

2016
MEASURE B



2016 법안 B 회계연도 2024 연례 보고서



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요약: 총괄 관리자의 메시지



산타클라라 카운티 주민 여러분께,

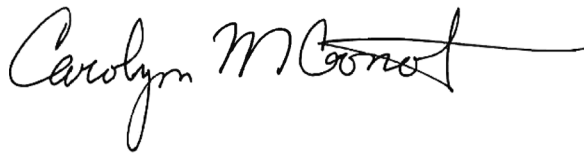
VTA의 2016 법안 B 회계연도 2024 연례 보고서를 제공하게 되어 기쁩니다.

VTA는 산타클라라 카운티를 오가는 모든 사람들을 위해 효율적이고 효과적인 교통 솔루션을 제공할 책임이 있습니다. 2016 법안 B 판매세 프로그램은 실리콘 밸리의 지속적인 발전을 위해 지역사회의 이익을 지원하는 다양한 교통 프로젝트에 자금을 지원함으로써 이러한 약속을 이행하는 데 중요한 역할을 합니다.

2016 법안 B 프로그램은 보행자 및 자전거 인프라 개선부터 혁신적인 대중교통 솔루션 개발에 이르기까지 변화하는 교통 수요를 해결하기 위해 파트너 기관들과 지속적으로 협력하고 있습니다. 단 5년 만에 이 기금은 **9억 5천만** 달러 이상을 카운티에 재투자하여 교통망 개선을 실현했습니다.

프로그램의 지속적인 개발, 성장, 자금 할당 및 지출에 대해 자세히 설명하는 2024 회계연도 연례 보고서를 계속 확인하시기 바랍니다.

VTA는 미래 세대를 위한 신뢰할 수 있고 지속 가능한 교통망을 구축하기 위해, 2016 법안 B의 대상 프로그램과 프로젝트를 제공하는 데 있어 지역사회 및 파트너들과 지속적인 협력을 기대합니다.



Carolyn M. Gonot
총괄 관리자/CEO

1.1 서론

2016 법안 B는 대중교통, 고속도로, 고속도로 및 활동적인 교통(자전거, 보행자 및 완전 도로)을 개선하기 위해 유권자의 승인을 받아 30년간 카운티 전체에 0.5%의 판매세를 부과하는 법안입니다. 이 법안은 산타클라라 카운티 교통세 중 가장 높은 지지율인 약 72%의 찬성으로 통과되었습니다. 세금 징수는 2017년 4월 1일부터 시작되었습니다.

2016 법안 B는 유권자 승인 사업의 진행을 위해 기관들이 지속적으로 자금을 지원하고 있습니다. 2016 법안 B 프로그램은 경쟁 방식 및 비경쟁 방식의 기금 지원을 통해 주민들이 지지하는 프로젝트와 이니셔티브가 실행될 수 있도록 지원합니다.

1.2 보고서의 목적

VTA는 2016 법안 B 판매세 프로그램의 투명성을 확보하기 위해 최선을 다하고 있습니다. 본 연례 보고서는 진행 상황에 대한 최신 정보를 제공함으로써 이러한 약속의 일부를 이행합니다. 본 보고서의 목적은 2016 법안 B 판매세 프로그램과 관련된 2024 회계연도(2023년 7월 1일 ~ 2024년 6월 30일) 정보를 검토하는 것입니다. 여기에는 수익, 기금 배분, 기금 지출과 같은 재정 정보가 포함됩니다. 또한, 본 보고서는 각 프로그램 범주의 성과와 지출 내역을 요약합니다.

본 보고서의 데이터는 2024 회계연도의 데이터와 2024 회계연도까지의 누적 데이터를 제공합니다. 2024 회계연도까지의 데이터는 2017년 판매세 조치 시행 이후부터 포괄적입니다.

2. 2016 법안 B 판매세 재무 정보

2.1 프로그램 수입

2016 법안 B 판매세 수입은 캘리포니아 세무 및 수수료 관리국(CDFTA)에서 매년 계산하는 순수입입니다. 이자 또는 기타 재정적 의무에서 발생하는 수익은 발생 소득이라고 합니다.

세금에 대한 이자 또는 기타 수입을 포함하여 세금의 30년 수명 동안 수령한 세금 수입에서 부채 상환 및/또는 차입 비용의 충족에 필요한 자금과 보조금 관리 및 재무 관리 비용과 같은 프로그램 관리 및 감독 비용을 차감한 금액을 프로그램 세금 수입이라고 합니다.

총 수입

아래 표는 회계연도별 및 시작 이후 2016 법안 B 프로그램의 총 판매세 수입을 보고합니다. 지역 경제가 변동하고 소비자 지출 경향이 변화함에 따라 순수입 가치도 달라집니다.

표 2.1.1 - 회계연도별 2016 법안 B 판매세 수입

회계연도별 2016 법안 B 판매세 수입	
회계연도	순수익
FY 2017*	\$50,126,395
FY 2018	\$205,963,666
FY 2019	\$236,663,888
FY 2020	\$209,324,347
FY 2021	\$220,361,852
FY 2022	\$258,000,059
FY 2023	\$272,987,913
FY 2024	\$266,617,738
개시 이후 합계	\$1,720,045,857

*2017년 4월 1일~2017년 6월 30일만 해당.

총 발생 소득

아래 표는 2024 회계연도에 벌어들인 총 수입을 보고합니다. VTA 2024 회계연도 연간 종합 재무 보고서 (ACFR)에 따르면, 벌어들인 수익은 아래 표에 표시된 것처럼 “...이자 소득, 미실현 이익/손실, 거래 이익/손실과 관련이 있으며...[그리고] 단기, 중기, 장기 투자 포트폴리오의 세 가지 주요 출처에서 파생됩니다.”

