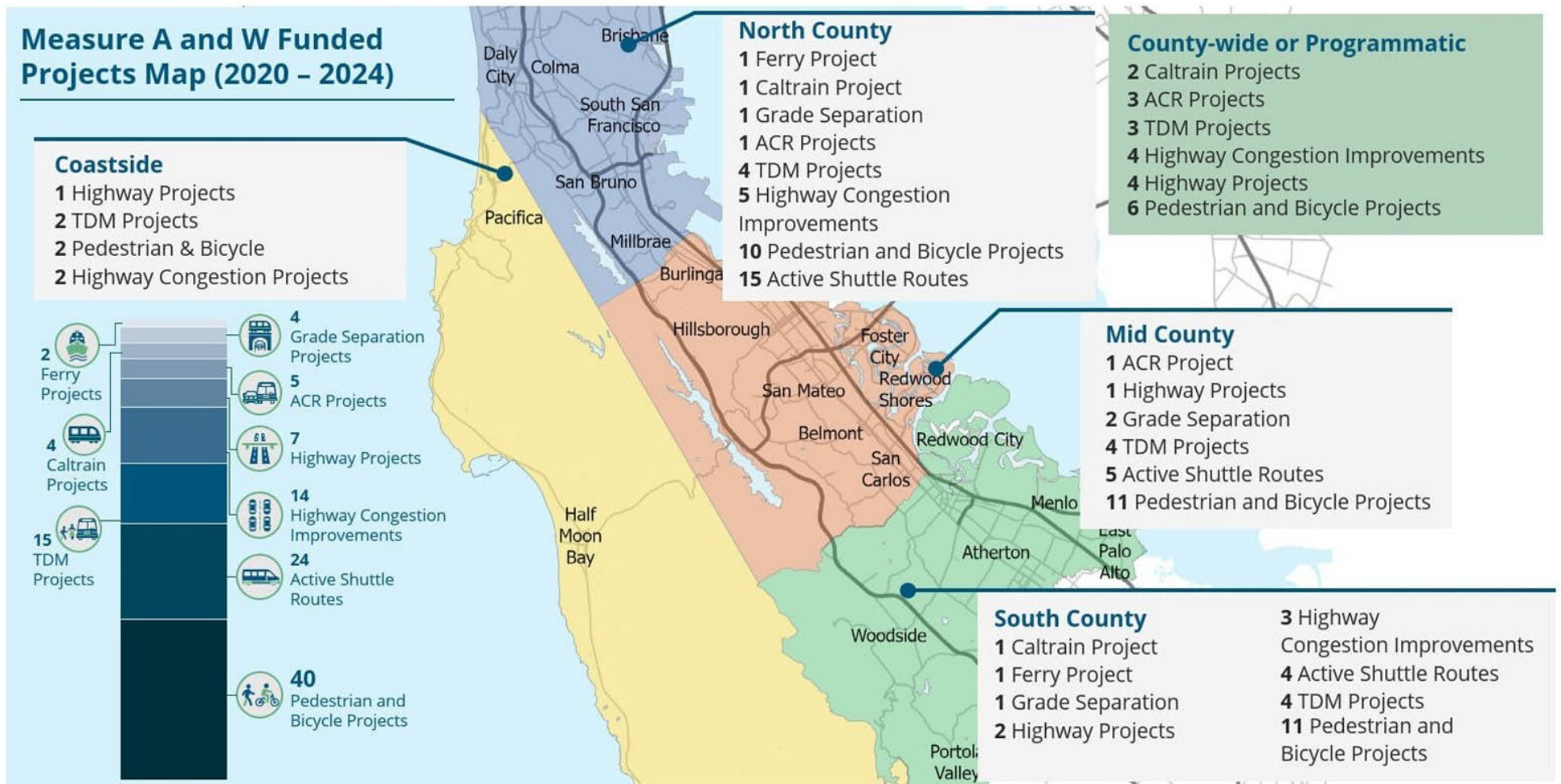


Figure 4: Measures A and W Projects and Programs Funded FY 2020-2024

Allocated Funds from Measure A and W (2020 - 2024)

\$609M

Total funding allocated or awarded to transportation projects in San Mateo County.

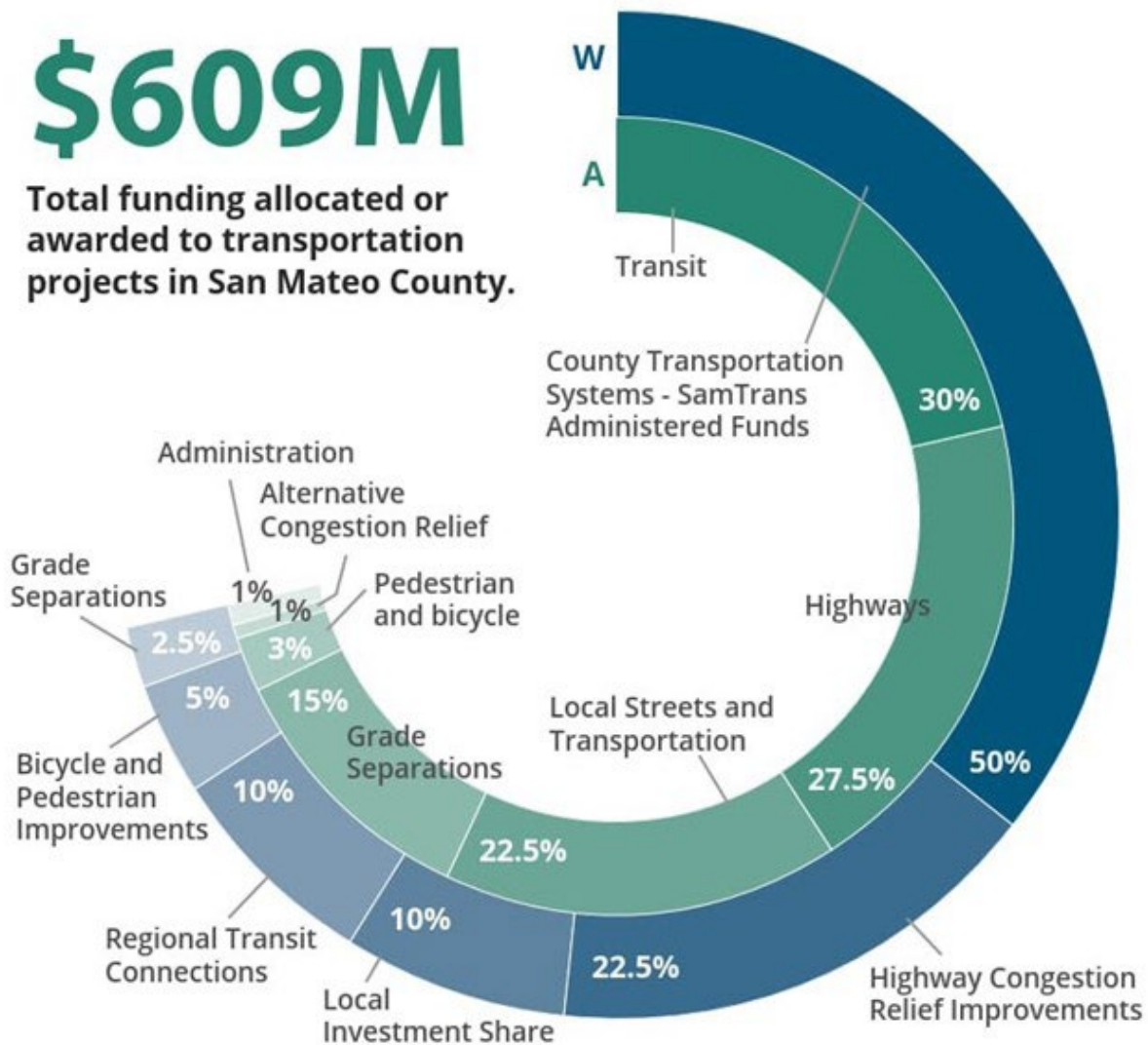


Figure 5: Measures A and W Allocated Funds FY 2020-2024

4.3.2 Key Projects and Programs

Measures A and W have funded several key projects and programs over the past five years, including:

MEASURE A

Transit

- Caltrain upgrades and improvements:
 - South San Francisco Station (completed construction)
 - Atherton Station Closure (under construction)
 - Peninsula Corridor Electrification Project (completed construction)

- Ferry upgrades and improvements:
 - Redwood City Ferry Project (Preliminary Engineering and Environmental Phase)
 - South San Francisco Ferry Terminal Project (Planning and Pre-environmental Phase)
- Shuttle funds: 113 shuttles funded to meet local mobility needs and connect areas to transit stations.

Highways

- Projects completed and closed out:
 - Route 1 Safety & Operational Improvements Project (Wavecrest Road - Poplar Street, Half Moon Bay)
 - Railroad Avenue Extension Project (South San Francisco)
 - San Pedro Creek Bridge Replacement Project (Pacifica)
- Projects nearing completion and in final stages of construction or landscaping:
 - US 101 / Broadway Interchange Project (Burlingame)
 - US 101 / Willow Interchange Project (Menlo Park)
 - US 101 Express Lanes Project (I-380 to Santa Clara County)
 - Highway 92 / El Camino Real Interchange Project (San Mateo)

Grade Separations

- Projects in progress or completed:
 - 25th Avenue Project (San Mateo)
 - Whipple Avenue (Redwood City)
 - Broadway Project (Burlingame)
 - South Linden Avenue/Scott Street (South San Francisco)

Pedestrian & Bicycle

- Projects completed and closed-out:
 - Middlefield Road Class II Bike Lanes (Atherton)
 - Enhanced Pedestrian & Bicycle Visibility Project (Daly City)
 - Kennedy SRTS Project, Jefferson/Cleveland SRTS & Peninsula Bikeway Project, and Highway 101 Pedestrian and Bicycle Undercrossing (Redwood City)
 - El Camino Real/Angus Avenue Intersection Improvements and Transit Corridor Pedestrian Connection Project (San Bruno)
 - Sunshine Gardens Safety and Connectivity Project (South San Francisco)
 - San Carlos Avenue Pedestrian and Bicycle Improvement Project (San Carlos)
 - Class II & III Bike Facilities Project (East Palo Alto)
 - 28th Avenue Bike Boulevard Implementation Project (San Mateo)
 - San Mateo Drive Pedestrian and Bicycle Improvement Project (San Mateo)

- Burlingame Station Pedestrian Improvements Project and California Drive Class IV Bikeway (Burlingame)
- Menlo Park Bike/Ped Enhancement Project (Menlo Park)
- Eucalyptus Avenue Streetscape & SRTS Project (Hillsborough)
- Eucalyptus Pathway Project (Hillsborough)

ACR

- Programs with ongoing or one-time support:
 - Commute.org's Operations and TDM Monitoring
 - County TDM Monitoring Program and San Mateo County Express Lanes Joint Powers Authority (JPA) Equity Program

MEASURE W

Countywide Highway Congestion Relief Improvements

- Transportation Demand Management (TDM)
 - Pedal for Purpose E-Bicycle Pilot Program (Half Moon Bay)
 - Eucalyptus Pedestrian Pathway Project (Hillsborough)
 - Essential Wheels E-Bike Loaner Program (Redwood City)
 - Burlingame and Millbrae Bicycle Sharing Program (Burlingame and Millbrae)

Bicycle and Pedestrian

- Completed Projects and Programs:
 - Burlingame Station Pedestrian Improvements (Burlingame)
 - Ralston Avenue Corridor Project- Segment 3 (Belmont)
 - Vision Zero Community Outreach Program (Daly City)
- Safe Routes to School (SRTS)
 - Four CFPs – 48 projects awarded
 - Walking audits at 8 schools

4.4 PLANS AND PROGRAMS

One of the key next steps identified in the previous Strategic Plan 2020-2024 was to update and create plans and programs to help guide the allocation of Measure A or Measure W funds that guide transportation-related improvements throughout the county. Table 7 summarizes the relevant TA Plans and Programs, along with other related County and Regional Plans and Programs.

TA PLANS AND PROGRAMS HIGHLIGHTED PROGRESS

Source	Description and Connection to Funding Measures
<p><u>Short-Range Highway Plan (SRHP): 2021-2030</u></p>	<p>The SRHP establishes a strategy for directing Measures A and W funding towards highway improvements in San Mateo County. This plan also includes a policy framework for making investment decisions. This plan considers twenty-two existing projects and eight new projects for Measures A and W funding. Through the SRHP, the TA established the criteria to decide which highway projects are of countywide significance such that the TA could sponsor the projects itself. Of the thirty listed projects, seven meet the criteria for countywide significance. This plan decides the costs and benefits of projects and will allow the TA to assign scores for projects when responding to funding requests. Lastly, the SRHP highlights the challenges in delivering \$2.9 billion in eligible highway projects.</p>
<p><u>2021-2030 Highway Capital Improvement Program (CIP)</u></p>	<p>The Highway CIP was developed to assess the cost of proposed highway improvements for San Mateo County and compare the costs to projected Measures A and W sales tax revenues over the next 10 years. The CIP reviews the thirty projects, estimates their costs, and compares these projects' needs to projected sales tax revenues.</p>
<p><u>Alternative Congestion Relief (ACR)/Transportation Demand Management (TDM) Plan</u></p>	<p>The ACR/TDM Plan, adopted in 2022, is a guide for initiating and selecting projects and programs for the Measure A ACR category and Measure W TDM subcategory. These programs and projects are to help reduce automobile use, and to incentivize and create efficient sustainable transportation networks. The ACR/TDM Plan functions as a guide for a TDM call-for-projects cycle and created dedicated subcategories for Measure A Plan-based initiatives, such as providing funding for Commute.org operations and the Countywide TDM Monitoring Program. This plan received the American Planning Association California Transportation Planning Award of Merit.</p>
<p><u>101 Corridor Connect</u></p>	<p>The 101 Corridor Connect program looks at ways to improve active transportation, public transportation, and highway and local road improvements within one mile of either side of highway 101 in San Mateo County. The program is divided into three focus areas: North County, Mid County, and South County. The strategies look at how people and goods get around within these sections and recommends a list of transportation improvement projects.</p>
<p><u>Regional Transit Connection Plan (RTC)</u></p>	<p>The RTC Plan, adopted in 2024, provides long-term policy guidance and financial planning for 10% of Measure W funds through competitive grant programs. These programs will fund transit improvements that connect San Mateo County with its adjacent counties.</p>

Table 7: TA Plans and Programs

RELATED COUNTY & REGIONAL PLANS AND PROGRAMS

There are several recently completed or ongoing transportation planning efforts in San Mateo County which utilize, reference, and support the use of Measures A and W funds towards mobility projects and plans across San Mateo County.

- Metropolitan Transportation Commission (MTC) Plan Bay Area 2050+
- MTC Bay Area Express Lane Strategic Plan
- MTC Regional Active Transportation Plan & Complete Streets Policy
- California Department of Transportation District 4 (Caltrans) Bike & Pedestrian Plans
- Caltrans US 101 South Comprehensive Multimodal Corridor Plan
- US 101 Mobility Action Plan
- City/County Association of Governments of San Mateo County (C/CAG) Countywide Transportation Plan
- C/CAG Comprehensive Bicycle and Pedestrian Plan (CBPP)
- C/CAG Congestion Management Program
- C/CAG Local Road Safety Plan
- C/CAG and TA Countywide Automated Vehicles Strategic Plan
- San Mateo County Transit District's Reimagine SamTrans
- SamTrans Express Bus Feasibility Study
- SamTrans El Camino Real Speed & Reliability Study
- SamTrans Strategic Plan & Capital Improvement Program
- Caltrain Business Plan
- Caltrain Corridor Crossings Strategy
- Caltrain Capital Improvement Program
- Commute.org Strategic Plan 2025
- San Mateo County Express Lanes JPA US 101 Equity Study

5

**Strategic Plan
2025-2029
Development
Process**

5.1 SUMMARY OF WORK FOR STRATEGIC PLAN

The previous Strategic Plan 2020-2024 created the first consolidated Strategic Plan that aligned the Measure A Goals and Measure W Core Principles to have one set of programs, guidelines, and policies. The Strategic Plan 2020-2024 included an assessment of Measures A and W program categories, stakeholder engagement, public outreach, and initiatives to improve project delivery. It also combined the evaluation process and criteria across the Measures A and W goals and core principle weights (**Appendix H**). The Strategic Plan 2025-2029 proposed recommendations on areas of improvement and efficiency based on the experiences and lessons learned from the past five years.

5.2 INTEGRATION OF STANDALONE POLICY DOCUMENTS

Since the adoption of the previous Strategic Plan 2020-2024, there have been multiple plans and programs adopted by the TA that provide updated program guidelines and policies which have been integrated into the Strategic Plan 2025-2029.

5.2.1 Recently Completed Plans & Programs

2021-2030 SHORT-RANGE HIGHWAY PLAN (SRHP)

The TA developed a policy framework for making investment decisions in the SRHP that established a strategy for how to direct Measures A and W sales tax revenues toward highway improvements in San Mateo County. The SRHP complements the Strategic Plan by providing technical metrics that allow the TA to use the Strategic Plan evaluation criteria to uniformly assign scores to projects for the Measures A and W Highways program CFP cycles. Additionally, the SRHP established a definition of Countywide Significance for the TA, specific to the competitive Highways program where projects must meet at least two of the following screening criteria:

- Project serves a significant amount of through traffic
- Project serves a significant amount of inter-county traffic
- Project significantly improves connections between two or more geographic areas of the county
- Project significantly improves access to a major activity center

The Countywide Significance definition in the Strategic Plan 2025-2029 is revised to require that projects meet at least two of the following screening criteria:

- Project serves a significant amount of person throughput, inclusive of all modes
- Project serves a significant amount of inter-county traffic
- Project significantly improves connections between two or more geographic areas of the county
- Project is a priority component of a countywide or regional multijurisdictional effort

This updated definition reframes traffic throughput as person throughput to be more inclusive of all transportation modes and removes the screening criteria of improving access to major activity centers that was included in the SRHP definition.

2021-2030 HIGHWAY CAPITAL IMPROVEMENT PROGRAM (CIP)

The TA developed the Highway CIP by working with eligible highway Sponsors, which include cities, the County of San Mateo, C/CAG, and Caltrans. Through a project inventory process, the Highway CIP established a list of previously and newly submitted Highway projects organized by project phase with associated baseline cost estimates. This list of projects included in the Highway CIP, along with the list of projects in the Measures A and W Expenditure Plans, informs which projects are eligible to apply for funding during the Measures A and W Highways CFP cycles. The Highway CIP sets the stage for the TA to allocate Measures A and W funds to the highest-performing projects in the areas of San Mateo County that show the greatest need.

ALTERNATIVE CONGESTION RELIEF/TRANSPORTATION DEMAND MANAGEMENT PLAN (ACR/TDM)

The ACR/TDM Plan sets the program guidelines and policies for the competitive TDM program, which consists of the Measure A ACR program category and the Measure W TDM program category. Since the competitive TDM program was not included in the Strategic Plan 2020-2024, the program guidelines, policies, and evaluation criteria adopted in the ACR/TDM plan have directly informed the competitive TDM program CFP process. Furthermore, the program guidelines and policies adopted in the ACR/TDM plan have been used to inform updated guidelines and policies for other competitive funding programs.

REGIONAL TRANSIT CONNECTIONS PLAN (RTC)

The RTC Plan establishes the program guidelines and policies for the competitive Measure W RTC program. The RTC Plan formally sets program goals, guidelines, subcategories, and policies that directly inform the CFP process for the competitive RTC program. Furthermore, the RTC Plan amends the project evaluation and selection methodology included in the Strategic Plan 2020-2024, providing updated evaluation criteria and thematic areas for 2025-2029. These updates will be the basis for the first CFP for the competitive RTC program, planned for Spring 2025.

The plan also includes a CIP that identifies projects that may be eligible for funding from the RTC program and will assist in long-term policy guidance and financial planning for the program. The projects included aim to meet the RTC program's main goal of reducing congestion and improving transit connectivity between San Mateo County and the connecting counties. The CIP provides an example of projects that may be eligible for the program and is not an exhaustive list of all potential projects that could receive funding from the program. Allocations of funding will be determined by a CFP process that will take place on a four-year cycle.

5.3 STAKEHOLDER OUTREACH

The Strategic Plan 2025-2029 stakeholder outreach effort has focused on the following objectives:

- Review projects funded and completed between 2020 and 2024, along with past progress and accomplishments
- Hear from partners and Sponsors about how the TA may be able to improve processes or provide additional support
- Refresh data on San Mateo County demographics, travel patterns, funding projects, and grant funding conditions
- Update and review with stakeholders and Sponsors competitive evaluation criteria to align with state and federal funding programs and promote equity
- Update program administration by standardizing guidelines, policies, and monitoring requirements along with formalizing the intent of the TA's Technical Assistance Program
- Integrate standalone planning/policy efforts into the Strategic Plan framework (including the SHRP, ACR/TDM Plan, and RTC Plan)

5.3.1 Workshops

The TA facilitated workshops with the Community Advisory Committee (CAC), TA Board of Directors members, and the C/CAG Technical Advisory Committee (TAC) in Winter 2024 to understand which Measure A Goals and Measure W Core Principles are the most important and how funding should be prioritized to help develop evaluation criteria for the selection of projects. Participants and committee members were asked to reflect on their top priorities for the TA over the next five years and weigh in on proposed changes introduced in the next strategic plan. Input from the committees will also help shape how funding is allocated over the next five years and to guide where the TA should focus their technical assistance program. In Fall 2024, each of these bodies received a presentation to provide input on resulting proposed policy changes for inclusion in the Strategic Plan 2025-2029.

5.3.2 TA Board of Directors Ad-Hoc Committee

Three meetings were held with the Strategic Plan Ad Hoc Advisory Committee of the TA Board of Directors to provide updates on the progress of the Strategic Plan to present feedback received from other stakeholders and to confirm that the proposed key actions for the updated plan align with the agency's priorities over the next five-year period.

5.3.3 Stakeholder Advisory Group and Technical Advisory Group

The TA made two presentations to the Stakeholder Advisory Group (SAG) and the Technical Advisory Group (TAG) in Spring and Summer 2024 to provide an overview of the Strategic Plan 2025-2029 and seek feedback. The SAG is comprised of representatives from non-profits, large employers, business groups, transit, and constituent advocacy groups. The TAG is comprised of representatives from the cities, county, transit agencies, special districts, and other governmental partners.