이 표에서는 획득 소득과 미실현 소득을 구분합니다. 프로그램 세수익 계산에는 이자와 실현된 거래 이익/손실만 포함되기 때문입니다. 미실현 이익/손실은 실제 수익이나 손실이 아니기 때문에 계산에 포함되지 않습니다.

표 2.1.2 - 회계연도별 2016 법안 B 획득 소득

회계연도별 2016 법안 B 획득 소득		
회계연도	획득 소득	미실현 소득**
FY 2017*	\$0	\$0
FY 2018	\$0	\$0
FY 2019	\$4,833,749	\$137,013
FY 2020	\$16,270,856	\$6,529,136
FY 2021	\$12,713,074	-\$10,885,812
FY 2022	\$7,080,418	-\$28,222,407
FY 2023	\$16,212,004	\$2,754,547
FY 2024	\$33,515,090	\$15,944,682
개시 이후 합계	\$90,625,191	-\$13,712,841

* 2017년 4월 1일~2017년 6월 30일만 해당.

** 미실현 수익은 프로그램 세금 수입 계산 시 포함되지 않는 미실현 이익/손실 및 상각액을 포함합니다.

프로그램 세수익

프로그램 세수익은 획득 소득, 수익 및 관리 비용의 합계입니다. 2024 회계연도 프로그램 세수익 총액은 아래와 같습니다. 프로그램 세수익 계산 시에는 이자와 실현된 거래 손익만 포함됩니다. 미실현 이익/손실은 실제 수익이나 손실이 아니기 때문에 계산에 포함되지 않습니다.

표 2.1.3 - 프로그램 세수익 총액

회계연도별 2016 법안 B 획득 소득		
	2024 회계연	개시 이후 합계 (2017 회계연도 - 2024 회계연도)
획득 수익	\$266,617,738	\$1,720,045,857
획득 소득	\$33,515,090	\$90,625,191
소계	\$300,132,828	\$1,810,671,048
관리비	-\$2,198,790	-\$12,478,770 ⁽¹⁾
프로그램 세수익 총액	\$297,934,038	\$1,798,192,278

(1) Inception to FY 2024 amount reflects an update made to the prior year accrual allocation, resulting in updated reporting on Administration expenses.

2016 법안 B는 판매세 프로그램을 통해 약 63억 달러(2017년 기준)의 재원이 마련될 것으로 예상했습니다. 각 프로그램 범주에는 프로그램 세수익의 예상 금액이 할당되었습니다. 이 예상 금액을 총 63억 달러로 나누면 각 프로그램 범주에 대한 **프로그램 세수익 비율**이 결정됩니다. 이 비율은 향후 할당액을 계산하고 2016 법안 B 기금의 적절한 배분을 결정하는 데 사용됩니다.

2.2 프로그램 범주

2016 법안 B 프로그램에는 9개의 프로그램 범주가 있으며, 그중 두 개에는 하위 범주가 포함됩니다. 모든 프로그램 범주는 VTA 이사회에서 승인한 기존 지침에 따라 관리됩니다.

할당

VTA 예산은 2개 회계연도로 구성됩니다. 2024 회계연도와 2025 회계연도에 승인된 예산은 아래 표에 나와 있습니다. 또한, 표 2.2.1에는 할당 유형에 따라 차별화된 프로그램 범주 할당이 나와 있습니다. 2016 법안 B 프로그램 범주 지침은 수식 기반과 필요성/역량 기반이라는 두 가지 자금 배분 유형을 설정합니다. 수식 기반 배분이란 프로그램 범주의 프로그램 세수 비율과 해당 회계연도의 예상 프로그램 세수를 곱하여 각 회계연도마다 자금이 배분되는 것을 의미합니다. 필요성/역량 기반 분배는 프로젝트 할당이 VTA 이사회에서 채택한 프로젝트 준비 기준을 충족하는 프로젝트의 능력에 따라 이루어짐을 의미합니다.

표 2.2.1 - 2016 법안 B 2024 회계연도 및 2025 회계연도 프로그램 범주 할당액

		2024 회계연도	2025 회계연도
행정 비용		\$1,500,000	\$2,000,000
프로그램 범주			
수식 기반	지역 거리 및 도로	\$52,630,000	\$54,710,000
	자전거 및 보행자		
	교육 및 장려	\$1,330,000	\$1,710,000
	자본 프로젝트	\$17,490,000	
	기획 연구	\$1,090,000	
	대중교통 운영		
	핵심 네트워크 강화	\$12,630,000	\$16,640,000
	혁신적인 대중교통 서비스 모델	\$1,750,000	\$1,820,000
	이동성 및 저렴한 요금 확대	\$2,660,000	\$3,420,000
	편의시설 개선	\$1,740,000	
필요성/역량 기반	BART 2단계	\$747,600,000	
	Caltrain 교차 분리	\$107,000,000	
	Caltrain 통로 용량 개선		
	고속도로 교차로	\$71,360,000	
	카운티 간선도로	\$4,300,000	
	주도 85번	\$6,620,000	
	총계	\$1,110,000,000	

다음 표에는 2016 법안 B 프로그램 범주 배분이 투표로 확정된 프로그램 세수 비율과 보고 회계연도 말까지의 프로그램 세수 비율로 강조되어 있습니다.