5.3.4 Partner Interviews

The TA facilitated 15 one-on-one interviews in October 2024 with representatives from project and community partners to review the proposed Key Strategies for the Strategic Plan 2025-2029 and provide the opportunity for any additional feedback.

Discussion questions were tailored to each audience to gather in-depth feedback on how each organization has navigated the existing processes with the TA and what barriers exist for organizations to access funding or actively participate in the selection of projects. Partner interview notes are in **Appendix D-4**.

Individual interviews were held with representatives from:

- Caltrain (two interviews: one with Caltrain Planning, one with Caltrain Real Estate)
- Caltrans
- City/County Association of Governments of San Mateo County
- City of East Palo Alto
- City of Half Moon Bay
- City of San Mateo
- City of South San Francisco
- Commute.org
- El Concilio (a community-based organization (CBO))
- Peninsula Chinese Business Association (CBO)
- San Mateo County Transit District
- San Mateo County
- San Mateo County Economic Development Association (Business organization)
- San Mateo County Office of Education (home agency of Safe Routes to School program)
- Silicon Valley Bicycle Coalition (CBO)

5.3.5 Outreach Themes

The workshops, as described above, with stakeholders were structured around six key discussion questions. The general themes that emerged from the comments from various stakeholders are summarized below:

1. What has been the TA's biggest accomplishment over the last 5 years?
 - Aligning the Measure W Core Principles with the Measure A Goals and seeing those values reflected in the selection and funding of transportation projects in the county.
 - Investment into grade separation and electrification projects.
 - Focus on the safety of pedestrians and cyclists.
 - Adopting a more fair geographic distribution approach to provide an opportunity for small and coastal communities to better compete for funding.
 - The distribution of local streets and roads funds provided directly to local agencies.

2. Where do you see the biggest opportunity for improvement for the TA in the next five years?
 - Strategies to streamline implementation and mobilize funding for projects faster.
 - Technical assistance for local jurisdictions that are under-resourced and/or understaffed.
 - Support for cross-jurisdictional multimodal projects.
 - Safety and improved access regardless of mode.
 - Reduction of vehicle miles travelled (VMT) and greenhouse gas emissions.
3. How should equity continue to be considered or elevated by the TA for the next five years?
 - Re-examine the definition of “equity” to better align with industry standards.
 - Leverage new relationships with CBOs and streamline compensation for their assistance on projects.
 - Support outreach in multiple languages.
 - Prioritize seeking feedback from a variety of underserved communities.
 - Place stronger focus on environmental justice and incorporate criteria for public health.
4. Are there areas TA Technical Assistance should be modified or expanded?
 - The Technical Assistance Program is incredibly important to support cities and towns in applying for funding to advance local and county-wide projects.
 - Enhance support throughout the CFP process.
 - Gain a better understanding of the biggest challenges and barriers for cities and towns applying for funding.
5. Should the definition of “countywide significance” be updated or expanded?
 - Consideration for multijurisdictional projects.
 - Expand to include multimodal projects with better pedestrian, bicycle, and transit considerations.
 - Greater focus on sustainable forms of transportation and equity.
6. Are there any other actions or considerations for the next five years we should consider that we have not discussed?
 - Consider autonomous vehicles (AV) and safety.
 - Seek creative solutions to help finance projects.

Overall, the input received from the participants was very positive. Virtually all participants stated that they felt the SMCTA staff are helpful and responsive, SMCTA processes are efficient, and communication is clear. Many also stated that they felt that SMCTA is going in the right direction, and the proposed changes outlined in the proposed key actions were well received.

The main themes from the interview participants are summarized below:

- Call for Projects:
 - Consider making the grant amounts larger as small grants can be difficult to pursue.
 - Continue streamlining grant application processes to make it easier to apply.

- Alter application processes to allow for specific project applications rather than requiring projects to fit within a single category.
- Provide examples of projects that would be eligible for funding.
- Assist with agency partnerships as multi-agency grants score better.
- Compile resources for jurisdictions to reference and help them to be more competitive.
- Technical training ideas:
 - Active transportation (e.g., bike parking, rapid implementation options)
 - EV charging
 - Parking and curbside management
 - Safe Routes to School walk audits
 - Designing with transit
 - Group facilitation
 - Grants and funding strategies
 - Level of service analysis for multi-modal projects
- CBO bench:
 - Create a CBO collaborative within the county or specific communities
 - Implement multi-year agreements
- Funding:
 - Provide assistance with tracking funding.
 - Provide implementation funds for completed planning projects.
- Other comments:
 - Ensure earlier coordination and planning of grade separation process with Caltrain and funding partners
 - Coordinate on the corridor/county level to improve planning.
 - Use highway funds to support the SamTrans Grand Boulevard Initiative (GBI).
 - Create a transportation design/review checklist.
 - Have the TA sponsor projects to better coordinate cities conducting similar work.
 - Promote the TA via social media and make presentations to industry groups. Better name recognition would assist the TA with better intersecting with businesses.
 - Ensure best practice recommendations from design reviews are not mandates.

Section 12 details how stakeholder feedback was considered in the development of key actions for the Strategic Plan 2025-2029.

6

San Mateo County Travel Patterns and Needs

This section details countywide travel patterns and assesses transportation needs within San Mateo County.

Discussions of equitable community prioritization from previous plans, existing demographics, travel patterns, and emerging transportation technologies demonstrate where San Mateo County can most effectively implement various program improvements and congestion management strategies. The COVID-19 pandemic, which occurred during the Strategic Plan 2020-2024 period, also influenced the way people live and travel in San Mateo County. While changes are evident in the near-term, the TA will monitor long-term trends to assess potential impacts to TA projects and programs.

The spatial equity metrics featured throughout this assessment reveal that equity-burdened communities in San Mateo County often face additional barriers due to pollution and lack of transit. When measured at countrywide, statewide, and local levels, these burdens remain visible in many of the same communities, such as Foster City, Redwood City, and South San Francisco. This suggests that transportation-related investments in communities with multiple overlapping needs will produce the greatest share of benefits for the entire county and lead to indirect positive impacts on VMT, daily traffic congestion, and commute times.

6.1 DEMOGRAPHICS

According to the most recent 2022 American Community Survey (ACS) 1-Year Estimates, San Mateo County has a population of 729,181 people, with a total land area of 448.6 square miles, averaging a density of 1,625 residents per square mile.

The county's unemployment rate is low (2.2%) compared to the state (4.4%), and the median income of households with at least one employed member is about \$145,388.

Due in part to a comparatively high number (18.5%) of San Mateo County residents aged 65 and older, and a median age of 41.4 years, the countywide disability rate is about 10.3%. Among residents 75 years and older, the disability rate is about 26.3%.

According to the 2020 Decennial Census, about 36% of county residents are white. The second largest population group by race is Asian (29%), followed by Hispanic or Latino (25%), Two or More Races (5%), Black or African American (2%), and Native Hawaiian or Pacific Islander (1%).

6.1.1 Change in Population By Geography

As of 2024, San Mateo County is comprised of 20 census-designated cities and towns and several unincorporated communities. Within the county, urban area populations range from 1,507 (Town of Colma) to 105,661 (City of San Mateo) residents.

Population density is largely concentrated along the Bay Area Rapid Transit (BART) and Caltrain corridors, consistent with the regional growth strategy ([Appendix C-2](#)). Population estimates were calculated in Plan Bay Area 2040 using a pre-pandemic data model that was released in 2018. Population Projection Model Estimates predict that by 2040, San Mateo County total population will increase from the projected year 2020 population of 796,925 to approximately 916,590. This would be a total projected increase of approximately 15% by 2040.

San Mateo County has a larger number of adults aged 55 or older compared to other counties. With 31.4% of San Mateo County's population aged 55 or older, its senior population is larger in percentage than San Francisco County (30.5%) and Alameda County (27.9%). In response to its growing aging population, the county will need to examine what transportation options best serve this age group, and how to grow and expand services in an efficient and effective manner. Urbanized areas around

South San Francisco, San Bruno, Millbrae, and Burlingame are likely to grow the most, with more modest increases in Daly City, Redwood City, San Carlos, San Mateo, East Palo Alto and other census-designated cities and towns (**Appendix C-2**).

6.1.2 Population Change by Age

The California Department of Finance-projected changes in population by age group are shown in Figure 6 for the period between 2020 and 2060. These projections demonstrate that populations aged 45-64 will continue to make up the largest age cohort in the county. The county will need to continue to invest in infrastructure improvements to serve the needs of the increasingly older adult population who may be aging in place and not able to rely solely on a motor vehicle for transportation over the next 30 years.

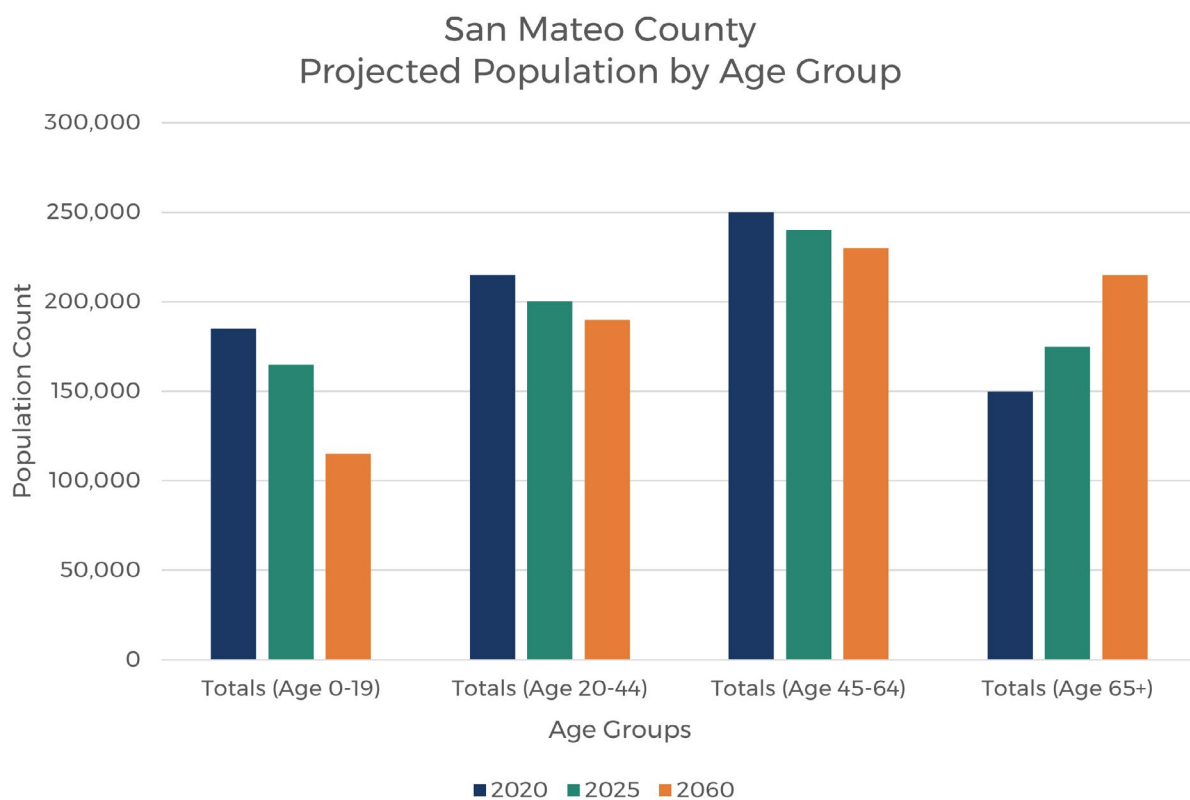


Figure 6: San Mateo County Projected Population by Age Group

Source: California Department of Finance, 2022

6.1.3 Pre-Pandemic and Post-Pandemic Demographic Overview

As shown in Figure 7, Census data shows that county population decreased between 2019 and 2022, consistent with statewide population trends. Data demonstrates that median household income and median age has increased between pre-pandemic and post-pandemic years. Growth among the population over 65 signals an expanding need for infrastructure and transportation policy that caters to a population cohort with the highest relative disability rate.

This further emphasizes the ongoing need for more inclusive universal design, transit and accessible services, and Complete Street projects throughout the county. Although median income has grown and the unemployment rate has decreased, poverty rates among non-white residents significantly increased between 2019 and 2022, underscoring the need for ongoing investment strategies that help reduce transportation cost and pollution burden and improve access to jobs across the county.

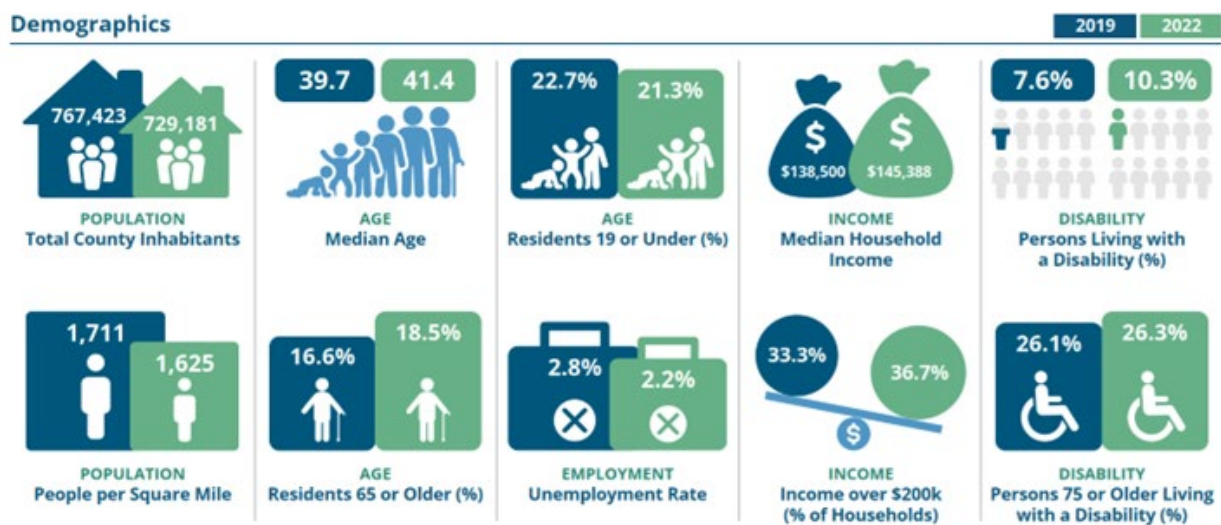


Figure 7: Pre-Pandemic and Post-Pandemic Demographic Comparison

Source: 2022 American Community Survey 1-Year Estimates, 2019 ACS 1-Year Estimates

6.2 TRAVEL TRENDS

As shown in **Figure 8**, a comparison of the mode share data for commute trips in the county from the ACS for the years 2017, 2020, and 2022 for San Mateo County residents shows that transit mode share (for rail and bus combined) has declined from 10.4% in pre-pandemic conditions to 7.3% in 2022 after the pandemic. Rates of walking to work have remained static between 2017 and 2022 at roughly 2.5%. Most significantly, the work-from-home population has increased from 4.7% in pre-pandemic conditions to almost 19% after the pandemic. Driving alone continues to be the largest mode overall, however, the percentage of total trips in the drive-alone category has steadily declined from 69% in 2017 to 59% in 2022. These trends will continue to be monitored as return-to-work requirements change over the next five years.



Figure 8: Means of Transportation to Work

Source: American Community Survey 1 Year Estimates, San Mateo County, 2017, 2020, 2022

6.2.1 Transit Ridership

Figure 9 shows the average year-to-date ridership data from 2017 to 2023 which includes counts for SamTrans bus, paratransit, Caltrain, BART, Oyster Point Ferry, and commuter shuttles.

While both Caltrain and BART saw significant growth in ridership leading up to 2017, the pandemic was a turning point with ridership steadily declining between 2018 and 2021 for rail transit services due to changes in commute patterns with many people no longer commuting to the office as before, and some people adopting a hybrid schedule. While both agencies continue to struggle to return to pre-pandemic levels, Caltrain has seen weekend ridership buoyed recently by special services to San Francisco Giants games and other special events. In August 2023, BART was at 47% of pre-pandemic levels; in contrast, SamTrans bus service had returned to about 89% of pre-pandemic levels. The District implemented its Reimagine SamTrans network in 2024 to include more frequent weekday and weekend service on key routes and introducing new routes in response to community input.

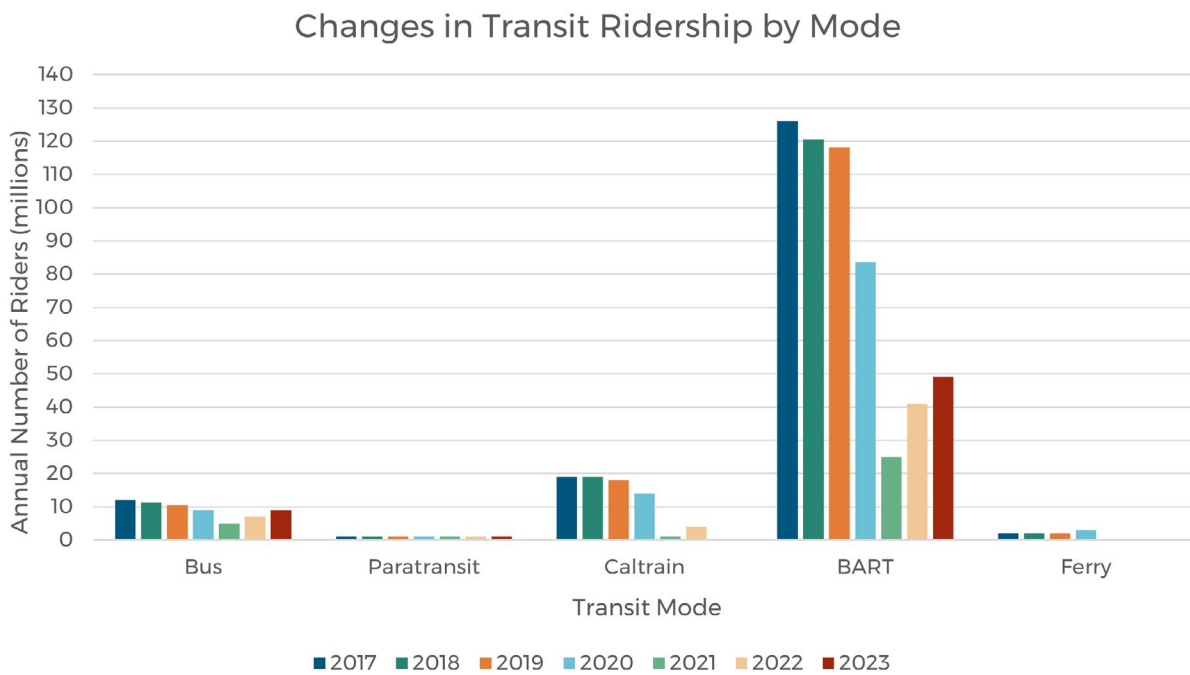


Figure 9: Changes in Transit Ridership by Mode

Source: SamTrans Ridership (Meeting Agenda Packets), Caltrain, BART, and the Water Emergency Transportation Authority (WETA)

6.2.2 Vehicle Miles Traveled

VMT is a metric of vehicle traffic that measures the number of miles traveled by automobiles over a given period and region. VMT is shown below for each incorporated city in San Mateo County, between 2017 and 2020 to indicate fluctuations in the County’s travel patterns.

Daily VMT totals are shown in San Mateo County by year, from 2017 to 2022, which is currently the most recent year of data availability from the California Highway Performance Monitoring System (**Appendix C-3**). Daily VMT in the county grew steadily from 2017 and peaked at 20,121.68 in 2019. From 2020 to 2022, Daily VMT remained below 16,000. A consistent decrease of nearly 25% in daily VMT signals that long-term pandemic outcomes have significantly altered the ways San Mateo County conducts daily vehicle trips.

Between 2020 and 2022, VMT has trended downward in local arterial streets throughout nearly every city, signaling a reduced volume of traffic-related emissions at local levels. As shown in Figure 10, State Highway VMT through San Mateo County observed an opposite trend, consisting of positive VMT change between 2021 and 2022. Highway VMT increases point to considerations of enhanced alternatives for long-haul, single-occupancy vehicle commuters who travel along multi-county corridors, and the identification of communities where additional VMT-reducing implementations could produce the greatest share of countywide benefits.

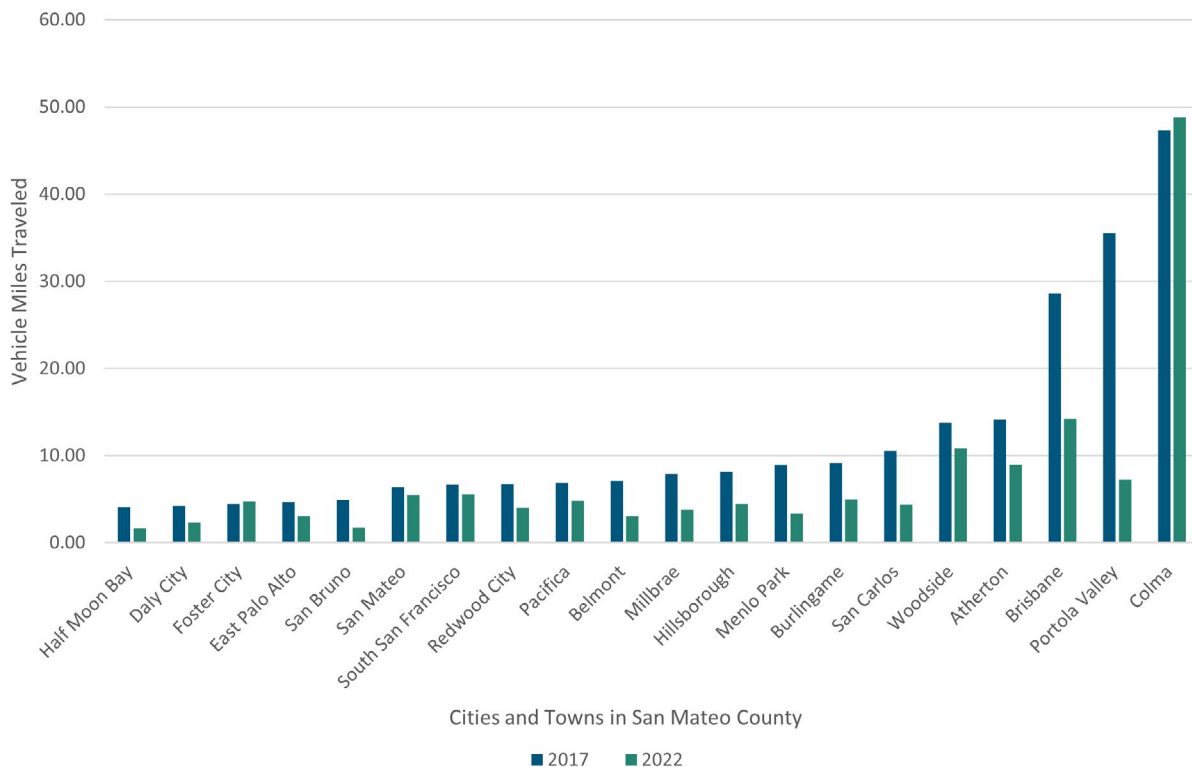


Figure 10: Per Capita VMT Trends by Urbanized Area

Source: California Highway Performance Monitoring System data, 2017-2022

6.2.3 Daily Trip Patterns

Analyzing daily trips by trip length is a critical step in assessing targeted actions for reducing countywide VMT. Trips under one mile in length represent an opportunity to reduce single-occupancy vehicle trips by promoting trips on foot. Furthermore, trips from one to three miles in length could be reduced by increasing bicycle trips, and three-to-five-mile private automobile trips could be reduced through transit ridership increases.