표 2.2.2 - 2016 법안 B 프로그램 세수의 백분율 지분으로 프로그램 범주 할당액

2016 법안 B 프로그램 세수의 백분율 지분으로 프로그램 범주 할당액				
프로그램 범주		할당 착수 시점까지 2024 회계연도	% 의프로그램 세금 수입 (Ballot Measure Language) ⁽²⁾	%의프로그램 세금 수입착수 시점까지 2024 회계연도
수식 기반	지역 거리 및 도로	\$323,330,000	19.05%	15.05%
	자전거 및 보행자			
	교육 및 장려	\$9,789,643.11	3.97%	4.24%
	자본 프로젝트 ⁽¹⁾	\$62,600,000		
	기획 연구 ⁽¹⁾	\$3,910,000		
	대중교통 운영			
	핵심 네트워크 강화	\$94,800,000	7.94%	8.53%
	혁신적인 대중교통 서비스 모델	\$10,940,000		
	이동성 및 저렴한 요금 확대	\$19,580,000		
	편의시설 개 ⁽¹⁾	no update		
필요성/역량 기반 ⁽¹⁾	BART 2단계	\$897,600,000	23.81%	49.92%
	Caltrain 교차 분리	\$178,000,000	11.11%	9.90%
	Caltrain 통로 용량 개선	\$42,450,000	4.98%	2.36%
	고속도로 교차로	\$436,150,000	11.90%	24.25%
	카운티 간선도로	\$54,300,000	11.90%	3.02%
	주도 85번	\$21,120,000	5.56%	1.17%

⁽¹⁾ 이러한 할당은 격년 예산의 첫 회계연도가 시작될 때 프로그램 범주 또는 하위 범주에 사용할 수 있습니다. 이는 회계연도별로 배분되지 않습니다.

⁽²⁾ 2016 법안 B 투표 법안 내용은 회계 연도별이 아닌 법안의 전체 기간 동안 프로그램 세수 비율을 명시하고 있습니다.

투표 확정 비율은 법안의 30년 수명을 기준으로 하며 회계연도 말에 표시되는 프로그램 범주 배분 비율은 한 시점의 스냅샷이라는 점에 유의하는 것이 중요합니다. 프로그램 범주 배분은 30년 동안 변동되며 이는 회계연도 말에 표시되는 비율에 반영됩니다.

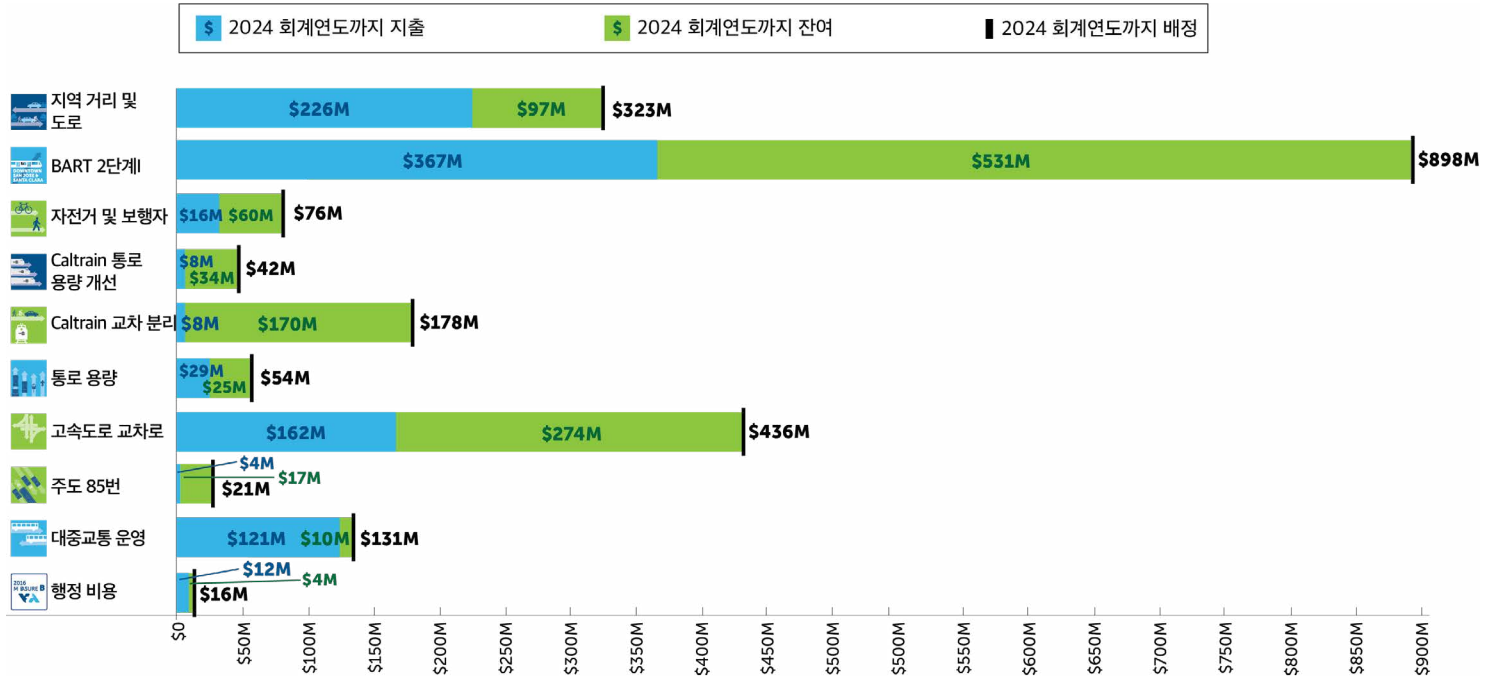
프로그램 범주 지침

9개의 2016 법안 B 프로그램 범주 각각을 관리하기 위해, VTA는 각 프로그램 범주(해당되는 경우 후속 하위 범주), 구현 단계, 프로젝트, 프로그램 기준 및 요구 사항에 대한 자금 분배를 개략적으로 설명하는 지침을 수립했습니다. VTA 이사회는 2017년 가을에 9개 프로그램 범주 지침을 채택했고, 2022년 8월에는 개정된 지침을 채택했습니다. 개정된 지침에는 9개 프로그램 범주의 구현에 영향을 미치는 이사회 승인 조치가 포함되어 있을 뿐만 아니라 일관성과 추가 명확성을 위해 표준화된 내용 및 서식 변경 사항이 포함되었습니다.

프로그램 범주 요약

아래 표는 9개 프로그램 범주 각각의 2024 회계연도까지의 할당액 및 지출을 보여줍니다.