TRIPS WITHIN SAN MATEO COUNTY

Figure 11 below displays a daily average of trip lengths that originate and terminate in San Mateo County from the fall of 2022, using a sample size of 2.24 million trips taken by 705,000 trip-takers. From this sample, about one third of daily trips in the county for all purposes (e.g., work, school, grocery store, recreation, etc.) range from one to three miles in length. Fewer than 30% of trips from this sample are greater than five miles in length, yet about 50% of trips from the same sample are completed by drivers of single-occupancy vehicles (not counting private vehicle passengers, rideshare users, or commercial vehicle motorists, who account for an additional 25% of trips in this sample). Overall, current conditions show a high volume of county trips with potential for conversion from single occupancy vehicle trips to pedestrian (0-1 mile), bicycle (1-3 miles), or public transit (3-5 mile) trips.

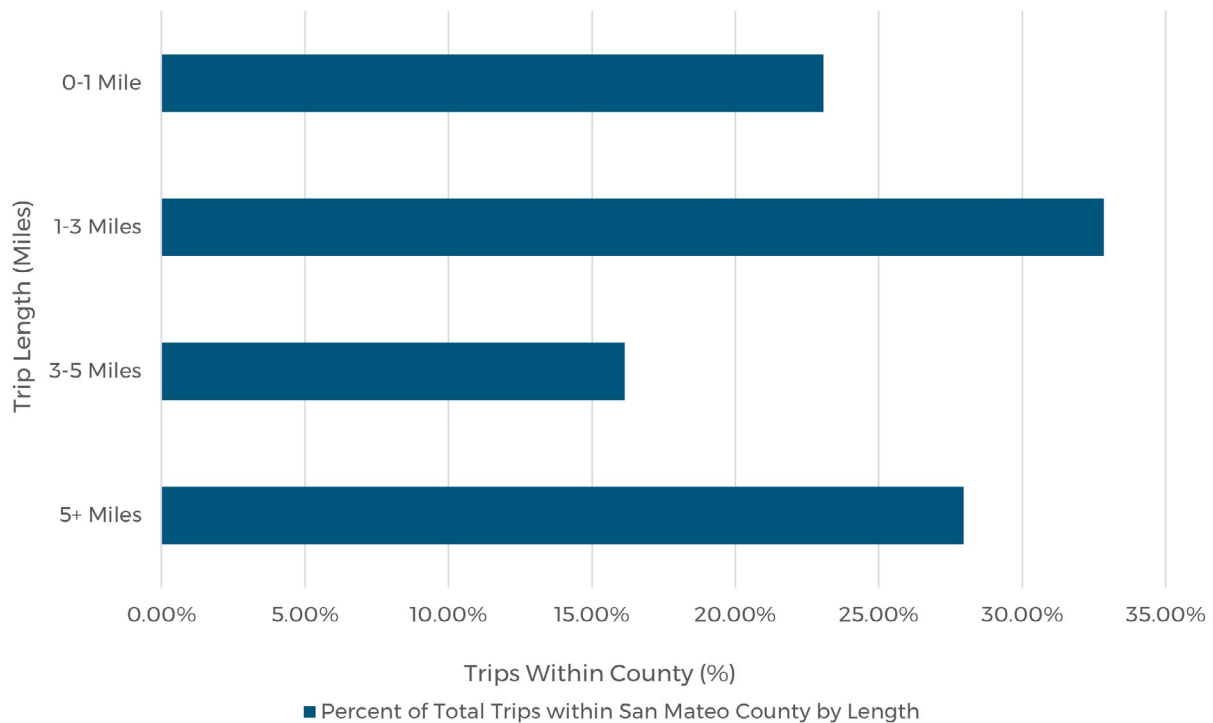


Figure 11: Percent of Total Daily Trips Within San Mateo County by Trip Length

Source: Replica, Fall 2022 Statistics for San Mateo County Trips.

The same sample in Figure 11 is applied to **Figure 12** below to display the percentage of daily trips within San Mateo County by the purpose of the trip. No trips that originate or terminate outside of San Mateo County are included in this sample, and each trip type listed below is defined by where the trip terminates. Recreational trips are defined by vehicle trips to restaurants, bars, or social events. Home trips are trips that terminate at the trip-taker’s residence. Recreational trips and shopping trips represent significant shares of trips made completely within the county, highlighting a key consideration for future mobility and accessibility improvements that surround major shopping, eating, and entertainment destinations as a form of traffic congestion relief.

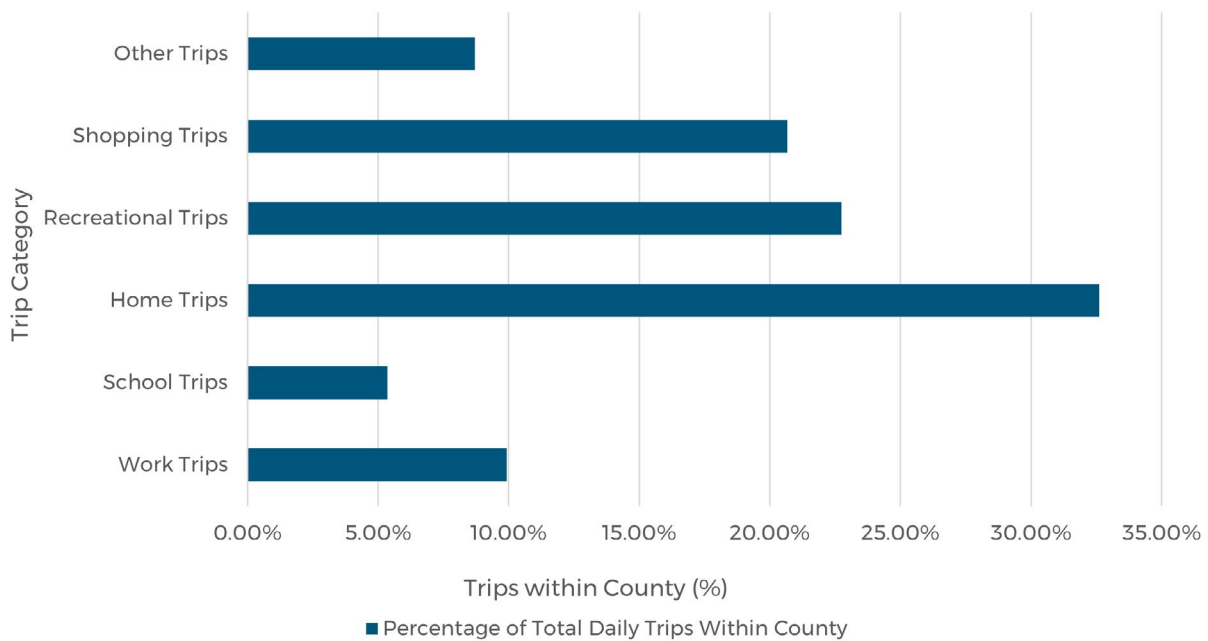


Figure 12: Daily Trip Destination by Trip Type Within San Mateo County

Source: Replica, 2022

TRIPS TO WORK IN SAN MATEO COUNTY FROM OUTSIDE THE COUNTY

The average number of daily work trips into San Mateo County was 129,744 (Appendix C-2).

Origins include:

- Santa Clara County, 44,798 trips (35%)
- San Francisco County 40,076 trips (31%)
- Alameda County 29,095 trips (22%)
- Contra Costa County 7,888 (6%)
- Other counties 7,887 (6%)

TRIPS THROUGH SAN MATEO COUNTY

The trips that travel through San Mateo County, but do not originate or terminate within the county's boundaries, come from a sample size of about 250,000 trips (**Appendix C-2**). The greatest share of trips through San Mateo County are traveling from San Francisco County to the north, Santa Clara County, to the southeast, and Alameda County, to the west. These counties are also regionally significant for San Mateo County through trip destinations. Continued investment in regional transit connections could help address many of these commute patterns.

6.2.4 Average Daily Traffic

Figure 13 and Figure 14 show average traffic volumes along San Mateo County freeways during peak times, midday off-peak times, and all-day weekend times that pass through six San Mateo County freeway interchange points in May 2019, compared to May 2023.

Each location was calculated by a road segment zone of analysis, which outputs a volume of traffic that travels through each segment during a specific time frame. Peak AM and PM times were calculated as an average of traffic volumes between Monday and Thursday, for the hours of 6:00 AM to 10:00 AM, and 3:00 PM to 7:00 PM, respectively. Weekday Mid-Day volumes were calculated for the period between 10:00 AM and 3:00 PM, Monday through Thursday. Weekend All-Day volumes were calculated for a 48-hour period comprising an average of Saturday and Sunday volumes.

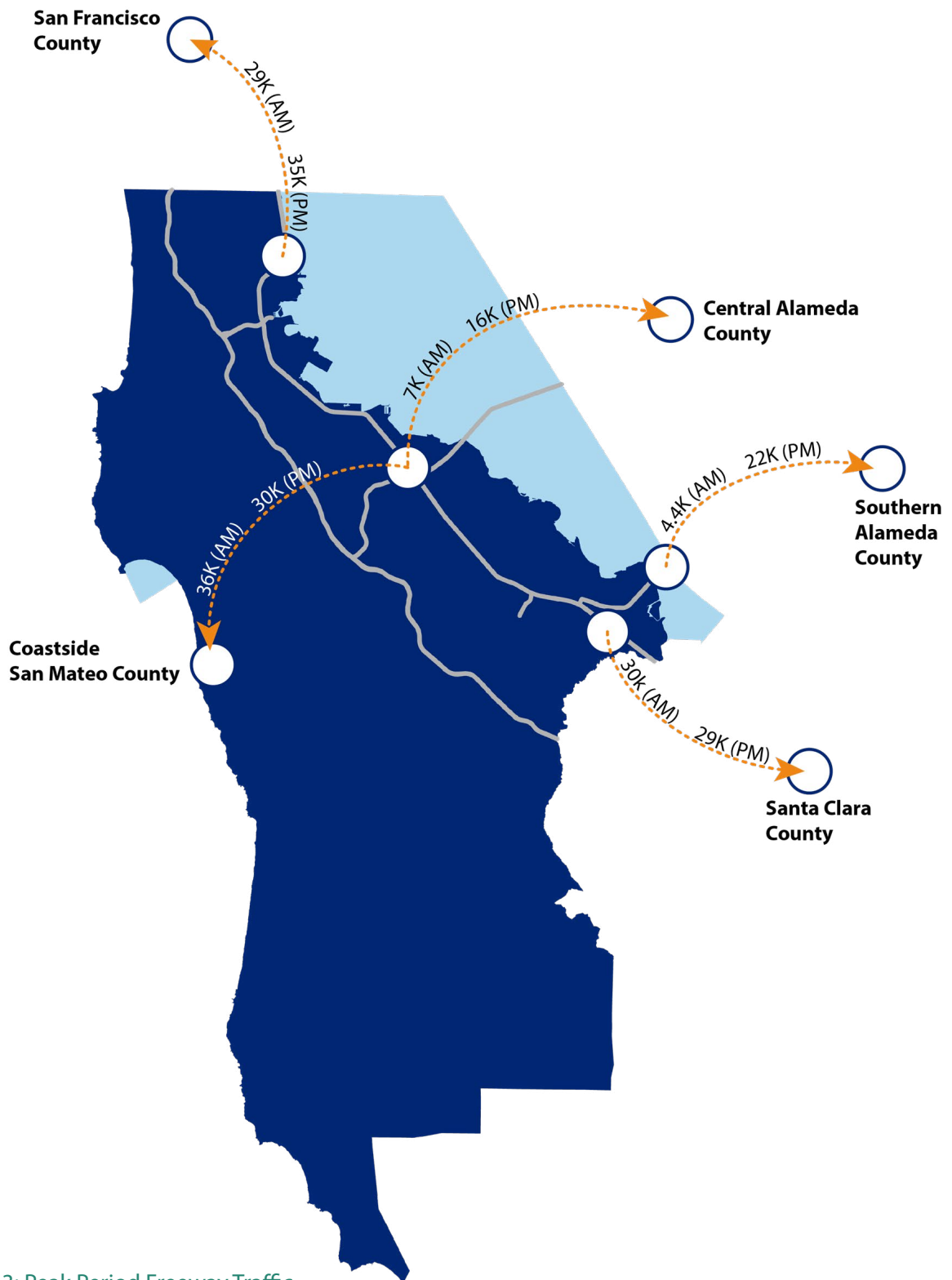


Figure 13: Peak Period Freeway Traffic Volumes in May 2019

Source: Streetlight Data, 2024

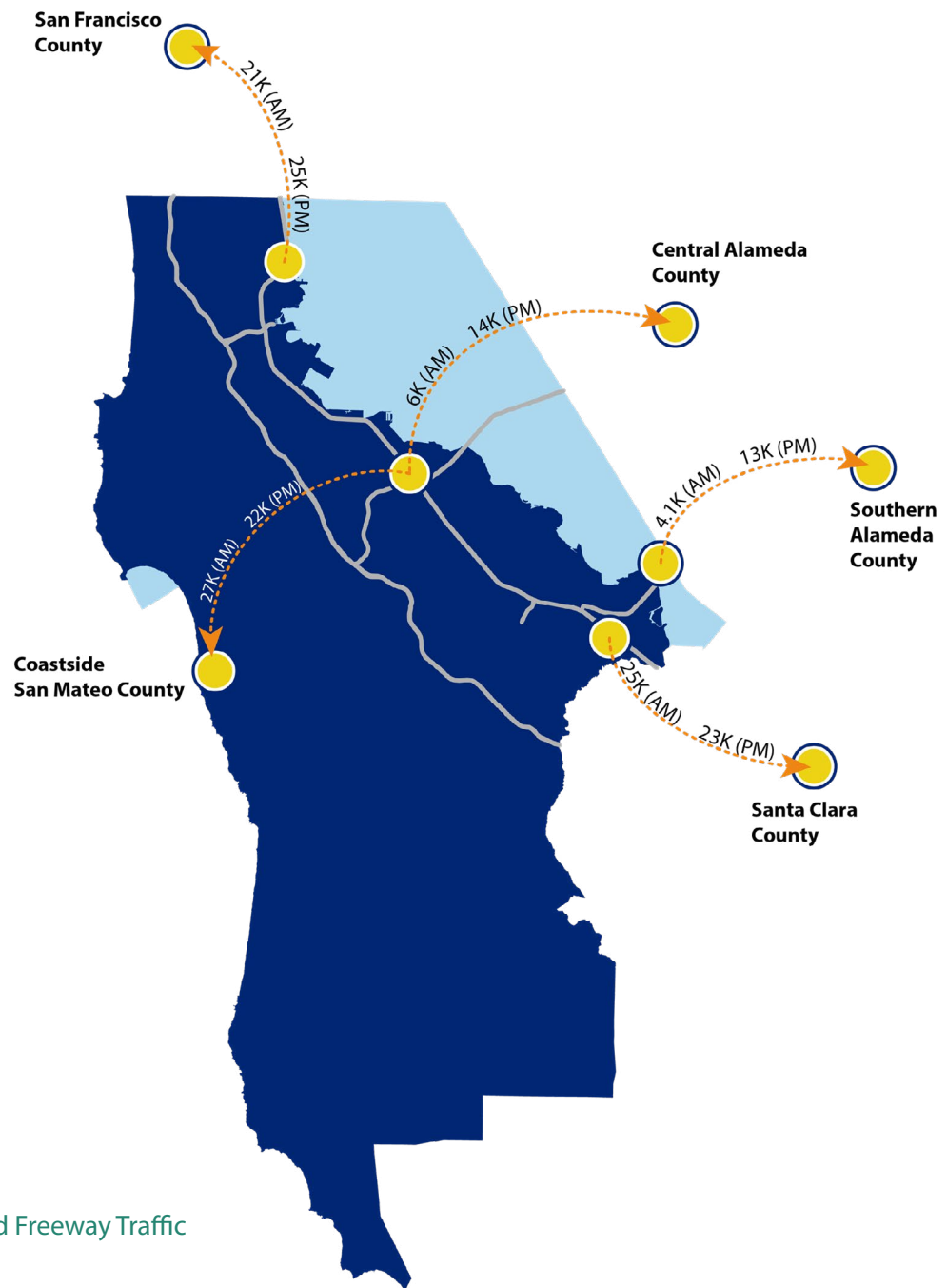


Figure 14: Peak Period Freeway Traffic Volumes in May 2023

Source: Streetlight Data, 2024

Between 2019 and 2023, there was a decrease in traffic volume along major San Mateo County corridors. The largest overall travel decreases occurred along US 101 near South San Francisco, both for northbound and southbound trips during the weekend (all day), weekday (all day), and rush hour times (weekday AM/PM peak). Further south along US 101, at the State Route 92 interchange, north and southbound traffic volumes have generally remained the same or increased slightly. The same is true along SR 92 near the San Mateo-Hayward Bridge.

6.3 NEW MOBILITY SERVICES AND AUTONOMOUS VEHICLES

In San Mateo County, several mobility projects and technological improvements to transportation are expected to take shape between 2025 and 2029. As of 2024, many of the projects that concern transit and freeway congestion relief are in pilot stages, with the intention of future implementation countywide.

6.3.1 Micromobility

Micromobility improvements consist of infrastructural enhancements catering to bicycles, scooters, small vehicles, and micro-transit services. Micromobility modes are usually offered by cities or third-party agents as on-demand vehicles that can be rented on a trip-by-trip basis. Typically, these services might include e-bike sharing programs or on-demand micro-shuttle services.

In December 2022, C/CAG released a San Mateo County Shared Micromobility Feasibility Study and Implementation Plan, with the purpose of defining what shared micromobility would mean for the county and determining if it is feasible to pursue. The plan conducted an analysis to determine how shared micromobility could address current transportation challenges and opportunities faced by the county, as well as how countywide resources and partnering agencies could be used to help develop the plan. The plan recommends establishing a multi-jurisdictional program with a single managing body responsible for procuring the shared micromobility infrastructure and equipment, while using one or more contracted third-party operators to maintain and finance the system rather than a public agency. Since 2022, several public-private partnerships between San Mateo County cities and independent micro-transportation contractors have begun as part of a larger process to integrate countywide micromobility for enhanced first mile/last mile connections.

BURLINGAME AND MILLBRAE SPIN BIKESHARE PROGRAM

In 2023, the Cities of Burlingame and Millbrae launched a joint bikeshare program with Spin. Spin is a San Francisco-based micromobility company that operates e-bikes and scooters in North American and European cities and college campuses. The program consists of e-bike “corrals” located near major transit stations, shopping centers, restaurants, parks, and libraries in both cities, where bikes can be rented via a smartphone app interface.

REDWOOD CITY BIRD SCOOTER SHARE PROGRAM

Bird, a global scooter share service, began a partnership with Redwood City in 2022 to offer a citywide shared micromobility program. The partnership was developed following RWCmoves, the Citywide transportation plan, which outlined goals for managing congestion, expanding connections, and making the city’s transportation network more sustainable. In the first five weeks of Bird’s scooter share service in Redwood City, over 7,400 trips occurred, traveling 11,980 total miles at an average of 1.6 miles per trip.



BAY WHEELS EXPANSION INTO SAN MATEO COUNTY

Owned by Lyft, in partnership with MTC and the Bay Area Air Quality Management District, Bay Wheels has expanded its bike sharing docking infrastructure and area of reach into Daly City as of May 2024. In prior years, the program expanded to San Jose and the East Bay, adding 24 new docking stations and 565 e-bikes in Oakland, Emeryville, and Berkeley to its inventory of over 6,000 bicycles at over 500 stations. Bay Wheels' expansion into Daly City represents a milestone for San Mateo County as it continues to implement regional connectivity programs that make county-to-county active transportation a more feasible drive-alone alternative.

In addition to a variety of bike, e-bike, scooter, and AV implementations planned for the Bay Area, various agencies like MTC plan programs, infrastructural expansions, and community outreach events to encourage a greater presence of micromobility enhancements in the region.

6.3.2 Mobility Hub Projects

In 2021, MTC awarded pilot funding to six regionally significant mobility hubs throughout the Bay Area in an effort to enhance connectivity between transportation modes and close regional gaps and disparities. Mobility hubs are locations that offer regional connectivity through transit and other shared transportation options, such as e-bike sharing and on-demand micro shuttles, enabling connections to a more diverse range of destinations that are best served by various modes of transportation. The six mobility hubs chosen for funding focused on providing seamless multi-modal connections through enhancements to wayfinding, mode-specific infrastructure, electric vehicle (EV) charging stations, and even bicycle repair facilities. Two of the selected Mobility Hub Pilot Projects are in San Mateo County, located at the Millbrae Transit Center and Burlingame Square.