표 2.2.3 - 2016 법안 B 2024 회계연도 프로그램 범주 할당액 및 지출



프로그램 범주 보고서

9개 프로그램 범주 각각의 세부 정보는 아래와 같습니다. 보고서에는 프로그램 범주에 대한 간략한 설명과 할당액 및 지출 요약이 포함되어 있습니다.



지역 거리 및 도로

2024 회계연도 할당: \$52,630,000

2024 회계연도 지출: \$69,307,418

착수 시점까지 할당: \$323,330,345

착수 시점까지 지출: \$225,885,756

지역 거리 및 도로 부문은 거리 시스템의 수리 및 유지 관리에 사용될 기금을 배분합니다. 또한, 각 기관은 완전한 거리(Complete Streets) 모범 사례를 적용하여 모든 거리 시스템 사용자를 위해 요소를 개선해야 합니다. 기금은 투표용지에 명시된 인구 기반 공식에 따라 계산됩니다. 기금은 VTA 2년 예산 절차와 연계하여 2년 주기로 배정되지만, 매년 지급되어 기관에서 사용할 수 있습니다.

시 또는 카운티의 포장 상태 지수(PCI) 점수가 70점 이상인 경우, VTA가 승인한 교통 체증 완화 프로젝트에 할당된 금액을 사용할 수 있습니다. VTA는 PCI를 산정하기 위해 대도시 교통 위원회(Metropolitan Transportation Commission)의 지수를 사용합니다. 이 지수는 도로 포장 상태의 스냅샷을 제공하며, 점수가 높을수록 상태가 양호함을 의미합니다. 포장 관리 보존 프로그램은 도로의 장기적인 훼손을 방지하여 장기적인 유지 관리 비용을 절감하는 데 도움이 됩니다.

포장도로 유지 관리를 위해 수행되는 일반적인 작업에는 슬러리 실링, 균열 보수, 연석 블록 설치, 차선 개선, 녹지 제거 및 재식재, 그리고 완전한 거리 개선이 포함됩니다. 교통 체증 완화 프로젝트는 각 기관의 구체적인 필요에 따라 다양하며, 사람들의 이동을 효과적이고 효율적으로 하는 데 우선순위를 둡니다. 이 프로그램 범주의 성과는 매년 평가됩니다.

2024 회계연도 프로그램 활동의 주요 내용으로는 카운티 전역의 659.1차선 마일(약 1,000km)의 포장도로 개선이 포함되었습니다.



Labor Drive, before - City of San Jose



Labor Drive, after - City of San Jose



Chesbro Avenue, before - City of San Jose



Chesbro Avenue, after - City of San Jose



자전거 및 보행자

2024 회계연도 할당: \$19,910,000
2024 회계연도 지출: \$10,167,082

착수 시점까지 할당: \$78,010,000
착수 시점까지 지출: \$16,041,119

이 범주는 시, 카운티, 그리고 VTA가 지정한 카운티 전체에 중요한 자전거 및 보행자 프로젝트에 자금을 지원합니다. 이 자금은 학교, 대중교통, 고용 센터와의 연결, 기존 자전거 및 보행자 네트워크의 격차 해소, 이동 장애물을 안전하게 건너는 것, 모든 카운티 주민과 방문객에게 도보 또는 자전거를 더 안전하고 편리한 교통 수단으로 만드는 프로젝트에 우선순위를 두게 됩니다. 적격 프로젝트는 2016 법안 B의 첨부 A에 명시되어 있습니다. (부록 6.1 참조)

이 프로그램 범주는 세 가지 하위 범주로 구성됩니다. 아래에 설명된 교육 및 장려, 자본 프로젝트, 그리고 기획 연구입니다.



Vision Zero Bus Wrap - VTA

• 하위 범주 보조금 프로그램: 교육 및 장려

- 이 프로그램을 통해 회원 기관은 자전거 타기 및 걷기 사용을 장려하거나 이러한 수단에 관한 교육을 제공하는 프로젝트 및 프로그램에 자금을 지원할 수 있습니다. 여기에는 안전한 통학 경로, 걷기 감사, 거리 공개 행사, 자전거/보행자 안전 캠페인 등이 포함되지만 이에 국한되지는 않습니다. 이 프로그램의 자금은 인구 기반 수식을 통해 각 회원 기관에 배분됩니다.
- 2024 회계연도 주요 프로그램 활동은 다음과 같습니다.
 - 15개 이상의 학교 및 비학교 기반 기술 및 안전 교육 프로그램 운영
 - VTA가 산타클라라 카운티 공중보건국과 협력하여 주최한 성공적인 비전 제로 캠페인
 - 10개 이상의 거리 개방 행사 지원



Bike to Wherever Day - City of Gilroy

• 하위 범주 보조금 프로그램: 자본 프로젝트

- 이 경쟁 보조금 프로그램은 다음을 포함하거나 그에 이르는 활동에 대해 신청자에게 자금을 지원합니다. 자전거 및 보행자 프로젝트에 대한 환경 승인, 설계, 통행권 그리고 건설로, 현재 2016 법안 B에 명시되어 있습니다.
- 2024 회계연도 주요 프로그램 활동은 다음과 같습니다.
 - 3건의 자금 지원 계약 체결: 마운틴 뷰의 스티븐스 크릭 웨스트 레밍턴 확장 프로젝트, 산호세의 코요테 크릭 트레일 완공 및 과달루페 강 트레일 알마덴 확장 프로젝트

• 하위 범주 보조금 프로그램: 기획 연구

- 이 경쟁 보조금 프로그램을 통해서 도시, 카운티, VTA는 전국적으로 중요한 자전거 및 보행자 프로젝트의 자본 프로젝트 개발을 지원하는 계획 연구를 진행할 수 있도록 자금을 신청할 수 있게 합니다.
- 2024 회계연도 주요 활동은 다음과 같은 3건의 자금 지원 계약 체결을 포함했습니다. 마운틴 뷰의 미라몬테 애비뉴 자전거 도로 연구, 캠벨의 해밀턴 애비뉴/17번 고속도로 연구, 산타클라라 카운티의 풋힐 고속도로 연구.