The Millbrae Transit Center Mobility Hub is a conversion from a previously existing parking lot to a multimodal transit hub. The hub centralizes bike share facilities and EV charging stations to encourage connections to BART, Caltrain, downtown Millbrae, and an existing Class III bicycle facility located on El Camino Real. The Burlingame Square Transit Hub Pilot focuses on improvements to pedestrian and bicycle connectivity at a transit-adjacent plaza, with added seating areas, bicycle racks, additional lighting, and improved pedestrian wayfinding signage.

Lastly, the TA, in partnership with the City of San Mateo and the District, is developing the US 101/SR 92 Mobility Hub and Smart Corridor Plan. The plan will develop a 1.4 mile Class IV separated bikeway and convert the existing park and ride facility beneath the freeway into a mobility hub. The goals of the project are to expand transportation options, increase access to safe, high-quality transit, reduce emissions and enhance public health, and improve conditions for all non-motorized forms of transportation.

6.3.3 Transportation Network Companies

Transportation Network Companies (TNC) are on-demand transportation service providers that allow passengers to reserve a ride through a web or app-based interface. In recent years, TNCs like Uber and Lyft have gained a significant presence in most American cities, including in cities in San Mateo County. TNCs have carved out a place among other transportation services by offering mobility options, at times in competition with both single occupant vehicles and transit. Since their emergence, TNCs have quickly become a legitimate mode that transportation users consider when making transportation options. The quick rise of TNCs has also enabled them to mature quickly compared to other options within the new mobility class – in particular AVs, which have been on a slower growth trajectory, as is described further in the next section.

6.3.4 Autonomous Vehicles

An automated or autonomous vehicle uses sensors to make its own judgements while driving, unlike a connected vehicle, which is a vehicle that can share data with other vehicles and infrastructure, similar to most of the self-driving technology that exists today. The TA and C/CAG both accepted the San Mateo Countywide Automated Vehicles Strategic Plan in November 2024, which guides how the county could best adopt autonomous vehicles for use on its roads. The plan acknowledges that AVs have been rolled out in neighboring counties with varying levels of success, stating that San Mateo County will need to identify challenges in AV deployment all around the county to understand how the introduction of these vehicles can best prioritize the needs of residents.

From the current extent of community engagement that the county has conducted, four uses for the incoming vehicles were found to be most marketable for county constituents: personal use, ride-hailing, public transportation, and freight or goods movement. These use cases echo statewide principles, such as those established in the California Transportation Plan 2050, which guide future policy decisions for the introduction of AVs into the county. Plan Bay Area 2050 recognizes that AVs could fundamentally change transportation network design and operations as they currently exist in the county. In preparation for these changes, MTC and ABAG released an Autonomous Vehicles Perspective Paper, which recommends strategies that could support Plan Bay Area 2050's vision for AVs.

Waymo falls under the category of a ride-hailing service that would operate with AVs. As of May 2024, Waymo vehicles have been approved to begin service in several coastal communities in the county, north of the City of San Mateo. In May 2024, the autonomous service remains in testing phases throughout the county and use of vehicles engaging the driverless functions is limited to Waymo employees only. However, a California State Senate Bill has been in the works which would allow Bay Area communities to exhibit greater authority over the authorization, deployment, and use of AVs on their streets.

6.3.5 Electric Vehicles

Executive orders issued by former Governor Jerry Brown and Governor Newsom have set a goal for the installation of 250,000 EV charging stations by 2025, and five million EVs in use by 2030. The orders dictate that all new cars and passenger trucks sold in California must be zero-emission by the year 2035.

In effort to encourage these goals throughout the Bay Area and adhere to further goals set forth by the California Air Resources Board for 100% zero-emission transit fleets by 2040, the District has implemented a 100% zero emission bus goal that is slated for completion by 2034, six years ahead of schedule. This procurement would consist of 118 hydrogen fuel cell buses and 37 battery electric buses (subject to change). Caltrain has recently completed its efforts to replace its fleet with electric trains operating from San Francisco to San Jose, a modernization that will allow for greater frequencies, fewer service interruptions, and increased ridership onboard the service. While BART trains are already 100% electric, the agency has begun the process of installing EV charging stations



at Lafayette Station and Warm Springs Station as part of a pilot program. The intent of the pilot is to identify solutions to help the agency develop EV charging connectivity throughout the entire system, which will eventually deliver mobility benefits to San Mateo County neighborhoods served by BART. The previously mentioned Transit Mobility Hub Pilot Projects in Millbrae and Burlingame feature EV charging stations for private automobiles and e-bikes.

6.4 NEEDS ASSESSMENT

The previously summarized demographics and travel trends recommend the creation of a unified equity index to inform decision-making and future project prioritization, consideration of safety as a factor in future funding decisions, evaluation of previous TDM programs, consideration of the needs of the county's growing vulnerable populations (e.g., residents aged over 65), and inclusion of first/last-mile assessments as a factor in project selection and program evaluation.

6.4.1 Equity and Demographic Needs

IMPROVE UNDERSTANDING OF OLDER ADULT POPULATION MOBILITY NEEDS

Demographic trends for the county show that the population over 65 is the only age group that will increase in the county over time. Given this projected increase in potentially transit-dependent communities and communities with limited mobility, the TA should conduct specific community engagement with community members within this age range can help inform what transit and TDM investments to prioritize and provide an opportunity for the TA to better understand the needs of its fastest expanding population age group. In addition, an exploration into how well current transportation options meet senior population needs, identify any gaps, and develop areas for improvement or new services is recommended.

EVALUATE LESSONS LEARNED FROM EQUITY-FOCUSED PROGRAMS

Per Census data, the poverty rate in non-white communities in the county has increased over time, despite a decrease in unemployment rate and median wage increase. There has been a concerted effort to better integrate equity considerations within multiple levels of project development: from awarding funding to projects focused on or within equity priority areas to supporting projects that have specific equity program set-asides. In 2020, the San Mateo County Express Lanes JPA Board of Directors conducted an Equity Study to learn more about potential mobility improvements that the San Mateo 101 Express Lanes project could help address in equity communities. The study recommended an equity program designed to help with those needs. The study also recommended conducting an evaluation of this program as well as any other equity-focused TDM program in San Mateo County. As many of these equity focused initiatives have been implemented during the current strategic plan cycle, there is now an opportunity to review and assess how well the incorporation of equity has had of any impact within the communities projects are serving.

WORK WITH AGENCIES TO IMPLEMENT INITIATIVES THAT SUPPORT FIRST/LAST-MILE CONNECTIONS IN EQUITY PRIORITY AREAS

Federal, state, and local tools identify San Mateo County communities where rising poverty rates, high traffic congestion, and disproportionate impacts of pollution burden intersect. Expanding first/last-mile connections serves as an opportunity for the TA to work toward reducing traffic congestion and VMT in overburdened communities by replacing short drive-alone trips (50% of trips within San Mateo County being less than three miles in length) with active transportation. Enhancing first/last-mile connections in Equity Priority Areas will allow the TA to serve a larger ridership base while enabling additional opportunities for the TA to work with agencies to promote greater access to the county's major transit hubs.



6.4.2 Travel Trend Findings

ADVANCE MOBILITY HUB VISION AND TOOLKIT TO INFORM FUTURE PROJECTS

Mobility hubs provide opportunities to reduce VMT through enhanced first/last-mile connections and the offering of multimodal transportation options. Building on the work from the US 101/SR 92 Mobility Hub and Smart Corridor Plan and MTC's Mobility Hub Playbook, the TA can continue to explore how mobility hubs can increase access to transit as well as encourage new users to non-automobile travel. The opportunity lies around creating a corridor or countywide standard for the types and sizes of mobility hubs that would be successful in the county. This includes developing a mobility hub toolkit specific to San Mateo County, exploration of potential mobility hub locations, and any supplemental planning to ensure transit and non-automobile connections are considered.

PRIORITIZE IMPROVEMENTS ALONG OVERLAPPING HIGH TRAFFIC STRESS AND HIGH-INJURY CORRIDORS

Data gathered for the High Injury Network and High-Stress Network in C/CAG's CBPP show that corridors where humans perceive bicycling as having lower levels of comfort coincide with roadway characteristics of high-injury-density corridors. Identifying improvements to bicycle facilities to raise comfort levels is critical and requires targeted engagement with the bicycling community to understand the gaps and potential improvements. Future studies can include highlighting specific corridors from the High Injury Network to develop improvement plans and upgrade bicycle facilities with additional traffic-calming roadway measures. This approach will simultaneously improve safety and help current and potential new cyclists feel comfortable on roadways, therefore working to replace a greater number of drive-alone trips on San Mateo County arterials and highways with active transportation trips.

IMPLEMENT SERVICE-ENHANCING TRANSIT AMENITIES ALONG HIGHWAY ARTERIAL ROADS

Data in this Strategic Plan demonstrates that VMT reductions throughout San Mateo County are not occurring due to a greater modal split, but rather because of work and lifestyle changes at a collective level. Along highways, peak AM/PM traffic volumes remain high compared to pre-pandemic levels. Corridor-wide improvements to bus routes along arterials, parallel to heavily congested freeways, will help replace longer distance commuting trips and VMT with increased transit ridership. Preliminary work from the 101 Corridor Connect project is an example of the exploration into creating complementary non-automobile mobility options along a major corridor to help alleviate and encourage mode shift. This same exploration can be extended to other major corridors within the county, such as El Camino Real and Interstate 280. There is the recognition that these other major corridors in San Mateo County have unique functionalities and travel uses, so each study would be tailored to accommodate those characteristics.

7

Financial Outlook

The TA retains dedicated sales tax consultants who helped to provide updated sales tax projections for Measures A and W for the five-year Strategic Plan period of FY 2025 to FY 2029. The five-year total sales tax projection for Measure A is \$617.5 million and \$308.7 million for Measure W resulting in a total of \$926 million that can be made available for transportation projects in San Mateo County, as shown in Table 8.

Sales Tax Measure	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	Total
Measure A	\$117,988,326	\$120,285,501	\$123,292,638	\$126,374,955	\$129,534,328	\$617,475,748
Measure W	\$58,994,163	\$60,142,750	\$61,646,319	\$63,187,477	\$64,767,164	\$308,737,873
Total	\$176,982,489	\$180,428,251	\$184,938,957	\$189,562,432	\$194,301,492	\$926,213,621

Table 8: Sales Tax Projections for FY 2025 to FY 2029

Note: FY 2025-FY 2026 sales tax projections provided by the TA's sales tax consultant in mid-January 2024. Assumed annual growth of 2.5% for FY 2027 to FY 2029.

The TA's FY 2025 Adopted Budget identifies unprogrammed available budget amounts from 2024 and prior years for the Original Measure A (1988), New Measure A (2004), and Measure W (2018) Expenditure Allocations & Authorizations (**Appendix E**)

Table 9 and Table 10 take the total sales tax projections for Measures A and W, respectively, for the 2025-2029 five-year timeframe (shown in Table 10) and calculates the projected funding for each program category using the mandated percentage split of the sales tax revenues. The tables also add the unprogrammed amounts to the applicable categories of the sales tax projections for Measures A and W, respectively, and show the total of unprogrammed funds and sales tax projections for each category.

Program Categories	Mandated Percentage Split	FY 2024 and Prior Unprogrammed Funds	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	Subtotal (FY 2025 to FY 2029)	Total Unprogrammed Funds and Sales Tax Projections
Transit	30%	\$145,332,742	\$35,396,498	\$36,085,650	\$36,987,791	\$37,912,487	\$38,860,298	\$185,242,724	\$330,575,466
Caltrain	16%	\$55,229,945	\$18,878,132	\$19,245,680	\$19,726,822	\$20,219,993	\$20,725,492	\$98,796,120	\$154,026,065
Local Shuttles	4%	\$12,177,418	\$4,719,533	\$4,811,420	\$4,931,706	\$5,054,998	\$5,181,373	\$24,699,030	\$36,876,448
Paratransit	4%	\$0	\$4,719,533	\$4,811,420	\$4,931,706	\$5,054,998	\$5,181,373	\$24,699,030	\$24,699,030
Ferry	2%	\$14,165,256	\$2,359,767	\$2,405,710	\$2,465,853	\$2,527,499	\$2,590,687	\$12,349,515	\$26,514,771
Dumbarton Rail Corridor	2%	\$26,711,578	\$2,359,767	\$2,405,710	\$2,465,853	\$2,527,499	\$2,590,687	\$12,349,515	\$39,061,093
BART within San Mateo County	2%	\$0	\$2,359,767	\$2,405,710	\$2,465,853	\$2,527,499	\$2,590,687	\$12,349,515	\$12,349,515
Highways	27.5%	\$53,406,562	\$32,446,790	\$33,078,513	\$33,905,475	\$34,753,113	\$35,621,940	\$169,805,831	\$223,212,393
Local Streets & Transportation	22.5%	--	\$26,547,373	\$27,064,238	\$27,740,844	\$28,434,365	\$29,145,224	\$138,932,043	\$138,932,043
Grade Separations	15%	\$67,126,056	\$17,698,249	\$18,042,825	\$18,493,896	\$18,956,243	\$19,430,149	\$92,621,362	\$159,747,418
Pedestrian & Bicycle	3%	\$8,946,946	\$3,539,650	\$3,608,565	\$3,698,779	\$3,791,249	\$3,886,030	\$18,524,272	\$27,471,218
Alternative Congestion Relief	1%	\$4,305,841	\$1,179,883	\$1,202,855	\$1,232,926	\$1,263,750	\$1,295,343	\$6,174,757	\$10,480,598
Administration	1%	\$0	\$1,179,883	\$1,202,855	\$1,232,926	\$1,263,750	\$1,295,343	\$6,174,757	\$6,174,757
Total	100%	\$242,069,602	\$117,988,326	\$120,285,501	\$123,292,638	\$126,374,955	\$129,534,328	\$617,475,748	\$859,545,350

Table 9: Allocation of Measure A Sales Tax Projections to Mandated Program Categories and FY 2024 and Prior Unprogrammed Funds (in 2024 Dollars)

Program Categories	Mandated Percentage Split	FY 2024 and Prior Unprogrammed Funds	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	Subtotal (FY 2025 to FY 2029)	Total Unprogrammed Funds and Sales Tax Projections
Regional Transit Connections	10%	\$51,846,147	\$11,798,833	\$12,028,550	\$12,329,264	\$12,637,495	\$12,953,432	\$61,747,575	\$113,593,722
Countywide Highway Congestion	22.5%	\$74,893,095	\$26,547,373	\$27,064,238	\$27,740,844	\$28,434,364	\$29,145,223	\$138,932,043	\$213,825,138
Local Safety, Pothole & Congestion Relief	10%	--	\$11,798,833	\$12,028,550	\$12,329,264	\$12,637,495	\$12,953,432	\$61,747,575	\$61,747,575
Grade Separations	2.5%	\$13,076,537	\$2,949,708	\$3,007,138	\$3,082,316	\$3,159,373	\$3,238,358	\$15,436,894	\$28,513,431
Bicycle & Pedestrian	5%	\$13,601,468	\$5,899,416	\$6,014,275	\$6,164,632	\$6,318,747	\$6,476,716	\$30,873,787	\$44,475,255
Total	50%	\$153,417,247	\$58,994,163	\$60,142,750	\$61,646,319	\$63,187,477	\$64,767,164	\$308,737,873	\$462,155,120

Table 10: Allocation of Measure W Sales Tax Projections to Mandated Program Categories and FY 2024 and Prior Unprogrammed Funds (in 2024 Dollars)

7.1 FUNDING OUTLOOK AND NEEDS

Figure 15 shows the Measures A and W unprogrammed funds and sales tax projections funds against the funding needs for the competitive program categories.

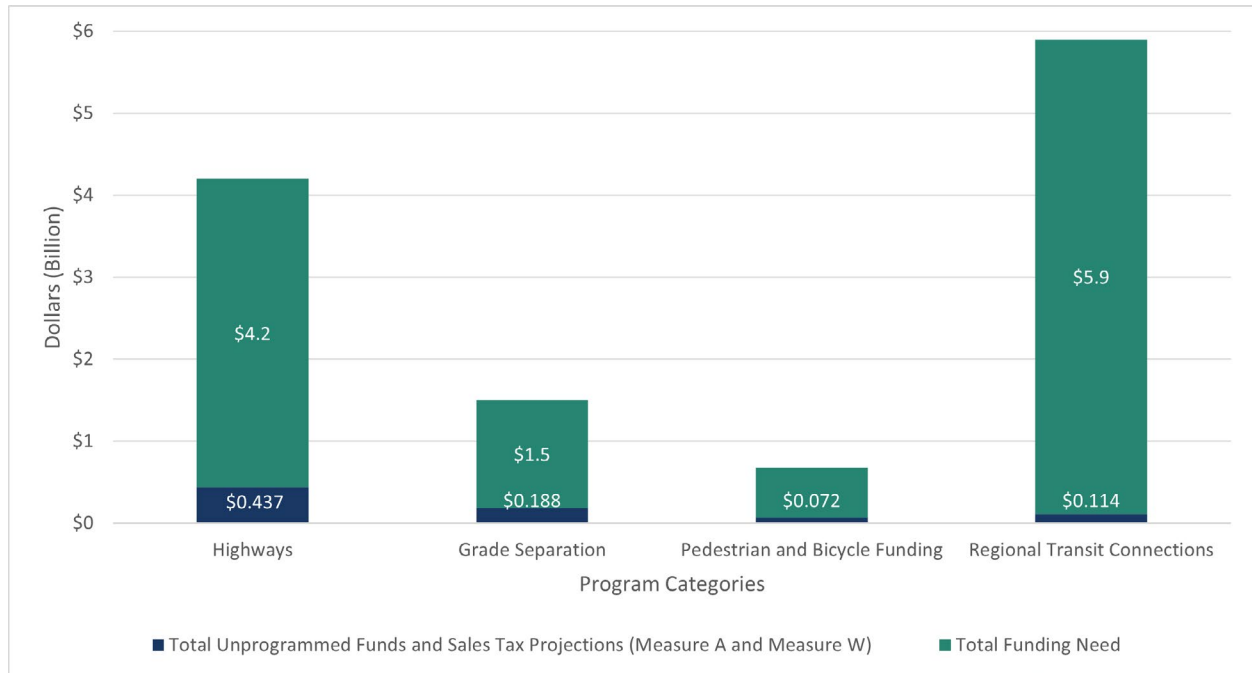


Figure 15: Measures A and W Unprogrammed Funds and Projected Sales Tax Funds and Total Funding Needs

7.1.1 Highway Funding Outlook

- The total combined unprogrammed funds and sales tax projections through FY2029 for Highway projects is \$437 million.
- The SHRP CIP includes 30 projects at various stages of development, with cumulative project costs totaling \$2.9 billion and the total cost of the “next feasible phase” for the 30 projects is \$181.6 million.
- Inflation and construction cost escalation increases the original total cost estimate of \$2.9 billion to \$4.2 billion. The figure only represents high-level adjustment factors, and more information on each project will be assessed as they progress through the development process.

The unprogrammed Measures A and W funds and sales tax projections for Highway projects of \$437 million can fund 10.5% of the \$4.2 billion Highway program.

7.1.2 Grade Separation Funding Outlook

The total combined unprogrammed funds and sales tax projections through FY 2029 for Grade Separation projects is \$188 million.

There are three Grade Separation Pipeline projects remaining as adopted by the TA Board of Directors, including:

- The Broadway Burlingame Grade Separation Project
- The South Linden Avenue & Scott Street Grade Separation Project
- Menlo Park's Ravenswood Avenue Grade Separation Project

The unprogrammed Measures A and W funds and sales tax projections for Grade Separation projects of \$188 million can fund 12.5% of the projected \$1.5 billion+ Grade Separation program.

7.1.3 Pedestrian and Bicycle Funding Outlook

- The total combined unprogrammed funds and sales tax projections through FY 2029 Pedestrian and Bicycle projects is \$72 million.
- The C/CAG Comprehensive Bicycle and Pedestrian Plan includes a summary of the cost estimates for the bicycle facilities recommended in this plan, which estimated the total need for all countywide bikeway backbone network and trail projects at \$426.7 million in 2020 dollars.
- Inflation and construction cost escalation in recent years increases the original total cost estimate of \$426.7 to a projected estimate of \$676.7 million. The figure only represents high-level adjustment factors, and more information on each project will be assessed as they progress through the development process.

The unprogrammed Measures A and W funds and sales tax projections for Pedestrian and Bicycle projects of \$72 million can fund 10.6% of the \$676.7 million Pedestrian and Bicycle program.

7.1.4 Regional Transit Connections Program Funding Outlook

- The total combined unprogrammed funds and sales tax projections for highway projects is \$114 million.

The unprogrammed Measure W funds and sales tax projections for RTC projects of \$114 million can fund 2% of the \$5.9 billion RTC program.

8

Programming, Allocation, and Monitoring Guidelines

8.1 PROJECT SELECTION CATEGORIES

The TA Strategic Plans have historically categorized Measures A and W funding programs and subcategories into three categories: Agreement-Based Programs, Plan-Based Programs, and Competitive Programs. This plan removes the Plan-Based Programs category since multiple plans were adopted in the prior Strategic Plan period, but the TA may elect to update those individual plans as conditions change in the future. Additional plans may be developed for individual funding programs periodically to guide updates and reflect best practices over time in the future and updates to the Strategic Plan also qualify as plan-based changes. The results of which are now either agreement-based, competitive-based, or a combination of the two for the Strategic Plan 2025-2029.

The programs included in the Agreement-Based category are governed by agreements that are either specified in the Measure A Expenditure Plan or the Measure W Congestion Relief Plan. The programs included in the Competitive Program category are governed by a CFP cycle or on a first-served, ready-to-go basis. These program designations are shown in Table 11.