BART 2단계

2024 회계연도 할당: \$747,600,000
2024 회계연도 지출: \$320,516,282

착수 시점까지 할당: \$897,600,000
착수 시점까지 지출: \$366,886,367

BART 실리콘 밸리 2단계(BART 2단계) 프로그램 범주는 산호세 베리에서 역에서 산타클라라 시까지 6마일 연장되는 지역 BART 시스템인 BART 2단계의 계획, 엔지니어링, 건설 및 납품 비용에 자금을 지원합니다.

2016 회계연도에 2024 법안 B에 의해 자금이 지원된 주요 활동으로는 터널 및 선로 프로그레시브 설계 구축 계약(CP2) 설계 활동, 부동산 취득, 건설 패키지 설계 노력, 비용/일정 위험 평가 준비를 위한 연방 교통국과의 협력, 터널 굴착기 및 BART 철도 차량 조달 프로세스 개시 등이 있습니다.



Caltrain 통로 용량

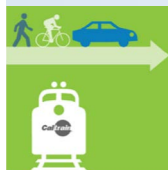
2024 회계연도 할당: \$0
2024 회계연도 지출: \$3,062,866

착수 시점까지 할당: \$42,250,000
착수 시점까지 지출: \$8,108,613

Caltrain 통로 용량 개선 범주는 고속도로 정체 완화를 위해 산타클라라 카운티의 Caltrain 서비스를 개선하고 늘리는 데 도움이 됩니다. 이 범주는 필요성/역량 기반 프로그램 유형이며, 자금 지원을 받으려면 이사회에서 승인한 프로젝트 준비 기준을 준수해야 합니다.

VTA는 산타클라라 카운티의 Caltrain 통로에 도움이 되는 프로젝트를 수행하기 위해 Caltrain 과 협력하고 있습니다. 이 프로그램 범주에서 지원하는 프로젝트 유형에는 모건 힐과 길로이행 서비스 증설, 역 개선, 평상형 승강장, 플랫폼 확장, 서비스 향상 등이 있습니다.

2024 회계연도 프로그램 활동 성과로는 통로 횡단 전략 계획, 전기 다중 유닛 하이브리드화 연구, 그리고 디리돈 사업 사례 프로젝트 관리 지원 및 전략 자문 서비스 프로젝트 등 3가지 자금 지원 계약이 포함되었습니다.



Caltrain 입체 분리

2024 회계연도 할당: \$107,000,000
2024 회계연도 지출: \$7,450,494

착수 시점까지 할당: \$178,000,000
착수 시점까지 지출: \$8,230,561

Caltrain 입체 분리 범주는 서니베일, 마운틴 뷰, 팔로알토 시의 Caltrain 통로를 따라 진행되는 입체 분리 프로젝트에 자금을 지원합니다. 이 프로젝트는 Caltrain 선로와 도로를 분리하여 운전자, 자전거 이용자, 보행자의 안전을 강화하는 동시에 교차로의 혼잡을 완화합니다.

2024 회계연도 주요 프로그램 활동으로는 Palo Alto의 추가 기술 연구 기금 계약 체결, 렉스토프 애비뉴 기금 계약 개정안 마련(CM/GC 서비스 포함) 등이 있습니다.



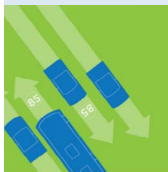
카운티 간선도로

2024 회계연도 할당: \$4,300,000
2024 회계연도 지출: \$2,837,077

착수 시점까지 할당: \$54,300,000
착수 시점까지 지출: \$29,390,222

이 범주는 카운티 간선도로 계획의 1단계 개선 프로젝트에 자금을 지원하여 혼잡을 완화하고 안전을 개선하며 카운티 간선도로 시스템의 효율성을 높이게 됩니다. 적격 프로젝트는 2016 법안 B의 첨부 C에 명시되어 있습니다. (부록 6.1 참조).

2024 회계연도의 주목할 만한 프로그램 활동으로는 카운티 간선도로 프로그램 지원의 진행 상황이 있습니다. 예를 들어, 몬태규 간선도로에 대한 교통량 예측 및 교통 공학 부분 완료 등이 있습니다. 또한, 배터리 백업 장치 업그레이드 1단계 및 2단계 사업이 계약을 체결하고 공사에 착수했습니다.



SR 85 통로

2024 회계연도 할당: \$6,620,000
2024 회계연도 지출: \$646,173

착수 시점까지 할당: \$21,120,000
착수 시점까지 지출: \$4,210,352

이 범주에서는 산호세의 SR 87부터 마운틴뷰의 U.S. 101까지 새로운 대중교통 차선을 포함한 SR 85의 새로운 대중교통 및 혼잡 완화 프로젝트에 자금을 지원합니다. 또한 이 범주는 SR 85에서의 소음 저감을 지원하며, 역과 진입로와 같은 인프라를 갖춘 버스 고속 교통(Bus Rapid Transit), 경전철 교통(Light Rail Transit), 그리고 기타 미래의 교통 기술을 포함하지만 이에 국한되지 않는 교통 대안에 대한 연구 자금을 제공할 것입니다.

2024 회계연도의 SR 85 소음 저감 프로그램 주요 활동은 다음과 같습니다. 즉, Caltrans가 프로젝트 보고서를 승인하여 프로젝트 승인 및 환경 설계(PA/ED) 단계를 완료했고, 최종 설계 단계는 2025년 8월에 완료될 예정이며, 2단계 건설은 2025년 여름에 시작될 예정입니다.



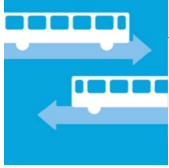
고속도로 교차로

2024 회계연도 할당: \$71,360,000
2024 회계연도 지출: \$31,037,675

착수 시점까지 할당: \$436,150,000
착수 시점까지 지출: \$162,447,985

이 범주는 산타클라라 카운티 전역의 고속도로 프로젝트에 자금을 지원하여 혼잡 완화, 고속도로 운영 및 진입로 개선, 도로 연결 고가교, 지능형 교통 시스템(ITS)을 통한 첨단 기술 배치 등을 제공합니다.

2024 회계연도의 주요 프로그램 활동으로는 US 101/SR 25 1단계 교차로 프로젝트의 최종 설계 및 토지 사용권 확보 단계 완료와 Caltrans의 최종 설계 승인이 있었습니다. 또한, US 101/SR 25 산타 테레사 대로 확장 프로젝트의 PA/ED 단계를 위해 승인된 연방 특별 배정 기금 240만 달러가 집행되었습니다.



대중교통 운영

2024 회계연도 할당: \$17,870,000
2024 회계연도 지출: \$20,003,285

착수 시점까지 할당: \$153,440,000
착수 시점까지 지출: \$121,019,819

이 범주의 목표는 승객 수를 늘리고, 효율성을 개선하고, 노인과 장애인을 위한 이동 서비스를 강화하고, 카운티 내 서비스가 부족하고 취약한 인구의 경제성을 향상시키는 것입니다. 기금은 핵심 버스 노선 서비스 빈도를 유지 및 확대하고, 이른 아침, 저녁, 주말까지 운행 시간을 연장하여 중요한 교통 이동 수요를 위해 버스 서비스에 의존하는 주민의 이동성, 안전한 접근성, 경제성을 개선하는 데 사용할 수 있으며, 특히 카운티 전체의 취약하고 소외된 대중교통 의존 인구를 위해 사용할 수 있습니다. 적격 대중교통 운영 활동에 대한 하위 범주는 2016 법안 B의 첨부 D에 명시되어 있습니다. (부록 6.1 참조)

이 프로그램 범주는 4가지 하위 범주로 구성됩니다. 이동성 확대 및 저렴한 요금, 혁신적인 대중교통 서비스 모델, 편의시설 개선, 그리고 핵심 네트워크의 빈번한 운행 강화이고, 이는 아래에 설명되어 있습니다.

- **하위 범주 프로그램: 이동성 및 저렴한 요금 확대**
 - 이 프로그램은 취약 계층을 위한 이동성 서비스 확대를 위한 기금을 제공합니다.
 - 주요 하위 범주의 주요 내용은 2024 회계연도에 15,143개의 지역사회 요금 패스가 판매되었다는 것입니다.
- **하위 범주 보조금 프로그램: 혁신적인 대중교통 서비스 모델**
 - 이 경쟁적 보조금 프로그램은 첫 번째/마지막 마일 연결 문제를 해결하기 위한 저렴하고 새로운 혁신적인 대중교통 서비스 모델을 지원하는 데 기금을 제공합니다.
 - 2024 회계연도의 주요 활동에는 선정된 5개 프로그램에 대한 지속적인 지원이 포함됩니다.
- **하위 범주 프로그램: 편의시설 개선**
 - 이 하위 범주의 기금은 VTA 버스 정류장의 편의 시설을 개선하여 안전, 보안 및 접근성을 높이고 지속적인 유지 관리를 수행합니다.
 - 2024 회계연도의 주요 활동으로는 새로운 버스 정류장 2개, 새로운 버스 벤치 2개, 새로운 조명 시스템 3개, 그리고 ADA 보도 개선 3개가 포함됩니다.
- **하위 범주 프로그램: 빈번한 핵심 네트워크 강화**
 - 이 하위 범주는 VTA의 핵심 버스 서비스 네트워크에 직접 자금을 지원하여 핵심 버스 노선 서비스 빈도를 늘려서 저녁, 심야 및 주말 서비스를 확장하거나 추가합니다.



Bus Shelter - VTA

3. 감독 및 책임

3.1 2016 법안 B 시민감독위원회

2016 법안 B 투표 법안에는 독립적인 시민감독위원회의 구성이 명시되어 있으며, 그 목적은 2016 법안 B 기금이 승인된 프로그램에 따라 지출되도록 하고 유권자에게 프로그램 준수 여부를 알리는 것입니다. 이를 바탕으로 2016 법안 B 시민감독위원회(MBCOC)가 설립되었습니다. MBCOC는 특정 전문 분야의 8개 위원으로 구성됩니다. 임명은 경쟁적이며 VTA 이사회가 결정합니다. 위원은 필요한 관련 경험과 전문성을 바탕으로 임명됩니다.

MBCOC의 투표용지에 명시된 의무 중 하나는 위원회가 매년 독립적인 감사인이 수행하는 감사를 조직하여 수입의 수령 및 자금 지출을 검토하도록 요구하는 것입니다. 2020년 5월 이후 선정된 독립 감사 기관은 Moss Adams LLC입니다. Moss Adams는 2024 회계연도 감사를 완료했습니다. 이들은 각각에 대해 부적격 또는 '적합' 의견을 제시했고, 이는 전문적 의견에 따르면 VTA가 모든 중요한 측면에서 2016 법안 B 프로그램에 적용되는 요건을 준수했다는 의미입니다. 2016 법안 B 프로그램에 대한 모든 독립 감사는 처음부터 적격 의견을 받았습니다.

MBCOC에 대한 추가 정보는 부록 6.2 또는 vta.org/2016-measure-b-citizens-oversight-committee에서 확인할 수 있으며, 여기에는 위원회 출범 이후 모든 프로그램 성과 감사 및 MBCOC 연례 보고서가 포함되어 있습니다.