Agreement-Based		
Measure A	Measure W	
Local Streets & Transportation	Local Safety, Pothole & Congestion Relief (Local Investment Share)	
BART	N/A	
Caltrain		
Dumbarton Rail Corridor		
Ferry		
Competitive		
Measure A	Measure W	Project Selection Approach
Highways	Countywide Highway Congestion Improvements	Call for Projects process guided by the Short-Range Highway Plan (SRHP) and Highway Capital Improvement Program (CIP)
Alternative Congestion Relief (ACR)	Transportation Demand Management (TDM) ¹	Call for Projects process guided by the ACR/TDM Plan
Pedestrian & Bicycle	Bicycle & Pedestrian	Call for Projects process
Local Shuttle ²	N/A	Call for Projects process guided by the Peninsula Shuttle Study
N/A	Regional Transit Connections	Call for Projects process guided by the Short-Range Transit Plan (SRTP) and Transit CIP
Grade Separations	Local Safety Pothole & Congestion Relief Improvements (Grade Separations)	Fund pipeline projects on a rolling basis

Table 11: Project Selection Approach

Notes:

1 The Measure W TDM program is a subcategory of the Measure W Countywide Highway Congestion Improvements program.

2 The Measure A Local Shuttle program is a subcategory of the Measure A Transit program

8.2 STANDARD GUIDELINE ELEMENTS

The following sections describe standard guidelines and policies that are generally applicable to all TA funding programs. However, individual programs in the Competitive Program category may specify additional guidelines and requirements as part of each subsequent CFP that also must be adhered to.

8.2.1 Eligible Sponsors

The designated participants in the Measures A and W programs are the project initiator, the Sponsors, the project manager/operator, and the TA. Table 12 defines the eligibility requirements, roles, and responsibilities of each of these participants.

Participant	Eligibility	Roles and Responsibilities
Project Initiator	Any person or entity	Develops scope for the initial project
Sponsor	<u>Measure A</u> : identified in Expenditure Plan for each program category <u>Measure W</u> : as determined through the Strategic Plan development process	<ul style="list-style-type: none"> • Submit funding request or CFP applications to the TA • Develop funding plan • Coordinate with the TA to identify appropriate implementing agency • Submit monitoring reports • Sign primary grant agreement and project supplement(s)
Implementing Agency	The agency who is responsible for leading funding award on behalf of an eligible Sponsor. The TA may act as an implementing agency, if requested.	<ul style="list-style-type: none"> • Plan/engineer/construct projects • Operate services • Sign primary grant agreement and project supplement(s) when applicable
Transportation Authority	Identified in the Measure A Expenditure Plan and the Measure W Congestion Relief Plan as the manager/ administrator of the Measures A and W programs	<ul style="list-style-type: none"> • Evaluate and prioritize projects • Coordinate with Sponsor to determine implementation lead • Program and allocate funds • Oversight of projects / programs • Sign primary grant agreement and project supplement(s)

Table 12: Measures A and W Participants and Responsibilities

8.2.2 TA Board of Directors Approval

The TA Board of Directors makes fund programming decisions based on recommendations developed during CFP processes. These decisions reserve funds for specific projects or a program of projects. Either concurrent with the programming or in a separate action, the Board of Directors will allocate funding and track allocated funds as part of the TA's annual budget approval process. This series of actions ensures timely availability of funds.

8.2.3 Primary Grant Agreement and Project Supplement(s)

Historically, the TA has executed separate funding agreements and memoranda of understanding, or amendments thereto, for each phase of each project. To streamline and expedite future contracting processes, the TA has developed a new primary grant agreement through which the TA and Sponsors will document the structure of their relationships and related obligations. Concise individual project supplements will detail each funded project and any specifically-associated requirements during the 10-year term of the primary grant agreement.

To be eligible for TA Measures A and W funding over the next 10 years, the TA will require Sponsors' governing boards to adopt resolutions authorizing the Sponsors' chief executive/mayor/chair, or designee, to sign a primary grant agreement with the TA.

8.2.4 Matching Funds

The TA requires that Sponsors provide matching funds for all individual funding requests. The matching funds can either be supplied from the options below:

- Local general funds
- Local investment funds from Measure A Local Streets/Transportation and Measure W Local Safety, Pothole, and Congestion Relief Improvements that are discretionary transportation funds provided for each local jurisdiction
- External local, county, regional, state, and federal grants or other funding sources

Navigating through the network of external funding and securing matching funds may be complicated for Sponsors. To aid local jurisdictions in obtaining funds as needed to meet the minimum matching funds requirement, the TA has provided a representative summary of existing federal, state, and local funding programs that can be leveraged with Measures A and W funding contained in **Appendix G**, although these programs are subject to change. As resources permit, the TA will work with Sponsors to maximize the amount of matching funds secured for each project, which is discussed further in **Section 11**.

8.2.5 Timely Use of Funds

As part of TA funding agreements, Sponsors have been required to comply with timely-use-of-funds requirements pertaining to project initiation timelines and invoicing for the Highways, ACR/TDM, Bicycle & Pedestrian, and RTC competitive funding programs. The Strategic Plan 2025-2029 extends these requirements to all TA funding programs with additional guidelines for defining what constitutes project initiation. Projects that fail to meet the outlined requirements will be at risk of being deprogrammed and the awarded funds may be reprogrammed to other projects. Project deprogramming will be implemented using the following tiered monitoring system.

PROJECT INITIATION REQUIREMENTS

- For project awards identified as “fully funded” as the result of a TA allocation, the project must be initiated within 12 months of the funding award. At a minimum, this includes the execution of a funding agreement or project supplement, along with the submittal of the first request for reimbursement of a Sponsor’s own staff’s work, release of a Request for Proposal for pre-construction work (PLAN or PID, PA/ED or PE/EV, and PS&E phases), or release of a construction bid opportunity.
- If a Sponsor does not initiate work within 12 months of the funding award as indicated in required Quarterly Status Reports, the TA will require a meeting with the Sponsor’s chief executive and project staff to review reasons for the delay. The TA Executive Director or Executive Officer may approve one six-month extension, at their discretion, if a reasonable strategy and commitment by the Sponsor are agreed to. Projects granted this extension must be able to initiate the project within 18 months of the funding award. The TA may de-program a project if these requirements are not met and may provide additional exceptions on a case-by-case basis for extenuating circumstances.
- For projects awards that have requested to use Measure A and/or Measure W funding as leverage for other external grant opportunities, the TA will monitor a timeline for the applicable project phase to be fully funded: Projects costing under \$5 million must be fully funded within two years, and projects costing over \$5 million must be fully funded within five years. Once a project becomes fully funded, the project initiation requirements detailed above will apply.

INVOICING REQUIREMENTS

- Sponsors will be required to invoice at minimum once a quarter from project initiation.
- The TA will update the Quarterly Status Reports format to include a spotlight to monitor and report on invoicing compliance
- If a project does not bill two quarters in a row, a project will be deemed inactive, and the TA will require a meeting with the Sponsor’s chief executive and project staff to review project progress. If a project does not bill for one year, then the TA Executive Director or Executive Officer may consider recommending the Board of Directors de-program the project.

ATTRIBUTION REQUIREMENTS

- Sponsors must include attribution that indicates work was funded with “Measure A Funds” or “Measure W Funds” or “Measures A/W Funds from the TA.” This provision applies to any project, or publication, that is funded in part or in whole by “Measure A Funds” or “Measure W Funds” or “Measures A/W Funds.” Acceptable forms of attribution include TA branding on Project-related documents, construction signs, public information materials, and any other applicable documents. Sponsor must comply with the TA’s External Attribution Guide, which may be updated from time to time and will be available on the TA’s website.

8.2.6 Monitoring and Reporting Requirements

GENERAL REQUIREMENTS

All TA-funded projects are subject to monitoring and reporting requirements. Historically, monitoring and reporting requirements varied for each individual funding program. The Strategic Plan 2025-2029 merges the disparate requirements into a single requirement of formal reporting to the Quarterly Status Reports (QSRs). The TA may require additional monitoring requirements for Sponsors on a case-by-case basis. These requirements will also be included in the forthcoming

Principal Agreements that each eligible Sponsor must adopt to receive funding from the TA.

- Capital projects
 - Sponsors will be required to submit formal reports to be included in the TA Quarterly Status Reports (QSRs) during the planning, design development, and construction of capital projects. The content of the QSRs will be focused on project scope, schedule, budget, cash flow, and identification of potential project risks. A final report documenting the final project scope, schedule, and budget along with photo evidence will be required.
- Operational projects
 - Sponsors will be required to submit QSRs with content focused on project performance for operating projects. Sample performance measures include ridership, service effectiveness (cost per passenger), service quality, and customer satisfaction. If performance measures indicate less than acceptable performance, the TA will work with the Sponsor to set up a mitigation program and achieve improvements as a condition of continued funding from the TA.

MAJOR PROJECTS ADVANCEMENT POLICY

For projects with projected total costs over \$25 million, Sponsors must present a presentation to the TA Board upon completion of the Preliminary Engineering and Environmental Clearance (PE/EV or PA/ED) phase of work prior to requesting funding for Final Design, Right-of-way, and Construction phases of work. The Sponsors must present information on project needs, benefits, impacts, and costs/funding plan to the TA Board of Directors and Community Advisory Committee. This can be done as part of the Draft Recommendations for a Calls for Projects cycle or as a standalone presentation.

The intent of the Major Projects Advancement Policy is to better inform the TA Board of Directors and Community Advisory Committee about potential trade-offs and impacts of projects earlier on in the development process once these considerations are known upon the completion of environmental review. This policy also applies to projects exempt from environmental review but with projected costs over \$25 million. Required analysis and impact assessment should be discussed with TA Executive and Director-level staff during preliminary engineering scoping.

As a Key Action for the Strategic Plan 2025-2029, the TA will also be developing Program Management Guidelines with updates to the oversight process for projects over \$25 million.

CREDIBLE FUNDING PLAN

A Credible Funding Plan requirement applies to all projects subject to the Major Advancement Policy. The Credible Funding Plans should clearly lay out the TA's maximum contribution and how a Sponsor will use other local funds or external grant sources to fully fund the project. The Sponsors should acknowledge their responsibility for securing the remaining funding or request assistance from the TA. TA staff will create a standard template and review Credible Funding Plans to assess the assumptions for potential external grant awards.

The following level of effort is required based on the phase of work being request for funding in a CFP cycle:

- **Planning (PLAN):** For planning requests only that phase of work needs to be identified for funding.
- **Project Initiation Document (PID), Pre-Environmental/Environmental (PE/EV), or Project Approval and Environmental Document (PA/ED):** Following the development of a

planning study, a planning level cost estimate will be required for the total project cost and a full funding plan with estimated costs for all future phases of work is required to be signed by the Public Works Director (or similar position). Additionally, a description of how the project aligns with the California State Transportation Agency's (CalSTA) Climate Action Plan for Transportation Infrastructure goals by describing how a project is working to meet the metrics identified in the California Department of Transportation (Caltrans) Systemwide Investment Strategy (CSIS). This will be critical to understanding how the project may be able to leverage external state funding.

- **Final Design (PS&E), Right-of-Way (ROW), or Construction (CON):** Following the completion of preliminary engineering and environmental review phase, a revised preliminary engineering cost estimate will need to be prepared. The full funding plan with updated costs for all future phases of work is required to be signed by the Public Works Director (or similar position) for projects under \$25 million and by the City Manager (or other similar executive position) for projects over \$25 million in total cost.

8.3 TA ROLES AND RESPONSIBILITIES

8.3.1 Funding Agency

The primary role of the TA is to act as the funding agency to administer the Measures A and W transportation sales tax revenues. As part of this role, the TA actively assists Sponsors with leveraging funds and securing external grant awards, especially for major projects over \$25 million.

8.3.2 Sponsor

In 2016 and 2019, the TA Board of Directors authorized the agency to become an eligible Sponsor for the Measure A Key Congested Areas and Supplemental Roadways categories through minor Transportation Expenditure Plan amendments because the TA was not listed as an eligible Sponsor in the Measure A TEP (Reso 2016-12 and 2019-25). Subsequently in the 2021 Short-Range Highway Plan, the TA limited itself to sponsoring highway projects of countywide significance.

The Measure W Congestion Relief Plan does not specify eligible Sponsors for individual funding programs and permits eligible Sponsors to be further clarified in guidelines for each required Strategic Plan. However, consistent with the TA Board's direction in the Short-Range Highway Plan (adopted June 2021), the TA should continue to be eligible for projects of countywide significance in the Measure W Countywide Highway Congestion Improvements category.

8.3.3 Technical Assistance

The TA will take on an expanded technical assistance role to aid current and potential Sponsors in project delivery in various TA funding programs through several technical offerings, as described in the Technical Assistance Program in [Section 11](#).

8.4 ADDITIONAL CONSIDERATIONS

8.4.1 Special Circumstance Requests

There will be special circumstances when Sponsors need to request Measures A and W funding outside the established funding processes discussed in [Section 5](#). The TA Board of Directors may make funding available outside established CFP cycles upon request based on the following criteria:

- Urgency
 - A project that calls for immediate construction to address a public safety need
 - A project that can realize significant cost savings if it can be constructed in an earlier timeframe
 - Loss of funding sources if the project is not constructed within a certain timeframe
 - Expected escalation of project development and construction costs outpaces the rate of growth of Measures A and W revenues
- Impact to the Measures A and W programs
 - Potential of the funding advance delaying other projects
 - Financial fees associated with advancing funds (the potential saving in implementation costs should be considered)

The TA will determine the method of delivering the advance at the time the request is granted by the TA Board of Directors. The TA should also develop CIPs to determine if advancing funds by either borrowing from other programs or using financing would be an economically and fiscally prudent means of delivering high-priority projects at a lower cost (adjusted for inflation) compared to waiting and implementing projects strictly using a pay-as-you-go approach.

8.4.2 Financing and Bonding Backed by Sales Tax Revenue

Both Measures A and W allow the TA to bond against their future tax revenues for the purpose of advancing the commencement of or expediting the delivery of transportation programs and projects. The bonding capacity is limited by future anticipated Measure A or Measure W revenues. The TA will weigh the benefits of bonding to facilitate timely implementation of programs and projects and avoidance of escalating construction costs against the costs of issuing debt. In recent years, interest rates have been relatively low, and the bonding agencies have been particularly receptive to issuing bonds supported by sales tax revenues. However, it will remain important for the TA to weigh the costs of a bond issue and the interest payments that will be required against the costs of deferring or delaying projects until the natural flow of funds is sufficient to move forward.

9

Agreement- Based Programs Administration

These programs and projects are not subject to a competitive project selection process governed by the TA and include the following program categories or subcategories:

- Local Streets and Transportation
- Paratransit
- BART
- Caltrain
- Dumbarton Rail Corridor
- Ferry

9.1 LOCAL STREETS & TRANSPORTATION PROGRAM

The Local Streets & Transportation Program consists of the Measure A Local Streets and Transportation program category and the Measure W Local Safety, Pothole & Congestion Relief Improvements (Local Investment Share) program category. These funds are generally intended to provide direct support to local jurisdictions for repaving, maintenance, and other local transportation improvements.



9.1.1 Measure A Local Streets and Transportation

The Measure A Transportation Expenditure Plan states:

Annually, 22.5% of the tax revenue will be allocated to Cities and the County to fund the improvement or maintenance of local transportation, including streets and roads. The County and Cities may use funding to: maintain or improve local streets and roads by paving streets and sidewalks and repairing potholes; promote or operate alternative modes of transportation, which may include funding shuttles or sponsoring carpools, bicycling and pedestrian programs, and develop and implement traffic operations and safety projects including signal coordination, bike/pedestrian safety projects, eliminating hazardous conditions or acquiring right-of-way.

The annual distribution shall be based 50% on population and 50% on road miles, which will be adjusted annually.

9.1.2 Measure W Local Safety, Pothole & Congestion Relief Improvements (Local Investment Share)

The Measure W Congestion Relief Plan states:

A total of twelve and one-half percent (12.5%) of Tax Proceeds will be invested in major arterial and local roadway improvements in key congested areas throughout the County. These investments will be focused on improving safety, reducing congestion, and supporting all modes of travel on the County's roadway system. Eligible investments include, but are not limited to, the following: implement advanced technologies and communications on the roadway system; improve local streets and roads by paving streets and repairing potholes; promote alternative modes of transportation, which may include funding

shuttles or sponsoring carpools, bicycling and pedestrian programs; plan and implement traffic operations and safety projects, including signal coordination, bicycle/pedestrian safety projects, and separation of roadways crossing the Caltrain rail corridor.

Each year, ten percent (10%) of the annual Tax Proceeds (out of the 12.5% total Tax Proceeds designated for this Category) will be allocated to each of the Cities and the County on a formula basis to be used for any of the purposes designated in the paragraph above. The annual distributions will be based 50 percent (50%) on population and 50 percent (50%) on road miles, and will be adjusted annually. Each of the Cities and the County will be required to demonstrate that Tax Proceeds would be used to enhance and not replace its current investments for transportation projects and programs. If a City or the County has a Pavement Condition Index score (a "PCI Score") of less than 70, it must use Tax Proceeds under this Category exclusively for projects that will increase their PCI score until such time as they reach a PCI of 70 or greater. Each of the Cities and the County will be required to transmit an annual report on projects funded, including how the funded projects reflect the Core Principles, subject to guidance established by the District and/or the Authority. Use of Tax Proceeds by Cities and the County under this Category shall be subject to audits.

9.1.3 Program Specific Guidelines

The program specific guidelines and requirements for this funding program are detailed in Table 13.

Program Guideline Category	Guideline Requirement
Eligible Sponsors	Cities and County
Eligible Projects	Paving, maintenance and repair, traffic lights and signage, operations, safety projects, and/or other transportation projects or programs
Matching Funds	N/A
Timely Use of Funds: Expenditure Timeline	Funds may be spent at the Sponsor's discretion.
Additional Monitoring and Reporting Submittals	Annual reports must be submitted to SMCTA on how the funding was expended. SMCTA audits the reports to ensure funding is only used for transportation-related purposes.

Table 13: Local Streets & Transportation Program Guidelines



9.2 PARATRANSIT

The Paratransit Program is a subcategory of the Measure A Transit Program and includes no comparable Measure W program category. Paratransit is for persons with disabilities who cannot independently use SamTrans bus service some of the time or all the time. The San Mateo County Transit District provides paratransit using Redi-Wheels on the bayside of the county and RediCoast on the coastside.

9.2.1 Measure A Transit Accessible Services

The Measure A Transportation Expenditure Plan states:

Annually, 4% of the tax revenue will be allocated to support the operating and capital needs of providing paratransit or other accessible services to eligible seniors and people with disabilities.

9.2.2 Program Subcategory Specific Guidelines

The program specific guidelines and requirements for the Accessible Services program subcategory are detailed in Table 14.

Program Guideline Category	Guideline Requirement
Eligible Sponsors	The District
Eligible Projects	Operating
Matching Funds	N/A
Timely Use of Funds: Expenditure Timeline	Funds may be spent at the Sponsor's discretion.
Additional Monitoring and Reporting Submittals	N/A

Table 14: Transit Accessible Services Program Subcategory Guidelines

9.3 BART

The BART Program is a subcategory of the Measure A Transit Program and includes no comparable Measure W program category. The BART Program comprises 2% of Measure A funds.

9.3.1 Measure A Transit BART

The Measure A Transportation Expenditure Plan states:

Provide financial assistance as SamTrans’ local match for capital investments and operating expenditures associated with the existing San Mateo County/SFO BART Extension.



9.3.2 Program Subcategory Specific Guidelines

The program specific guidelines and requirements for the BART program subcategory are detailed in the Table 15.

Program Guideline Category	Guideline Requirement
Eligible Sponsors	BART
Eligible Projects	Capital and Operating
Matching Funds	N/A
Timely Use of Funds: Expenditure Timeline	Funds may be spent at the Sponsor’s discretion.
Additional Monitoring and Reporting Submittals	N/A

Table 15: Transit BART Program Subcategory Guidelines



9.4 CALTRAIN

The Caltrain Program is a subcategory of the Measure A Transit Program and includes no comparable Measure W program category. The Caltrain Program comprises 16% of Measure A funds.

9.4.1 Measure A Transit Caltrain

The Measure A Transportation Expenditure Plan states:

Continue the current program to rebuild and upgrade Caltrain. Funding would be provided for San Mateo County's share of the capital cost of system wide improvements, including conversion of the line from diesel to electric operation. Funding would also be provided for existing stations upgrades, including expanded parking. Up to one-half of the available funding may be utilized to support operating costs.

9.4.2 Program Subcategory Specific Guidelines

The program specific guidelines and requirements for the Caltrain program subcategory are detailed in Table 16.

Program Guideline Category	Guideline Requirement
Eligible Sponsors	Caltrain/JPB
Eligible Projects	Capital and Operating
Matching Funds	N/A
Timely Use of Funds: Expenditure Timeline	<p>Primary grant agreement and project supplement(s) Execution (all subcategories): Fund recipients must complete a primary grant agreement and project supplement(s) and begin work within one year of allocation unless the TA approves the use of requested funding as leverage for other external grant programs.</p> <p>Operations Subcategory Awards: Operations funding must be spent within four years of executing a primary grant agreement and project supplement(s).</p> <p>Capital Subcategory Awards: For Planning, PE/EV, and PS&E phases: All work on capital projects must be completed within three years of effective date of the executed primary grant agreement and project supplement(s) date if funds are awarded for only one phase of work. If the TA awards funds for more than one</p>

Program Guideline Category	Guideline Requirement
Timely Use of Funds: Expenditure Timeline	<p>phase, it may allow work to be completed within up to five years from primary grant agreement and project supplement(s) execution.</p> <p>For awards that fully fund (“last dollar in”) ROW and CON phases: For ROW only, work on the funded phase must be completed within three years from primary grant agreement and project supplement(s) execution. For funds awarded to ROW and CON phases together, or funds awarded for only CON, the funded work must be completed within five years of execution of the primary grant agreement and project supplement(s).</p> <p>For ROW and CON awards that do not fully fund a phase (“TA funds used as leverage”): a Sponsor has up to five years to secure full funding for the applicable phase(s) and to execute a primary grant agreement and project supplement(s). The same ROW and CON timely use of funds requirements from the previous section applies once the primary grant agreement and project supplement(s) is executed.</p>
Additional Monitoring and Reporting Submittals	<p>Quarterly reporting is required for all projects funded by the annual capital contribution allocations and for special project allocations.</p>

Table 16: Transit Caltrain Program Subcategory Guidelines

9.4.3 Additional Requirements or Policies

- Operating and capital contributions must be made in accordance with the formulas agreed to by the three JPB member agencies for systemwide contributions.
- The Caltrain CIP developed a definition that was agreed upon by all three member agencies for systemwide and local county-specific projects.
- Special project allocations will establish individual timely-use-of-funds requirements and agreement expiration dates.
- The JPB may request the TA Board of Directors to program and allocate funding using any available unprogrammed funds after the operating and capital contributions for local San Mateo County capital projects.
- Each fiscal year, the TA may allocate up to 50% of funds collected and not previously allocated to be used for the San Mateo County operating contributions to Caltrain. Up to 50% of future projected sales tax revenue may be used for operating contributions and multi-year operating contribution agreements.