3.2 프로그램 투명성

2016 법안 B 프로그램 사무국은 프로그램 활동에 대한 정보를 대중에게 제공하기 위해 정기적으로 업데이트된 정보를 제공합니다. 이 정보는 온라인 및 VTA 자문위원회 및 상임위원회 회의 발표 자료에서 확인할 수 있습니다. 프로그램 사무국은 프로그램의 감사 및 미감사 재무 정보를 제공하는 투명성 웹사이트를 운영하고 있습니다. 추가 프로젝트 정보 및 보고서도 이 웹사이트에서 확인할 수 있습니다.

투명성 웹사이트는 2016measureb.vta.org에서 확인할 수 있습니다.

4. 시행 지침

4.1 10개년 프로그램 및 격년 예산 원칙

2021년 4월, VTA 이사회(VTA BOD)는 2016 법안 B 10년 프로그램 및 격년 예산 원칙(이하, '원칙')을 승인했습니다. 이 원칙은 모든 2016 법안 B 프로그램 범주에 적용되며 격년 예산 및 10개년 프로그램 개발을 안내합니다. 채택된 10년 프로그램 및 격년 예산 원칙은 부록에 나와 있습니다.

10년 프로그램은 10년 동안 프로그램 및 프로젝트의 필요성을 고려한 계획 문서입니다. 10개년 프로그램은 2024~2025 회계연도 격년 예산과 연계하여 업데이트되었으며, 이는 해당 조치에 따른 예상 필요성에 대한 보다 정확한 예측을 제공하기 위한 것입니다. 현재 10년 프로그램은 부록에서 확인할 수 있습니다.

4.2 프로젝트 준비 기준 및 우선순위 지정 방법론

원칙 승인 후, VTA 이사회는 필요성/역량 기반 프로그램 범주에 대한 프로젝트 준비 기준을 승인했습니다. 6개의 필요성/역량 기반 프로그램 범주 프로젝트는 격년 예산 또는 10개년 프로그램에 포함되기 위해 3가지 프로젝트 준비 기준을 충족해야 합니다.

후보 프로젝트가 진행되고 3가지 프로젝트 준비 기준을 모두 충족하면 프로젝트 후원자는 격년 예산 및/또는 10개년 프로그램에 포함되도록 2016 법안 B 프로그램 사무국에 요청을 제출합니다. 승인된 프로젝트 준비 기준은 부록 6.4에서 확인할 수 있습니다.

5. 용어

다음은 이 보고서 및 관련 2016 법안 B 문서에서 자주 사용되는 용어입니다.

배분은 특정 프로젝트 또는 프로그램에 사용할 수 있는 2016 법안 B 자금 중 VTA 위원회가 승인한 금액입니다.

보조금 수혜는 VTA와 수혜자가 적격 프로젝트에 자금을 지원하기로 합의했음을 보여줍니다.

지출은 VTA가 수혜자(예: 시, 카운티 또는 Caltrain)에게 2016 법안 B 자금을 상환하는 것입니다.

회계연도는 7월 1일에 시작하여 6월 30일에 끝나는 12개월의 회계 기간을 의미합니다. 회계 연도는 흔히 **FY**로 축약되며 참조 연도는 해당 기간의 끝입니다. 예를 들어, 2021 회계연도는 2020년 7월 1일부터 2021년 6월 30일까지입니다.

수혜자는 프로젝트를 위해 2016 법안 B 자금을 받는 기관입니다. 여기에는 카운티 내 15개 도시, 산타클라라 카운티, Caltrain 및 VTA가 포함됩니다.

회원 기관은 산타클라라 카운티 교통 혼잡 관리 기관의 공동 권한 협약에 서명한 지방 자치 단체입니다. 여기에는 카운티 내의 모든 시, 산타클라라 카운티 및 VTA가 포함됩니다.

2016 법안 B 투표 용지에는 다음과 같이 **9개의 프로그램** 범주가 명시되어 있으며, 각 범주에 대한 배분액이 명시되어 있습니다. 지역 거리 및 도로, BART 실리콘 밸리 2단계, 자전거 및 보행자, Caltrain 등급 분리, Caltrain 용량 개선, 고속도로 교차로, 카운티 간선도로, 주도 85번 회랑 및 대중교통 운영.

프로그램 세수는 30년 세금 기간 동안 수령한 세수로서, 여기에 발생한 이자나 기타 수익을 포함하고, 부채 서비스의 만족, 차입 비용, 프로그램 관리 및 감독 비용(예: 보조금 관리 및 재무 관리 비용)에 필요한 자금을 제외한 금액입니다. 징수된 **수익**은 이자 수익을 제외한 2016 법안 B 판매세 수익의 순 수령액입니다.