9.5 DUMBARTON RAIL CORRIDOR

The Dumbarton Rail Corridor Program comprises 2% of Measure A funds.

9.5.1 Measure A Transit Dumbarton Rail Corridor

The Measure A Transportation Expenditure Plan states:

Funding provided for station facilities and rail corridor improvements in the communities of Redwood City, Menlo Park and East Palo Alto in conjunction with the Dumbarton Rail Corridor.

9.5.2 Program Subcategory Specific Guidelines

The program specific guidelines and requirements for the Dumbarton Rail Corridor program subcategory are detailed in Table 17.

Program Guideline Category	Guideline Requirement
Eligible Sponsors	The District
Eligible Projects	Capital
Matching Funds	N/A
Timely Use of Funds: Expenditure Timeline	<p>Primary grant agreement and project supplement(s) Execution (all subcategories): Fund recipients must complete a primary grant agreement and project supplement(s) and begin work within one year of allocation unless the TA approves the use of requested funding as leverage for other external grant programs.</p> <p>Operations Subcategory Awards: Operations funding must be spent within four years of executing a primary grant agreement and project supplement(s).</p> <p>Capital Subcategory Awards: For Planning, PE/EV, and PS&E phases: All work on capital projects must be completed within three years of effective date of the executed primary grant agreement and project supplement(s) date if funds are awarded for only one phase of work. If the TA awards funds for more than one phase, it may allow work to be completed within up to five years from primary grant agreement and project supplement(s) execution.</p> <p>For awards that fully fund (“last dollar in”) ROW and CON phases: For ROW only, work on the funded phase must be completed within three years from primary grant agreement and project supplement(s) execution. For funds awarded to ROW and CON phases together, or funds awarded for only CON, the funded work must be completed within five years of execution of the primary grant agreement and project supplement(s).</p> <p>For ROW and CON awards that do not fully fund a phase (“TA funds used as leverage”): a Sponsor has up to five years to secure full funding for the applicable phase(s) and to execute a primary grant agreement and project supplement(s). The same ROW and CON timely use of funds requirements from the previous section applies once the primary grant agreement and project supplement(s) is executed.</p>
Additional Monitoring and Reporting Submittals	Quarterly reporting is required.

Table 17: Transit Dumbarton Rail Corridor Program Subcategory Guidelines

9.5.3 Additional Requirements or Policies

- Upon completion of the SamTrans Dumbarton Feasibility Study, the District may request the TA Board consider whether the Measure A Dumbarton category can fund non-rail improvements along the corridor that do not preclude future rail stations or service.
- Any consideration of future programming and allocation of funds for non-rail improvements would require a separate action from the Board to make a minor amendment to the 2004 Measure A TEP based on feasibility considerations to maximize the opportunity to accomplish Dumbarton Rail Corridor transit use.



9.6 FERRY

The Ferry Program is a subcategory of the Measure A Transit Program and includes no comparable Measure W program category. The Ferry Program comprises 2% of Measure A funds.

9.6.1 Measure A Transit Ferry

The Measure A Transportation Expenditure Plan states:

Provide financial assistance as local match funds for cost-effective ferry service to South San Francisco and Redwood City.

9.6.2 Program Subcategory Specific Guidelines

The program specific guidelines and requirements for the Ferry program subcategory are detailed in Table 18.

Program Guideline Category	Guideline Requirement
Eligible Sponsors	City of South San Francisco and City of Redwood City
Eligible Projects	Capital and Operating
Matching Funds	N/A
Timely Use of Funds: Expenditure Timeline	<p>Primary grant agreement and project supplement(s) Execution (all subcategories): Fund recipients must complete a primary grant agreement and project supplement(s) and begin work within one year of allocation unless the TA approves the use of requested funding as leverage for other external grant programs.</p> <p>Operations Subcategory Awards: Operations funding must be spent within four years of executing a primary grant agreement and project supplement(s).</p> <p>Capital Subcategory Awards: For Planning, PE/EV, and PS&E phases: All work on capital projects must be completed within three years of effective date of the executed primary grant agreement and project supplement(s) date if funds are awarded for only one phase of work. If the TA awards funds for more than one phase, it may allow work to be completed within up to five years from primary grant agreement and project supplement(s) execution.</p> <p>For awards that fully fund (“last dollar in”) ROW and CON phases: For ROW only, work on the funded phase must be completed within three years from primary grant agreement and project supplement(s) execution. For funds awarded to ROW and CON phases together, or funds awarded for only CON, the funded work must be completed within five years of execution of the primary grant agreement and project supplement(s).</p> <p>For ROW and CON awards that do not fully fund a phase (“TA funds used as leverage”): a Sponsor has up to five years to secure full funding for the applicable phase(s) and to execute a primary grant agreement and project supplement(s). The same ROW and CON timely use of funds requirements from the previous section applies once the primary grant agreement and project supplement(s) is executed.</p>
Additional Monitoring and Reporting Submittals	Quarterly reporting is required.

Table 18: Transit Ferry Program Subcategory Guidelines

9.6.3 Additional Requirements or Policies

Redwood City and South San Francisco agreed to split the projected funding 50/50 following the passage of Measure A.

10

**Competitive
Program
Administration**

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

- Highway
- Transportation Demand Management
- Pedestrian and Bicycle
- Peninsula Shuttle Program
- Regional Transit Connections
- Grade Separations

10.1 CFP PROCESS

As described above, Measures A and W 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, Equity & Engagement, Readiness, and Funding Leverage. The Strategic Plan 2025-2029 lays out specific evaluation criteria and supersedes previous Board-adopted short-range planning documents (Short-Range Highway Plan, Alternative Congestion Relief/Transportation Demand Management Plan, and Regional Transit Connections Plan). 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.

TA staff develop 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.

10.1.1 Roles of Different Stakeholders & Decision Makers

PROJECT REVIEW COMMITTEES

Project Review Committees, referred to above and 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 C/ CAG Bicycle and Pedestrian Advisory Committees.

COMMUNITY ADVISORY COMMITTEE

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.

TA BOARD

The TA 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. The Board may periodically assemble an ad hoc committee of its own members to work with staff before a final proposed program of projects is presented for Board approval.

10.1.2 Evaluation Criteria and Equity

A priority for the TA and its stakeholders for the Strategic Plan 2025-2029 is to elevate Equity as a primary evaluation category for all competitive funding programs. Following the adoption of the previous Strategic Plan 2020-2024, three competitive programs have implemented modified evaluation criteria to include Equity as an evaluation category in project selection and prioritization. The remaining programs that will now include the new Equity evaluation category include the Highway, Pedestrian & Bicycle, and Grade Separation programs.

For each Competitive Program the Equity evaluation category will include five individual evaluation criteria. The criteria are based on the ACR/TDM Equity evaluation category and have been expanded to include additional principles of equity as shown below.

- 1. Location-Based Equity:** does the project's geographic extent fall within a local, countywide, regional, state, or federal level equity priority community?
- 2. User-Based Equity:** does the project positively impact transportation affordability, mobility, or access for disadvantaged communities and serve more than one type of mode of travel? Tools such as the Housing and Transportation Affordability Index from the Center of Neighborhood Technology can help identify metrics such as transportation costs as percent of income and availability of autos per household.
- 3. Environmental Justice:** does the project fall within an Environmental Justice (EJ) community (i.e., California Office of Environmental Health Hazard Assessment CalEnviroScreen 4.0) and positively impact those communities with respect to pollution and other public health factors?
- 4. Community Engagement/Involvement:** does the project have demonstrated support from relevant community stakeholders and CBOs in and around the affected communities? To what extent has the project involved/included community stakeholders/members in the project planning process, not solely as part of an areawide/citywide planning process?
- 5. Mitigation of Harmful Impacts:** does the project introduce any potential negative impacts for historically disadvantaged communities? If so, does the project identify ways to address/mitigate these impacts?

The evaluation criteria and associated scoring rubric metrics for each Competitive Program for the Equity evaluation category may vary slightly to best align with the goals and challenges of each program but will each follow the general principles as described above. While the Equity evaluation criteria will replace the previous Strategic Plan 2020-2024 sustainability evaluation category, the sustainability evaluation criteria will be relocated to other evaluation categories.

10.1.3 Geographic Distribution Framework

The Highways, Pedestrian & Bicycle, and Transportation Demand Management Programs each employ a geographic distribution framework to dedicate targets for available funds to different geographic areas and project subcategories, ensuring more parity in distributing funding awards. The two geographic area categories are small/coastal jurisdictions and mid/large jurisdictions. Unincorporated San Mateo County, Caltrans, the District, and Caltrain will be considered on a case-by-case basis as different project locations may have different contexts. For instance, projects or programs proposed in unincorporated communities of less than 20,000 people are eligible under the Small and Coastal category, while a countywide effort would be considered under the Mid and Large category.

The following jurisdictions are eligible to apply under each category.

Small and Coastal Jurisdictions	Mid and Large Jurisdictions
<ul style="list-style-type: none"> • Atherton • Brisbane • Colma • Half Moon Bay • Hillsborough • Pacifica • Portola Valley • Woodside 	<ul style="list-style-type: none"> • Belmont • Burlingame • Daly City • East Palo Alto • Foster City • Menlo Park • Millbrae • Redwood City • San Bruno • San Carlos • San Mateo • South San Francisco

10.2 HIGHWAY PROGRAM

The Highway Program consists of the Measure A Highways and Measure W Countywide Highway Congestion Improvements program categories to allow the TA to administer one consolidated funding program. The Highway Program and related policies are guided by the SRHP and corresponding Highway CIP which was adopted in 2021. The Strategic Plan 2025-2029 provides guidance that supersedes the SRHP. Projects must be included in the 2021-2030 CIP (or subsequent updates), the Measure A TEP, or the Measure W Congestion Relief Plan to be eligible for funding in the Highway Program. Additional projects may be considered with prior approval by TA staff on a case-by-case basis. The Highway Program comprises 27.5% of the total annual funds collected through Measure A and 22.5% of the total annual funds collected through Measure W.



10.2.1 Measure A Highways

The Measure A Transportation Expenditure Plan states:

The Highway Program is divided into two components; funding for highway projects in key congested areas as designated by city, county and TA engineers and confirmed by public input; and funding for supplemental projects for all types of roadways (local-collector-arterial-state route) anywhere in the County.

- **Key Congested Areas (KCA):** Each of these projects is deemed to be of equal importance and they are not expressed in any priority order – **17.3% of Measure A funds**
 - Highway 280 North Improvements
 - Coastside Highway Improvements
 - Highway 92 Improvements
 - Highway 101 Mid-County Improvements
 - Highway 101 South Improvements
- **County-wide Supplemental Roadway Projects (SR):** This project provides funding for supplemental roadway projects critical for congestion reduction in addition to those identified in the key congested areas. Supplemental roadway projects may include any type of roadway (local-collector-arterial-state route) anywhere in the County. A partial list of Candidate Projects is included below. Additional Candidate Projects may be submitted to the TA for consideration to account for changing needs during the 25 year term. Funds will not be adequate to construct all Candidate Projects. The TA will determine Candidate Project selection criteria and prioritization in the Strategic Plan as provided in the Implementation Guidelines. – **10.2% of Measure A funds**
 - Route 35 (I-280-Sneath Lane) widening
 - US 101/Produce Avenue Interchange
 - Route 92 (I-280-Route 35) truck climbing lane
 - Willow Road adaptive signal control system

- US 101 (Sierra Point Parkway – SF/SM County Line) auxiliary lanes
- Geneva Avenue extension
- I-280/John Daly Boulevard Overcrossing (north side) widening
- Junipero Serra Boulevard Improvements in Daly City, Colma and South San Francisco
- US 101/Candlestick Point Interchange
- US 101 (Sierra Point Parkway – San Bruno Avenue) auxiliary lanes
- I-280/I-380 local access improvement
- Highway 101/Sierra Point Pkwy Interchange replacement and Lagoon Way extension
- Triton Drive widening (Foster City)
- Sand Hill Road signal coordination
- *Woodside Road Widening (US 101-El Camino Real)*

10.2.2 Measure W Countywide Highway Congestion Improvements

The Measure W Congestion Relief Plan states:

A total of twenty-two and one-half percent (22.5%) of Tax Proceeds will be invested in highway projects throughout the County 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. Eligible candidate projects will be focused on highway and interchange facilities, including Highway 101, Highway 280, and other highways and their interchanges. Eligible candidate projects can include bicycle and pedestrian components or facilities that are incorporated into and enhance safety for a larger highway or interchange project.

Investment will be made on a discretionary basis according to criteria and award schedules established by the Authority.

- **Highway Congestion Infrastructure Projects:** The focus of this program is on highways and highway interchanges, although projects that alleviate congestion on connecting arterial streets that impact the highway system are also eligible. – **21.5% of Measure W funds**
- **Transportation Demand Management (TDM):** TDM efforts with a nexus to vehicle miles travelled (VMT)/congestion relief that encourage non-Single Occupancy Vehicles (SOV) trips and off-peak trip demand. This program subcategory is discussed further in the Transportation Demand Management Program section – **1% of Measure W funds**

10.2.3 Program Specific Guidelines

The program specific guidelines and requirements for this funding program are detailed in Table 19.

Program Guideline Category	Guideline Requirement												
Funding Cycles	2 Years												
Eligible Sponsors/ Eligible Sponsors	Caltrans, cities and county, C/CAG, TA for countywide significant projects, Express Lane JPA, and Commute.org (for countywide TDM)												
Matching Funds (Standard and Equity Based)	A minimum 10% funding match is required with each phase of work for all projects. A cash match is required for all phases of work except for right of way acquisition												
Minimum Funding Request	N/A												
Maximum Funding Request	N/A												
Maximum Project Contribution (All Phases)	Up to 50% of total project cost (Countywide Significance) Up to 75% of total project cost (local projects only)												
Number of Applications	N/A												
Timely Use of Funds: Expenditure Timeline	Allocated Measures A and W funds are generally expected to be expended on the project within the following time horizons:												
	<table border="1"> <thead> <tr> <th>Phase</th> <th>Upper Duration (months)</th> </tr> </thead> <tbody> <tr> <td>Preliminary Planning Study</td> <td>18</td> </tr> <tr> <td>Project Initiation Document</td> <td>18</td> </tr> <tr> <td>Project Approval/Environmental Document</td> <td>30</td> </tr> <tr> <td>Design</td> <td>36</td> </tr> <tr> <td>Construction</td> <td>42</td> </tr> </tbody> </table>	Phase	Upper Duration (months)	Preliminary Planning Study	18	Project Initiation Document	18	Project Approval/Environmental Document	30	Design	36	Construction	42
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	Design	36											
Construction	42												
If the scope of work cannot be completed within the time of performance for the phases specified above, Sponsors must submit a request in writing to the TA no later than six months before the end of the time for performance to request a time extension. The TA will review the request and grant an extension if it is deemed to be justified at the TA's discretion.													
Additional Monitoring and Reporting Submittals	N/A												

Table 19: Highway Program Guidelines Table

10.2.4 Additional Requirements or Policies

GEOGRAPHIC DISTRIBUTION AND PROGRAM CATEGORIES

The Highway Program incorporates the following geographic distribution and program category framework to allow the TA to more fairly evaluate projects against projects in similar settings in San Mateo County. The geographic categories follow the geographic distribution framework described in **Section 10.1.3**. The proposed distribution targets are as follows:

- Small/Coastal (15%)
- Mid/Large (50%)
- Countywide Significance (35%)

Projects are eligible to apply under the Countywide Significance category that satisfy the requirements laid out in the definition for Countywide Significance stated below:

- Projects must meet at least two of the following screening criteria:
- Project serves a significant amount of person throughput, inclusive of all modes
- Project serves a significant amount of inter-county traffic
- Project significantly improves connections between two or more geographic areas of the county
- Project is a priority component of a countywide or regional multijurisdictional effort

PEDESTRIAN/BICYCLE HIGHWAY OVERCROSSINGS

“Standalone overcrossings” refers to an individual Pedestrian/Bicycle 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 0.01% 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 Pedestrian and Bicycle 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 and not as singular projects from the Measure A Highway Program. As with under Measure A, Measure W enumerated that a standalone Pedestrian and Bicycle overcrossing would not be eligible under the Measure W Highway Program separately from a larger highway or interchange, operational or safety project.

ACCESSORY BICYCLE AND PEDESTRIAN ELEMENTS

Many Highway Program projects include accessory/complementary bicycle and pedestrian infrastructure; examples include US 101/Woodside (State Route 84) Interchange and Highway 1/Manor Avenue Overcrossing. Complete Streets elements that help all users of the transportation are eligible components of projects and are encouraged to address many of the evaluation criteria used in the TA’s Calls for Projects. 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. 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.” 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.

10.2.5 Evaluation Criteria

Projects submitted to the Highway Program are evaluated and prioritized by a TA-assembled review committee. Evaluation criteria for the Highway program are separated into five thematic areas and are weighted by Measure W core principles. The legend for the abbreviations is in [Appendix H-2](#).

All potential candidate projects submitted for funding consideration will be evaluated based on the evaluation criteria listed in Table 21. Note that planning studies and environmental phase requests will be evaluated solely based on the Need, Equity & Community Engagement, Readiness, and Funding Leverage categories given the lack of technical analysis likely not completed until the completion of the more detailed environmental document. However, point values will be reweighted for comparison with all projects. The pre- and post-environmental phase evaluation category weights for the Highway program are detailed in Table 20.

Strategic Plan Evaluation Categories	Pre-Environmental Phases	Post-Environmental Phases
Need	50%	25%
Effectiveness	N/A	40%
Equity & Community Engagement	30%	25%
Readiness	10%	5%
Funding Leverage	10%	5%

Table 20: Highway Program Evaluation Criteria Weightings

Highway Program Evaluation Criteria (Measures A and W)	Applicable Measure W Core Principles	Applicable Measure A Goals	Maximum Points Available
Need			25
Severity of current and projected congestion	W1, W2, W4, W5, W6, W8, W10	A1	5
Need to improve access and connections to jobs, housing, transit hubs and other high activity centers, supporting existing economic activity and spurring new economic development in the vicinity	W1, W2, W4, W8, W9, W10, W11	A2	5
Project recognized in adopted statewide, regional, county or local planning and fund programming documents and demonstrates coordination with adjacent projects/integration of inter-related projects	W1, W2, W3, W4, W5, W6, W8, W9	A4	5
Identified safety issue (e.g., documented collision history due to site conditions that is average for the facility type) higher than	W1, W6, W8, W9, W10	A3	4
Project is primarily an operational improvement (e.g., safety or ITS) rather than infrastructure expansion (e.g., adding general purpose lanes)	W1, W2, W4, W6, W8	A4	3
Regional/Countywide significance, including where applicable, location and relevance on the State Highway Congestion & Safety Performance Assessment for San Mateo County	W1, W2, W6, W8	A1, A2	3
Effectiveness			40
Potential increase in person through-put through accommodating multiple transportation modes (e.g., pedestrian & bicycle access as well as transit infrastructure) where contextually appropriate and to the extent feasible (Complete Streets), including infrastructure for transit (e.g., express lanes, bus only lanes)	W1, W2, W3, W4, W5, W6, W8, W9, W10, W11	A2, A4	7
Ability to relieve congestion/performance improvement (e.g., reduces/eliminates bottleneck) and associated potential travel time savings	W1, W2, W4, W5, W8, W10, W11	A1	7
Potential VMT reduction per capita	W2, W3, W4, W8, W9, W10, W11	A1	7
Ability to address safety issue (e.g., project improves site conditions to reduce potential for collisions)	W1, W6, W8, W9, W10	A3	7
Value: Benefit relative to the amount of funding requested (high impact, low cost - "bang for the buck")	W1, W3, W4, W5, W6, W7, W8		5
Degree to which project reduces GHG emissions and improves air quality	W1, W3, W5, W6, W8, W9, W10	A1	4
Innovative low environmental impact/green infrastructure, including resiliency elements to address climate change	W2, W3, W6, W9	A3, A4	2
Project accounts for long term repair/maintenance needs and ownership (e.g., uses materials with long life cycles, low maintenance costs & has a funding plan for maintenance)	W7	A4	1
Equity & Community Support			25
Location Based Equity: Project improves transportation options for disadvantaged communities/areas	W2	A4	8
User Based Equity: Project Improves transportation affordability, access, or mobility for disadvantaged users	W2	A4	5
Environmental Justice: Degree to which project mitigates pollution and/or improves public health conditions for vulnerable populations	W3, W6, W8	A3, A4	7

Highway Program Evaluation Criteria (Measures A and W)	Applicable Measure W Core Principles	Applicable Measure A Goals	Maximum Points Available
Impact project has on low income, transit dependent, and/or other historically disadvantaged communities	W3, W6, W8	A4	0*
Demonstrates stakeholder support, community engagement, and CBO/advocacy involvement			5
Readiness			5
Clear and complete proposal			2
Project status and schedule			1
Has a credible cost estimate and funding plan			1
Ease and speed of implementation			1
Funding			5
Percent of matching fund contribution			4
Private sector contribution, including public/private partnerships			1
		Total	100

Table 21: Highway Program Evaluation Criteria

* No associated positive point value, up to 2 possible negative points (-2 – 0 range)

10.3 TRANSPORTATION DEMAND MANAGEMENT PROGRAM

The Transportation Demand Management (TDM) program consists of the Measure A Alternative Congestion Relief (ACR) program category and the Measure W TDM subcategory from the Highway program. The TDM Program comprises 1% of the total annual funds collected through Measure A and 1% of the total annual funds collected through Measure W. The TDM Program CFP is guided by the ACR/TDM Plan and includes the following five goals:

- Provide Congestion Relief
- Increase Sustainable Transportation Options
- Promote Sustainability and Health
- Encourage Economic Development Opportunities
- Invest Funding Equitably



10.3.1 Measure A Alternative Congestion Relief

The Measure A Transportation Expenditure Plan states:

This program category provides 0.8% of the tax revenue to encourage efficient use of the transportation network through ride sharing, flexible work hours and other commute alternatives. It also provides 0.2% of the tax revenue for the planning and design of information systems and Intelligent Transportation Systems, which facilitate more efficient use of available highway and transit capacities.

10.3.2 Measure W Transportation Demand Management

The Measure W TDM subcategory from the Highway program comprises 1% of the total annual funds collected through Measure W and is eligible for projects that demonstrate a nexus to VMT and congestion reduction. The TDM subcategory encourages programs and projects that reduce highway congestion including, but not limited to, non-Single Occupant Vehicle (SOV) trips and off-peak trip demand.

10.3.3 Program Specific Guidelines

The program specific guidelines and requirements for this funding program are detailed in Table 22.

Program Guideline Category	Guideline Requirement
Funding Cycles	2 Years
Eligible Sponsors/ Eligible Sponsors	Cities, County, Commute.org, and C/CAG for all available funds. The District and Caltrain for Measure W TDM Competitive funds only
Matching Funds (Standard and Equity Based)	Standard Match: A minimum 10% match is required for all applications regardless of sub-category. TA Local Streets and Transportation funds are an eligible source of matching funds. Funding from other TA funding categories, however, is not considered as an eligible match. The TA will not consider previously incurred costs or previously expended or encumbered funds towards the matching requirement. Staff time in-lieu match is also not accepted. Equity Priority Locations: A reduced 5% match may be requested in advance of submitting for project/program applications located in MTC Equity Priority Communities, Re-Imagine SamTrans Equity Priority Areas, or C/CAG CBPP Equity Focus Areas.
Minimum Funding Request	N/A
Maximum Funding Request	\$500K (TA may increase the max award up to \$1 million if the Cycle 3 CFP is still undersubscribed)
Maximum Project Contribution (All Phases)	Eligible Sponsors are limited to submitting up to three applications per Call for Projects cycle total across all sub-categories.
Number of Applications	Must expend all funds within two years of the executed primary grant agreement and project supplement(s) date
Timely Use of Funds: Expenditure Timeline	Require periodic post-occupancy reporting. C/CAG partner with Commute.org for administering monitoring & reporting processes across the county. Set up a process to help project owners struggling to achieve TDM targets
Additional Monitoring and Reporting Submittals	Eligible Sponsors are limited to submitting up to three applications per Call for Projects cycle total across all sub-categories.

Table 22: Transportation Demand Management Program Guidelines Table

10.3.4 Additional Requirements or Policies

PROGRAM SUBCATEGORIES

Sponsors apply to the TDM Program directly through program subcategories based on project eligibility. The percentage of funds for each subcategory is taken from the available TDM Program funds for each associated Measure. These subcategories are:

Program Subcategory	Percentage of Funds
Intelligent Transportation Systems (ITS)	20%
Commute.org Operations & Shuttle Administration	60%
Countywide TDM Monitoring Program	10%
TDM Competitive Funds	10%

Measure A TDM Program Subcategories:

Program Subcategory	Percentage of Funds
ACR/TDM Planning Funds	10%
TDM Competitive Funds	90%

Measure W TDM Program Subcategories:

GEOGRAPHIC DISTRIBUTION

The TDM program employs the geographic distribution framework for the TDM Competitive Projects funding described in [Section 10.1.3](#). The distribution targets are as follows:

- Small/Coastal (30%)
- Mid/Large (70%)

10.3.5 Evaluation Criteria

Projects submitted to the TDM program are evaluated and prioritized by a TA-assembled review committee. Evaluation criteria for the TDM program were developed in the ACR/TDM Plan and are separated into five evaluation categories. Table 23 shows the evaluation criteria that all potential candidate projects submitted for funding consideration will be evaluated against.

Transportation Demand Management Program Evaluation Criteria (Measures A and W)	Applicable Measure W Core Principles	Applicable Measure A Goals	Maximum Points Available
Need			40
Provide congestion relief and/or reduce VMT	W1, W6, W8, W9	A1	10
Increase sustainable transportation options and provide incentives for alternatives to solo driving	W1, W6, W8, W9, W10, W11	A4	10
Promote sustainability, health, and/or safety	W1, W3, W6, W8	A3	10
Improve access to employment, job centers, business districts, and/or retail opportunities	W2, W4, W8, W11	A2	10
Effectiveness			25
Qualitative explanation of how success of project will be evaluated	W1, W2, W3, W4, W5, W6, W7, W8, W9, W10, W11	A4	15
Project recognized in adopted statewide, regional, county or local planning and fund programming documents	W1, W2, W3, W4, W5, W6, W8, W9	A4	5
Benefit relative to the amount of funding requested (high impact, low-cost projects – “bang for the buck”)	W1, W3, W4, W5, W6, W7, W8		5
Equity & Community Support			25
Location Based Equity: Project improves transportation options for disadvantaged communities/areas	W2	A4	8
User Based Equity: Project Improves transportation affordability, access, or mobility for disadvantaged users	W2	A4	5
Environmental Justice: Degree to which project mitigates pollution and/or improves public health conditions for vulnerable populations	W3, W6, W8	A3, A4	7
Impact project has on low income, transit dependent, and/or other historically disadvantaged communities	W3, W6, W8	A4	0*
Demonstrates stakeholder support, community engagement, and CBO/advocacy involvement			5
Readiness			5
Clear and complete proposal			2
Project status and schedule			1
Has a credible cost estimate and funding plan			1
Ease and speed of implementation			1
Funding			5
Percent of matching fund contribution			4
Private sector contribution, including public/private partnerships			1
		Total	100

Table 23: Transportation Demand Management Program Evaluation Criteria

* No associated positive point value, up to 2 possible negative points (-2 – 0 range)

10.4 PEDESTRIAN & BICYCLE PROGRAM

The Pedestrian & Bicycle Program consists of the Measure A Pedestrian & Bicycle program category and the Measure W Bicycle & Pedestrian program category. The Pedestrian & Bicycle Program comprises 3% of the total annual funds collected through Measure A and 5% of the total annual funds collected through Measure W.

10.4.1 Measure A Pedestrian & Bicycle

The Measure A Transportation Expenditure Plan states:

This project provides funding for the construction of facilities for bicyclists and pedestrians. Eligible projects include paths, trails and bridges over roads and highways. A partial list of Candidate Projects is included below. Additional Candidate Projects may be submitted to the TA for consideration to account for changing needs during the 25-year term. Funds will not be adequate to construct all Candidate Projects. The TA will determine Candidate Project selection criteria and prioritization in the Strategic Plan as provided in the Implementation Guidelines.

10.4.2 Measure W Bicycle & Pedestrian

The Measure W Congestion Relief Plan states:

A total of five percent (5%) of Tax Proceeds will be invested in bicycle, pedestrian, and active transportation projects. Programming of funds under this Category will give priority to those projects that are designed to help reduce traffic congestion by safely connecting communities and neighborhoods with schools, transit, and employment centers; fill gaps in the existing bicycle and pedestrian network; safely cross barriers such as major roads, rail corridors, and highways; improve existing facilities to make them safer and more accessible for cyclists and pedestrians; and make walking or biking a safer and more convenient means of transportation for all county residents and visitors. Bicycle, pedestrian, and other transportation programs that incentivize mode shift to active transportation options will be eligible for funding.

Investment will be made on a discretionary basis according to criteria and award schedules established by the Authority.



10.4.3 Program Specific Guidelines

The program specific guidelines and requirements for this funding program are detailed in Table 24.

Program Guideline Category	Guideline Requirement
Funding Cycles	2 Years
Eligible Sponsors/ Eligible Sponsors	Cities, County, C/CAG, and Commute.org for all subcategories. Public transit agencies that operate in San Mateo County for Measure W funds only. Schools and school districts only for the Safe Routes to School subcategory.
Matching Funds (Standard and Equity Based)	<p>Standard Match: A minimum 10% match is required for all applications regardless of sub-category. TA Local Streets and Transportation funds are an eligible source of matching funds. Funding from other TA funding categories, however, is not considered an eligible match. The TA will not consider previously incurred costs or previously expended or encumbered funds towards the matching requirement. Staff time in lieu of matching funds also is not accepted.</p> <p>Equity-based Reduced Match: A reduced 5% match may be requested in advance of proposal submittal for projects/programs located in MTC Equity Priority Communities, Re-Imagine SamTrans Equity Priority Areas, or C/CAG Comprehensive Bicycle and Pedestrian Equity Focus Areas (Scores between 8 to 10 only). Applicants may not submit proposals assuming use of the reduced match without prior approval of TA staff.</p>
Minimum Funding Request	N/A
Maximum Funding Request	<p>Pre-construction (PLAN, PE/EV, PS&E, ROW) Phases: \$2 million</p> <p>Construction (CON) Phase: \$3.5 million</p> <p>Education & Encouragement Programs: \$250,000</p> <p>Total awards per Sponsor per CFP: Up to \$5 million</p>
Maximum Project Contribution (All Phases)	N/A
Number of Applications	Jurisdictions are limited to sponsoring and submitting up to 3 applications per CFP cycle.
Timely Use of Funds: Expenditure Timeline	Projects or programs must complete a primary grant agreement and project supplement, begin work within one-year of an award, and expend funds within two years of executing the project supplement planning/promotion or up to five years if pre-CON and CON phases are awarded.
Additional Monitoring and Reporting Submittals	N/A

Table 24: Pedestrian & Bicycle Program Guidelines Table

10.4.4 Additional Requirements or Policies

PROGRAM SUBCATEGORIES

Sponsors apply to the Pedestrian & Bicycle Program directly through program subcategories based on project eligibility. These subcategories are:

Program Subcategory	Percentage of Funds
Competitive Plans & Capital Projects	90%
Education & Encouragement	5%
Safe Routes to School (SRTS)	5%

GEOGRAPHIC DISTRIBUTION

The Pedestrian & Bicycle Program will use the geographic distribution framework described in **Section 10.1.3** for the Competitive Plans & Capital Projects subcategory, promoting a fairer distribution of funding awards across San Mateo County. The proposed distribution targets are as follows:

- Small/Coastal: 30%
- Mid/Large: 70%

10.4.5 Evaluation Criteria

Projects submitted to the Pedestrian & Bicycle Program are evaluated and prioritized by a TA-assembled review committee. Evaluation criteria for the Pedestrian & Bicycle program were updated in the Strategic Plan 2025-2029 and are separated into five thematic areas. Table 25 shows the evaluation criteria that all potential candidate projects submitted for funding consideration will be evaluated against.

Pedestrian/Bicycle Program Evaluation Criteria (Measures A and W)	Applicable Measure W Core Principles	Applicable Measure A Goals	Maximum Points Available
Need			20
Accommodates multiple transportation modes (pedestrian, bicycle & access to transit) and may include amenities at transit stations, such as bike lockers micromobility stations	W1, W2, W4, W5, W6, W8, W10	A4	5
Extent that project serves a transportation need (recreation ok if it also serves a commute purpose)	W1, W2, W4, W8, W9, W10, W11	A4	4
Need for safety improvement/enhancement (e.g., project located in area with high rate of documented pedestrian or bicycle use collisions, or where significant barriers exist)	W1, W2, W3, W4, W5, W6, W9	A3	4
Near high density/affordable housing (e.g., Planned Development Areas) in proximity to high quality transit service (high ridership & frequent service)	W1, W2, W4, W8, W10, W11	A2	4
Project recognized in adopted statewide, regional, county or local planning and fund programming documents (e.g., San Mateo County Comprehensive Bicycle and Pedestrian Plan, City Bicycle and/or Pedestrian Plan, Vision Zero Plan, General Plan, Specific Plan, Climate Action Plan)	W1, W2, W6, W8	A4	3
Effectiveness			45
Degree to which the project reduces stress level, increases safety and accommodates people of all abilities	W1, W3, W4, W5, W6, W7, W8	A3	10
Enhances first/last mile connections to employment centers, TOD, transit stations, schools, and other high density/activity areas	W1, W2, W3, W4, W5, W8, W10, W11	A2	6
Potential increase in person throughput (mode share) and potential travel time savings	W1, W2, W4, W5, W8, W10, W11	A2, A4	6
Closes gap in or extends Countywide pedestrian and bicycle network	W1, W3, W5, W6, W8, W9, W10	A2	5
Degree to which project reduces GHG emissions and improves air quality	W2, W3, W4, W8, W9, W10, W11	A1	5
Potential VMT reduction per capita	W1, W6, W8, W9, W10	A1	5
Value: Benefit relative to the amount of funding requested (high-impact, low-cost projects -"bang for the buck")	W1, W2, W3, W6, W8, W9, W10		4
Innovative low environmental impact/green infrastructure, including resiliency elements to address climate change	W3, W6, W8	A3, A4	3
Project accounts for long term repair/maintenance needs (e.g., uses materials with long life cycles, low maintenance costs & has a funding plan for maintenance)	W6, W7	A4	1

Pedestrian/Bicycle Program Evaluation Criteria (Measures A and W)	Applicable Measure W Core Principles	Applicable Measure A Goals	Maximum Points Available
Equity & Community Support			25
Location Based Equity: Project improves transportation options for disadvantaged communities/areas	W2	A4	8
User Based Equity: Project Improves transportation affordability, access, or mobility for disadvantaged users	W2	A4	5
Environmental Justice: Degree to which project mitigates pollution and/or improves public health conditions for vulnerable populations	W3, W6, W8	A3, A4	7
Impact project has on low income, transit dependent, and/or other historically disadvantaged communities	W3, W6, W8	A4	0*
Demonstrates stakeholder support, community engagement, and CBO/advocacy involvement			5
Readiness			5
Clear and complete proposal			2
Project status and schedule			1
Has a credible cost estimate and funding plan			1
Ease and speed of implementation			1
Funding			5
Percent of matching fund contribution			4
Private sector contribution, including public/private partnerships			1
		Total	100

Table 25: Pedestrian & Bicycle Program Evaluation Criteria

* No associated positive point value, up to 2 possible negative points (-2 – 0 range)



10.5 PENINSULA SHUTTLE PROGRAM

The Peninsula Shuttle Program consists of the Local Shuttles subcategory of Measure A Transit program category. The Peninsula Shuttle Program comprises 4% of Measure A funds. The Peninsula Shuttle Program is guided by the Peninsula Shuttle Study prepared by the District and Caltrain with input from Commute.org, C/CAG, and the TA. C/CAG often provides some funding for each competitive CFP.

The Peninsula Shuttle Program includes the following three goals:

- Connectivity: provide first/last-mile connections with regional transit
- Ridership: maximize ridership to help reduce corridor congestion
- Equity: sustain and enhance local mobility for transit-reliant populations

10.5.1 Measure A Transit Local Shuttles

The Measure A Transportation Expenditure Plan states:

This project sponsored by SamTrans would provide matching funding for the operation of local shuttle services.

Priority will be given to shuttle services which include a portion of the funding from businesses, employers and other private sector sources. Priority shall also be given to local services which connect with Caltrain, BART and future Ferry Terminals.

10.5.2 Program Specific Guidelines

The program specific guidelines and requirements for this funding program are detailed in Table 26.

Program Guideline Category	Guideline Requirement
Funding Cycles	2 Years
Eligible Sponsors/ Eligible Sponsors	Shuttle serves residents or employers in San Mateo County Applicants may include local jurisdiction or Commute.org; may also be partnered with other public, non-profit, or private entities to co-sponsor.
Matching Funds (Standard and Equity Based)	All new and existing shuttles require a minimum match of 25%
Minimum Funding Request	N/A
Maximum Funding Request	N/A
Maximum Project Contribution	N/A
Number of Applications	N/A
Timely Use of Funds: Expenditure Timeline	2 years
Additional Monitoring and Reporting Submittals	Applicant agrees to provide AVL and APC data to the District (either via their own system or one provided by the District). Applicant agrees to provide quarterly files summarizing ridership by stop and by trip (in format specified by the District), participation in annual survey by the District, and preparation of quarterly financial/progress reports required by the TA or C/CAG. The applicant agrees to manage customer service and rider feedback with summaries provided in quarterly progress reports.

Table 26: Peninsula Shuttle Program Guidelines Table

10.5.3 Additional Requirements or Policies

PROGRAM ELIGIBILITY

Eligible applicants, including local jurisdictions and/or public agencies within San Mateo County, can apply for funding to establish local shuttle services designed to assist resident and employee travel within the county and/or to connect with regional transportation service (e.g., major SamTrans routes, Caltrain, BART, and ferries). Although a public agency must be the applicant for the funds, they may use another entity such as the District, Commute.org, or others to manage and/or operate the service. Similarly, employers and private entities are not eligible to apply directly but may partner with a local jurisdiction or public agency to sponsor a project. Projects that are coordinated among multiple jurisdictions are encouraged. Other key eligibility requirements include:

- Shuttle Types:
 - Commuter Shuttles
 - Community Shuttles
- Serves county residents & employees
- Governing board resolution with non-supplantation of funds statement required

NEED & SERVICE PRINCIPLES

- Shuttle provides coordinated first/last mile connection to a major transit station or regional bus route: Eligible services include Caltrain, BART, WETA, and regional bus routes (including SamTrans ECR, 292, 110, 17, and 294, as well as Dumbarton Express)
- Shuttle is free, open to the public, and serves a range of users: Shuttles do not limit public access. A single employer does not account for >75% of ridership based on survey data.
- Shuttle vehicles are ADA-accessible and can accommodate bicycles: Shuttle provider opts into District shuttle contract or provides vehicle specifications and photos of independently operated shuttle vehicles

OPERATIONS & READINESS

- Applicant provides an operating plan and service map: Applicant provides operating plan summarizing proposed schedule, stops, and operator. Applicant provides photos of stops. Applicant agrees to notify the TA, C/CAG, and District in writing of service changes in advance of implementation or risk losing funding for periods where changes were implemented.
- SamTrans Shuttle Network Concurrence Review: District Operations Planning will provide a concurrence review of all submitted applications to assess the entire network of shuttles. The review will assess the overlap between existing and proposed bus/shuttle services and access for equity focus areas. Applicants agree to incorporate route or stop modifications recommendations, where feasible.

CUSTOMER SERVICE/INFORMATION

- Applicant provides a Marketing plan: Marketing plan identified to provide information and marketing materials to potential riders. Applicant will be responsible for providing the District with a GTFS feed accompanied by a list and map of stops for use on the District website, app, and third-party trip planning and real-time tracking apps.
- Provide signage at all stops: Applicant agrees to install signage at all stop locations.

PROCESS FOR NEW PROPOSED SHUTTLE SERVICES

Sponsors of new shuttles are required to attend a pre-submittal meeting with TA staff, SamTrans operations planning staff (for community and commuter shuttles), and Commute.org (for commuter shuttles only) for shuttle technical assistance prior to the submittal of an application. In the pre-submittal meeting, staff will agree on the most appropriate technical metrics to be used as assumptions for assessing the proposed service during the CFP. District staff will also confirm that the shuttle route(s) generally do not duplicate SamTrans fixed-route services and will make routing or stop suggestions.

10.5.4 Evaluation Criteria

Projects submitted to the Peninsula Shuttle Program are evaluated and prioritized by a TA and C/ CAG-assembled review committee. Evaluation criteria for the Local Shuttles Transit Program were updated in the Peninsula Shuttle Study and are separated into three thematic areas. Table 27 shows the evaluation criteria that all potential candidate projects submitted for funding consideration will be evaluated against.

Peninsula Shuttle Program Evaluation Criteria (Measure A)	Applicable Measure A Goals	Maximum Points Available
First/Last Mile Need		25
Project serves new geographic areas and provides new and/or substantially different service	A2, A4	10
Percent of matching fund contribution		10
Assessment of first/last mile need	A2, A4	5
Ridership		50
Potential for increasing daily ridership	A1, A4	10
Potential to improve service productivity	A4	10
Potential to improve cost efficiency		10
Potential VMT reduction per capita	A1	10
Assessment of ridership growth potential	A4	10
Equity & Community Support		25
Location Based Equity: Project improves transportation options for disadvantaged communities/areas	A4	8
User Based Equity: Project Improves transportation affordability, access, or mobility for disadvantaged users	A4	5
Environmental Justice: Degree to which project mitigates pollution and/or improves public health conditions for vulnerable populations	A3, A4	7
Impact project has on low income, transit dependent, and/or other historically disadvantaged communities	A4	0*
Demonstrates stakeholder support, community engagement, and CBO/advocacy involvement		5
Total		100

Table 27: Peninsula Shuttle Program Evaluation Criteria

* No associated positive point value, up to 2 possible negative points (-2 – 0 range)

10.6 REGIONAL TRANSIT CONNECTIONS

The Regional Transit Connections (RTC) Program consists of the Measure W RTC program category. The RTC program is guided by the RTC Plan, adopted in October 2024, and associated CIP which includes the following four goals:

- Increase regional transit services and enhance infrastructure to improve transit speed and reliability.
- Establish more direct regional transit routes and supportive infrastructure to facilitate transit trips with fewer or cheaper transfers to increase transit use and reduce congestion in major highway corridors.
- Promote equitable regional transit programs, operations, and supportive infrastructure that improve connectivity between transit operators, enhance customer experience, help provide off-peak travel options, and increase safety for all riders.
- Develop a first/last-mile system that creates access for all ages and abilities to regional transit stations and supports connected micromobility.



10.6.1 Measure W Regional Transit Connections

The Measure W Congestion Relief Plan states:

A total of ten percent (10%) of Tax Proceeds will be invested in infrastructure and services that are designed to improve transit connectivity between the County and the region. Currently, the County is connected to neighboring counties and the broader region with a network of transit options including rail, water transit, heavy rail, and regional bus services. More and more county residents are traveling longer distances to get to their jobs. Today, over sixty percent (60%) of residents commute to jobs in neighboring counties, and the vast majority of them drive alone, increasing congestion on already crowded highways.

Investments from this Category will be prioritized based on a project's ability to reduce congestion, a project's ability to enhance mobility options by connecting the county to the rest of the region, and a project's support through public private partnerships.

Investment will be made on a discretionary basis according to criteria and award schedules established by the Authority.

10.6.2 Program Specific Guidelines

The program specific guidelines and requirements for this funding program are detailed in Table 28.

Program Guideline Category	Guideline Requirement
Funding Cycles	4 Years
Eligible Sponsors/ Eligible Sponsors	Public transit agencies that operate within or to/from San Mateo County including Peninsula Corridor Joint Powers Board (Caltrain), the District, AC Transit, WETA, BART, SFMTA, and VTA
Matching Funds (Standard and Equity Based)	<p>Standard Match: A minimum 10% match is required for all applications regardless of sub-category. Matching funds can be any non-RTC funding source. The TA will not consider previously incurred costs or previously expended or encumbered funds towards the matching requirement. Staff time in-lieu match is also not accepted.</p> <p>Equity Priority Locations: A reduced 5% match may be requested in advance of submitting for project/program applications located in MTC Equity Priority Communities, ReImagine SamTrans Equity Priority Areas, or C/CAG CBPP Equity Focus Areas.</p>
Minimum Funding Request	Require a minimum request of \$500,000 per allocation except for planning or feasibility study phases in support of a capital project.
Maximum Funding Request	Limit individual requests/allocations per CFP cycle to \$25 million for capital projects, \$5 million for operational projects, and \$5 million for first/last-mile projects (whether capital or operations).
Maximum Project Contribution (All Phases)	50% of total project cost
Number of Applications	Eligible Sponsors may submit up to three applications per RTC CFP cycle. If a Sponsor acts solely as the lead agency to support a regional transit-related program with a separate implementing agency, the eligible Sponsor may submit one additional application.
Timely Use of Funds: Expenditure Timeline	<p>Primary grant agreement and project supplement(s) Execution (all subcategories): Fund recipients must complete a primary grant agreement and project supplement(s) and begin work within one year of allocation unless the TA approves the use of requested funding as leverage for other external grant programs.</p> <p>Operations Subcategory Awards: Operations funding must be spent within four years of executing a primary grant agreement and project supplement(s).</p> <p>Capital Subcategory Awards: For Planning, PE/EV, and PS&E phases: All work on capital projects must be completed within three years of effective date of the executed primary grant agreement and project supplement(s) date if funds are awarded for only one phase of work. If the TA awards funds for more than one phase, it may allow work to be completed within up to five years from primary grant agreement and project supplement(s) execution.</p> <p>For awards that fully fund (“last dollar in”) ROW and CON phases: For ROW only, work on the funded phase must be completed within three years from primary grant agreement and project supplement(s) execution. For funds awarded to ROW and CON phases together, or funds awarded for only CON, the funded work must be completed within five years of execution of the primary grant agreement and project supplement(s).</p> <p>For ROW and CON awards that do not fully fund a phase (“TA funds used as leverage”): a Sponsor has up to five years to secure full funding for the applicable phase(s) and to execute a primary grant agreement and project supplement(s). The same ROW and CON timely use of funds requirements from the previous section applies once the primary grant agreement and project supplement(s) is executed.</p>
Additional Monitoring and Reporting Submittals	N/A

Table 28: Regional Transit Connections Program Guidelines Table

10.6.3 Additional Requirements or Policies

PROGRAM SUBCATEGORIES

Sponsors apply to the RTC Program directly through program subcategories based on project eligibility. These subcategories are:

Program Subcategory	Percentage of Funds
Capital	60%
Operations	30%
First/Last-Mile	10%

GENERAL POLICIES

- All projects should align with MTC's Plan Bay Area 2050+ including Transit 2050+ and the Bay Area Transit Transformation Action Plan.
- To be compliant with the Measure W Congestion Relief Plan, RTC funds may only be used to supplement existing available funding and may not be used to replace (supplant) funds previously allocated to or budgeted for a project.
- Projects that may be eligible in multiple TA programs generally should apply for funding outside of the RTC Program first. For example, projects located primarily on the highway system should apply for funding from the TA's Highway program.
- If the 2004 Measure A is not renewed, Peninsula Shuttle Program routes that access regional transit would be eligible for funds from the first/last-mile subcategory.
- The TA may consider requests above the maximum requested amount each cycle, and/or recommend reduced funding awards, depending on whether the individual CFP cycle is over- or undersubscribed. As part of the Draft RTC Program of Projects, staff would provide an option for the TA Board of Directors to consider and provide direction for the Final RTC Program of Projects in each CFP cycle.
- The CIP should be updated after every two CFP cycles.

CAPITAL PROJECTS POLICIES

- Capital projects must be located within San Mateo County.
- All phases of work such as planning (planning, project study report, feasibility studies, etc.), PE/EV, design, ROW, and CON are eligible if they are in the support of the development and delivery of a capital project.
- RTC funds cannot be used for general state of good repair or maintenance projects.
- Maximum TA contributions include:
 - For projects over \$25 million total for all phases of work, the TA will contribute up to 50% of the total cost toward the project
 - For projects under \$25 million total for all phases of work, the TA will contribute up to 75% of the total cost toward the project

- Eligible applicants may request an exception to this policy if they can document that they have exhausted all other reasonable eligible local, county, regional, state, and federal funding opportunities. Eligible applicants must work with TA staff to have an approved credible funding plan and grant strategy prior to submitting a CFP application.

OPERATIONS PROJECT POLICIES

- Operations funds may be used to support services that extend beyond the San Mateo County borders into adjacent counties as long as costs paid with RTC funds are proportionate to anticipated service levels in San Mateo County relative to adjacent counties (i.e., based on proportions shares of boardings and/or alighting).
- Operations funds may not be used to support existing operations and are intended to support new or expanded services. Expanded services may include increased frequencies, customer experience programs, or service level augmentation for existing routes.
- A new service, program, or expanded service may apply with a ten percent (10%) match for its first award of RTC funds and is eligible to apply for only one directly subsequent call for projects with a 25% match requirement. A “new” service or program is one that has not received Measure W RTC funding previously. A service will no longer be considered “new” or “expanded” if it has received two awards for funding from this program.

FIRST/LAST MILE PROJECT POLICIES

- Capital first/last-mile projects must be identified as a priority project in a transit agency’s station access improvement or equivalent plan. If an agency does not have such a plan, these funds may be used to develop one with no required match to ensure all agencies are equally able to support and identify priority first/last-mile projects in San Mateo County. If an agency wishes to include areas outside of San Mateo County, the agency must proportionally fund the effort based on the number of stations/terminals to be included within and outside the county.
- Projects must improve connections within three miles of regional transit connections.
- Capital projects for micromobility (includes bikeshare or scooter share) are eligible only if they directly support the regional transit network, such as with siting and construction of bikeshare stations that would provide access within three miles of, or on-site at, a transit station/terminal.
- Capital project investments from the RTC program for micromobility resulting in new operations would also be eligible for up to \$2.0 million in operating funds each CFP cycle.
- Operations funds without a corresponding capital project for micromobility or bikeshare are also eligible if they support on-going implementation of a system in San Mateo County that directly supports first/last-mile access to transit stations/terminals.
- If a micromobility or bikeshare system is managed by a regional agency or extends outside of San Mateo County, the maximum San Mateo County contribution should be proportional to the services provided within the county.

10.6.4 Evaluation Criteria

Projects submitted to the RTC Program are evaluated and prioritized by a TA-assembled review committee. Evaluation criteria for the RTC Program were developed in the RTC Plan and are separated into five thematic areas. Table 29 shows the evaluation criteria that all potential candidate projects submitted for funding consideration will be evaluated against.

Regional Transit Connections Program Evaluation Criteria (Measure W)	Applicable Measure W Core Principles	Maximum Points Available
Connectivity		30
Increase access and connections to jobs, housing, transit hubs, and other high activity centers to support existing economic activity and spur economic development in the vicinity	W1, W2, W4, W6, W8, W10, W11	5
Improve service frequency (e.g., headways), reliability (e.g., on-time performance), and coordinated seamless connections with other transit systems (e.g., schedule alignment)	W1, W2, W6, W7, W8, W10, W11	10
Improves connectivity, integration, and coordination between local and regional transit services	W1, W2, W6, W8, W10, W11	10
Improve travel time savings	W1, W2, W8, W10	5
Sustainability & Cost Effectiveness		20
Reduce congestion on existing transit route/corridor	W1, W2, W4, W8, W10	4
Relieve congestion for regional trips and reduction in VMT per capita	W1, W2, W3, W5, W7, W8, W10, W11	4
Increase transit ridership and induce mode shift from SOV trips	W1, W2, W8, W10, W11	4
Value: Benefit relative to the amount of funding requested (high impact, low cost - "bang for the buck")	W1, W3, W4, W5, W6, W7, W8	3
Reduce GHG emissions and improve air quality	W2, W6, W10	2
Investment in clean air/zero emission vehicle technology	W3, W6, W8	2
Private sector contribution, including public/private partnerships (e.g., value capture of terminal land with revenues reinvested in support of service)	W2, W4, W5	1
Safety & Customer Experience		20
Provide first/last-mile access options/accommodations as part of the project	W1, W2, W5, W6, W8, W9, W11	8
Improve safety for the transit service and for access to services for all users	W2, W6, W10	6
Promotes a high-quality transit rider experience through enhancements such as wayfinding, rider displays, amenities, programmatic security/enforcement strategies, etc.	W2, W6, W9, W10	6
Equity & Community Support		25
Location Based Equity: Project improves transportation options for disadvantaged communities/areas	W2	8
User Based Equity: Project Improves transportation affordability, access, or mobility for disadvantaged users	W2	5
Environmental Justice: Degree to which project mitigates pollution and/or improves public health conditions for vulnerable populations	W3, W6, W8	7
Impact project has on low income, transit dependent, and/or other historically disadvantaged communities	W3, W6, W8	0*
Demonstrates stakeholder support, community engagement, and CBO/advocacy involvement		5

Regional Transit Connections Program Evaluation Criteria (Measure W)	Applicable Measure W Core Principles	Maximum Points Available
Readiness		5
Clear and complete proposal		1
Project status and schedule		1
Has a credible cost estimate and funding plan		1
Ease and speed of implementation		1
Applicant experience and ability to deliver project on time and on budget with examples		1
	Total	100

Table 29: Regional Transit Connections Program Evaluation Criteria

* No associated positive point value, up to 2 possible negative points (-2 – 0 range)



10.7 GRADE SEPARATION PROGRAM

The Grade Separation Program consists of the Measure A Grade Separation program category and the Measure W Local Safety, Pothole & Congestion Relief Improvements (Grade Separations) program category. The Grade Separation Program comprises 15% of the total annual funds collected through Measure A and 2.5% of the total annual funds collected through Measure W.

10.7.1 Measure A Grade Separation

The Measure A Transportation Expenditure Plan states:

This project provides funding for the construction or upgrade of overpasses and underpasses (grade separations) along the Caltrain and Dumbarton rail lines. The Candidate Projects are listed below. Funds will not be adequate to construct or upgrade all Candidate Projects. The TA will determine Candidate Project selection and prioritization in conjunction with the project sponsors, based upon the California Public Utilities Commission formula and the desire of the City involved.

10.7.2 Measure W Local Safety, Pothole & Congestion Relief Improvements (Grade Separations)

The Measure W Congestion Relief Plan states:

A total of twelve and one-half percent (12.5%) of Tax Proceeds will be invested in major arterial and local roadway improvements in key congested areas throughout the county. These investments will be focused on improving safety, reducing congestion, and supporting all modes of travel on the county's roadway system. Eligible investments include, but are not limited to, the following: implement advanced technologies and communications on the roadway system; improve local streets and roads by paving streets and repairing potholes; promote alternative modes of transportation, which may include funding shuttles or sponsoring carpools, bicycling and pedestrian programs; plan and implement traffic operations and safety projects, including signal coordination, bicycle/pedestrian safety projects, and separation of roadways crossing the Caltrain rail corridor.

Two and a one-half percent (2.5%) of the Tax Proceeds (out of the 12.5% total Tax Proceeds designated for this Category) will be invested in grade separations on a discretionary basis in accordance with criteria and award schedules established by the Authority.

10.7.3 Program Specific Guidelines

The program specific guidelines and requirements for this funding program are detailed in Table 30.

Program Guideline Category	Guideline Requirement
Funding Cycles	Competitive, Rolling for previously selected Pipeline Projects
Eligible Sponsors/ Eligible Sponsors	The District, JPB, cities and county
Matching Funds	Pre-construction: 10% Construction: 50%
Minimum Funding Request	N/A
Maximum Funding Request	N/A
Maximum Project Contribution (All Phases)	Up to 50% of total project cost
Number of Applications	N/A
Timely Use of Funds: Expenditure Timeline	N/A
Additional Monitoring and Reporting Submittals	N/A

Table 30: Grade Separation Program Guidelines Table

10.7.4 Additional Requirements or Policies

MEASURE A GRADE SEPARATION PROGRAM PRINCIPLES (2016)

Due to the high cost of grade separation projects and the limited funding available through Measure A, the Board adopted guiding principles setting the framework to establish a pipeline of grade separation projects. These criteria were adopted in 2013 and updated in 2016.

FUNDING

Focus remaining funding on the projects previously approved by the San Mateo County Transportation Authority (TA) for pre-construction funding but set aside up to \$5 million to assist with planning for other eligible grade separation projects listed in the Transportation Expenditure Plan that were not funded in 2013 or 2014. Rapidly increasing grade separation project costs will require the TA to revisit the grade separation guidelines for Measure A and how Measure W funds are distributed.

PROGRAMMING AND ALLOCATION

Program and allocate funds to separate project phases:

- Planning – Study project alternatives and develop cost estimates for different options, including at least one that is consistent with the Caltrain/High-speed Rail Blended System.
- Preliminary Engineering/Environmental Assessment – Complete necessary State and/or Federal environmental assessment for the project; project must have (a) City Council approval to move forward, and (b) Caltrain concurrence with the selected project alternative.
- Design – Complete final design in close coordination with Caltrain to ensure railroad design standards are met and complete value engineering; project must have (a) City Council approval to proceed, and (b) Caltrain concurrence with the selected project alternative.
- Construction - Project must have a full funding plan; construction must be done by Caltrain; project must have (a) City Council approval and (b) demonstrated local community support to proceed.

Measure A funds will only be allocated to a particular phase when Sponsor demonstrates an earlier phase has been satisfactorily completed.

PROJECT SELECTION PROCESS

- In general, evaluation criteria should consider:
 - Project's ability to improve safety and relieve local traffic congestion at the crossing
 - Project's ability to improve railroad's operational flexibility
 - Project readiness
 - Project effectiveness
 - Geographic equity, considering where funds from the Grade Separation Program have previously been allocated
 - Extent to which project can support economic development
 - Funding leverage: Sponsor's ability to secure, at a minimum, matching funds for the construction of the project.

- Project must be supported by Caltrain, and Sponsor must include Caltrain as a project partner early in the planning process.
- Instead of utilizing a call-for-projects process, accept funding requests for the projects on an as-needed, first come first served basis, and taking into consideration Caltrain’s assessment of the proposed project in the Caltrain Grade Crossing Hazard Analysis, and the project’s ranking in the Public Utilities Commission’s listed priorities, in addition to the evaluation criteria listed above.

10.7.5 Evaluation Criteria

Projects submitted to Grade Separation Program are evaluated and prioritized on a first-come, first-serve, ready-to-go basis. The Evaluation criteria for the Measure A Grade Separation Program shown in Table 31 was adopted in the previous Strategic Plan 2020-2024. No Measure W Grade Separation Program evaluation criteria has been developed pending the adoption of the Caltrain Corridor Crossings Strategy and updated funding plan for the next pipeline project (Broadway Burlingame).

Grade Separation Program Evaluation Criteria (Measure A)
Projects considered on an as-needed basis that demonstrate the ability to meet the following criteria
Project's ability to improve safety and relieve local traffic congestion at the crossing
Project's ability to improve railroad's operational flexibility
Project readiness
Project effectiveness
Geographic equity, considering where funds from the Grade Separation Program have previously been allocated
Extent to which project can support economic development
Funding leverage: Sponsor's ability to secure, at a minimum, matching funds for the construction of the project
Project must be supported by Caltrain, and Sponsor must include Caltrain as a project partner early in the planning process
The project's ranking in the Public Utilities Commission's listed priorities, in addition to the evaluation criteria listed above

Table 31: Measure A Grade Separation Program Evaluation Criteria

11

Technical Assistance Program

The Strategic Plan 2025-2029 formalizes and expands upon the current technical assistance offerings the TA provides into a Technical Assistance Program. The newly branded TA Technical Assistance Program consists of offerings available to eligible project initiators, Sponsors, and managers for all Measures A and W funding programs both during and between CFP cycles. With the adoption of the Strategic Plan 2025-2029, the TA will set aside \$2 million in available Measure A interest earnings to fund the Technical Assistance Program and will periodically assess the need for additional funds.

CFP PLANNING & RESOURCES

To provide additional support in advance of CFP cycles, the TA will hold office hours periodically throughout each year to provide Sponsors with the opportunity to discuss potential projects and to provide feedback ahead of upcoming CFP's. The TA will provide dedicated times/availability and Sponsors will set up meeting requests through Zoom. The goal of these office hours is to guide project development and provide jurisdictions with the resources necessary to submit quality applications in the next CFP cycle.

In addition to holding office hours prior to CFP cycles, the TA will continue to offer optional pre-submittal meetings and early application reviews and will extend these offerings to each competitive Measures A and W program. Due to the high number of applications for some competitive programs, early application reviews are subject to availability and the number of potential applications.

TECHNICAL TRAININGS AND WORKSHOPS

The TA will offer technical trainings to partner agency staff on best practices for applicable Measures A and W program categories. A training plan and schedule will be developed and may cover topics requested by Sponsors, partner agencies, or to promote better compliance with TA requirements.

STAKEHOLDER ADVISORY GROUP (SAG) AND TECHNICAL ADVISORY GROUP (TAG) MEETINGS

The TA will continue to host SAG/TAG meetings each quarter, in conjunction with the District, to communicate TA updates, solicit input on TA programs and projects, and provide CFP lookaheads.

PROJECT IMPLEMENTATION SUPPORT

The TA will continue to offer project implementation support where the TA acts as the implementing agency in partnership with local jurisdictions to help deliver projects. The TA will assess whether it is effective for the TA to continue acting as the implementing agency during the construction phase of projects, or if this offering will only be available for pre-construction phases. Technical assistance budgets for project implementation will continue to be allocated separately as part of each CFP cycle.

Following construction of the 101/Broadway and 101/Willow landscaping projects, the TA will assess its effectiveness and capacity to continue to serve as the implementing agency for the construction phase to inform whether to continue as part of the Technical Assistance Program.

GRANT SUPPORT AND APPLICATION ASSISTANCE

In addition to supporting CFP applications, the TA may provide support to Sponsors requesting assistance for non-TA grant applications. Through strategic guidance and staff support, the TA will assist in identifying grant opportunities for potential projects and provide resources to help with preparing competitive applications for external funding opportunities to leverage Measures A and W funds.

COMMUNITY BENEFIT ORGANIZATION (CBO) BENCH

The TA will formalize a bench of CBOs to support jurisdictions on projects to better reflect the needs of the underserved communities and strengthen grant applications. This will streamline the process of connecting Sponsors with community organizations and promote stronger applications with more community support.

BEST PRACTICE DESIGN REVIEWS

The TA will require any project wishing to request funding for a construction phase of work from the Ped/Bike and Highway Programs to have participated in Third-party Best Practice Design Review at a minimum of 30% design with TA staff and one of the TA's consultants. The level of review and potential recommendations will be determined by the complexity of the project and the potential cost/implementation timeline, which the TA understands will vary by project. The Best Practice Design Reviews will be available on an open, rolling basis. The reviews may also be extended to other program categories on a case-by-case basis.

CONSULTANT BENCH ACCESS

The TA will facilitate access to and provide funding for third-party consultant assistance for Sponsors who have received TA funding. The TA will utilize its consultant bench for project implementation support, technical trainings and workshops, grant assistance, and design reviews.

12

Key Actions for 2025-2029

Using the results of the workshops held and surveys distributed to the TA Board of Directors, CAC, C/CAG Congestion Management TAC, and SAG/TAG, the following key actions were developed to guide future TA staff actions for the Strategic Plan 2025-2029 timeframe:

1. Continue with the established CFP processes for the competitive Shuttle, Highway, Pedestrian & Bicycle, ACR and TDM programs, and implement a CFP for the newly adopted RTC program.
2. Update the Highway program CIP in coordination with the TA's Highway program Sponsors with a specific emphasis on updating the Measure A Supplemental Roadways list to better reflect multimodal arterial needs across San Mateo County that connect with the state highway system.
3. Promote and expand the Technical Assistance Program, as defined in **Section 11**, to aid Sponsors with funding and implementing projects. Continue to help secure funding from external grant programs, leveraging Measures A and W interest earnings when available.
4. Develop Program Management Guidelines to set expectations and standards for internal TA project management processes, reporting and monitoring requirements, and to establish processes for when the TA is implementing projects in partnership with an external agency as part of the Technical Assistance Program. As part of the Program Management Guidelines development, create enhanced oversight protocols and a change management processes for large Capital investment projects over \$25 million.
5. Continue to implement the 101 Corridor Connect Program by adopting the North, Mid, and South County Multimodal Strategies and Active 101 initiatives. Partner with cities to create implementation plans for priority congestion management projects and monitor progress.
6. Execute new Primary Grant Agreements and project supplements with Sponsors to streamline how the TA documents award and use of Measures A and W funds for transportation programs and projects throughout San Mateo County.
7. Procure and implement a Grant Management platform to host all CFPs and to provide an easy-to-use platform for Sponsors to track and fill in quarterly reporting for all TA funding awards.
8. Develop a Key Performance Metrics dashboard and create a consolidated set of metrics for all funding programs that align with the California State Transportation Agency's Climate Action Plan for Transportation Infrastructure and the Caltrans Systemwide Investment Strategy which can be integrated into future reporting on projects. Continue to maintain the funded projects map and expand the included information to inform tracking of key performance indicators.
9. Support and participate in the Grand Boulevard Initiative (GBI) relaunch, an initiative to revitalize El Camino Real into a vibrant, people-friendly place. GBI is being led by the District in partnership with Caltrans, C/CAG, MTC, and local jurisdictions.
10. Increase coordination with C/CAG and Caltrans to strategically advance Measures A and W goals, exploring opportunities to combine funding for projects or streamline the number of county-level CFPs.
11. Further explore and consider debt financing or internal borrowing of funds as needed to advance projects.
 - Funding advances would be backed by future Measure A and/or Measure W receipts.
 - Need to consider financing costs and future construction cost increases.

12. Elevate the TA's presence within the transportation industry by participating or presenting at state and national industry conferences, attending regional industry events, participating in local forums, and hosting educational workshops that advance TA initiatives and priorities.
13. Begin preparations and identify activities to support reauthorization of Measure A.