6. 부록

부록6.1 - 2016 법안 B 투표 용지

<p style="text-align: center;">MEASURE B</p> <p style="text-align: center;">COUNTY COUNSEL'S IMPARTIAL ANALYSIS OF MEASURE B</p>	<p style="text-align: center;">COMPLETE TEXT OF MEASURE B</p>
<p>California law permits the Santa Clara Valley Transportation Authority (VTA) to impose a retail transactions and use tax (commonly called a "sales tax") in the territory of the VTA, which includes both the unincorporated territory and all the cities within Santa Clara County. Such a tax must first be approved by two-thirds of the voters voting in an election.</p> <p>Measure B was placed on the Ballot by the VTA Board of Directors (Board). Measure B proposes enactment of a .5% (one-half cent) sales tax. The Board anticipates that the sales tax would be operative on April 1, 2017. The authority to levy the sales tax will expire thirty years later.</p> <p>Under California law, all local governments within each county cannot enact a total sales tax rate of more than 2% in any territory. Approval of this Measure would result in the territory within the cities of Campbell and San Jose reaching that 2% cap during 2017 and until the expiration of an existing tax. The State also imposes a sales tax, some of which is distributed to local governments. The State sales tax rate is scheduled to be 7.25% as of January 1, 2017. Approval of this Measure is anticipated to result in a total 9.25% sales tax in the cities of Campbell and San Jose, and a 9.0% sales tax elsewhere in Santa Clara County, as of the date the sales tax is anticipated to begin. Because existing sales taxes may expire, or other sales taxes may be enacted, overall tax rates may vary during the thirty-year period of this tax.</p> <p>State law requires the VTA to state the specific purposes for which the sales tax proceeds will be used, and the VTA must spend the proceeds of the tax only for these purposes. The stated purposes of the proposed sales tax are to: repair potholes and fix local streets; finish the BART extension through downtown San Jose and to Santa Clara; improve bicycle and pedestrian safety; increase Caltrain capacity, in order to ease highway congestion, and improve safety at crossings; relieve traffic on the expressways and key highway interchanges; and enhance transit for seniors, students, low-income, and disabled individuals. The Measure states that the VTA will establish a program and develop program guidelines to administer tax revenues received from the measure.</p> <p>Measure B provides for the establishment of an independent citizens' oversight committee for ensuring that proceeds of the tax are expended consistent with the program established by the VTA. The committee would hold public hearings, issue reports on at least an annual basis, and arrange for an annual independent audit of expenditures.</p> <p>A "yes" vote is a vote to authorize a special sales tax of one-half cent (.5%) operative for 30 years, expected to expire on March 31, 2047.</p> <p>A "no" vote is a vote not to authorize the special sales tax.</p> <p>James R. Williams Acting County Counsel</p> <p>By: /s/ Danielle L. Goldstein Deputy County Counsel</p>	<p>To repair potholes and fix local streets; finish the BART extension through downtown San Jose and to Santa Clara; improve bicycle and pedestrian safety; increase Caltrain capacity, in order to ease highway congestion, and improve safety at crossings; relieve traffic on the expressways and key highway interchanges; and enhance transit for seniors, students, low-income, and disabled, shall the Board of Directors of the Santa Clara Valley Transportation Authority (VTA) enact a retail transactions and use tax ordinance, Ordinance No. 2016.01, imposing (a) a tax for the privilege of selling tangible personal property at retail upon every retailer in Santa Clara County, the territory of VTA, such tax to be at the rate of one-half of one percent of the gross receipts of the retailer from the sale of tangible personal property sold by him/her at retail in the territory of VTA; and (b) a complementary tax upon the storage, use, or other consumption in Santa Clara County, the territory of VTA, such tax to be at the rate of one-half of one percent of the sales price of the property whose storage, use, or other consumption is subject to the tax; collection of such tax to be limited to thirty years?</p> <p>VTA shall be the administrator of the tax, shall establish a program and develop program guidelines to administer the tax revenues received from the enactment of this measure (the "Program"). Tax revenues received for the 30-year life of the tax, including any interest or other earnings thereon, less any funds necessary for satisfaction of debt service and/or cost of borrowing and costs of program administration and oversight, such as costs of grant administration and financial management, shall be referred to herein as "Program Tax Revenues."</p> <p>VTA shall allocate the Program Tax Revenues to the following categories of transportation projects: Local Streets and Roads; BART Phase II; Bicycle and Pedestrian; Caltrain Grade Separation; Caltrain Capacity Improvements; Highway Interchanges; County Expressways; SR 85 Corridor; and Transit Operations.</p> <p>The present value (i.e., present day purchasing power) of the Program Tax Revenues, as of April 2017, is forecasted to be approximately \$6.3 Billion. The actual revenues to be received over the 30-year life of the tax will be affected by various economic factors, such as inflation and economic growth or decline. The estimated amounts for each category reflect the allocation of approximately \$6.3 Billion. The estimated amounts for each category, divided by \$6.3 Billion, establishes ratios for the allocation among the categories. The VTA Board of Directors may modify those allocation amounts following the program amendment process outlined in this resolution.</p> <ul style="list-style-type: none"> • <u>Local Streets and Roads—Estimated at \$1.2 Billion of the Program Tax Revenues in 2017 dollars.</u> <p>To be returned to cities and the County on a formula basis to be used to repair and maintain the street system. The allocation would be based on the population of the cities and the County of Santa Clara's road and expressway lane mileage. Cities and the County will be required to demonstrate that these funds would be used to enhance and not replace their current investments for road system maintenance and repair. The program would also require that cities and the County apply Complete Streets best practices in order to improve bicycle and pedestrian elements of the street system. If a city or the County has a Pavement Condition Index score of at least 70, it may use the funds for other congestion relief projects.</p>

COMPLETE TEXT OF MEASURE B-Continued

- **BART Phase II—Estimated at \$1.5 Billion of Program Tax Revenues in 2017 dollars (capped at a maximum of 25% of Program Tax Revenues).**

To fund the planning, engineering, construction, and delivery costs of BART Phase II, which will create a new regional rail connection by extending BART from the Berryessa Station in San Jose to Santa Clara with stations at Alum Rock/28th Street, downtown San Jose, San Jose Diridon Station, and Santa Clara.

- **Bicycle/Pedestrian—Estimated at \$250 Million of Program Tax Revenues in 2017 dollars.**

To fund bicycle and pedestrian projects of countywide significance identified by the cities, County, and VTA. The program will give priority to those projects that connect to schools, transit, and employment centers; fill gaps in the existing bike and pedestrian network; safely cross barriers to mobility; and make walking or biking a safer and more convenient means of transportation for all county residents and visitors. Bicycle and pedestrian educational programs, such as Safe Routes to Schools, will be eligible for funding. Candidate Projects are set forth in Attachment A.

- **Caltrain Grade Separation—Estimated at \$700 Million of Program Tax Revenues in 2017 dollars.**

To fund grade separation projects along the Caltrain corridor in the cities of Sunnyvale, Mountain View, and Palo Alto, separating the Caltrain tracks from roadways to provide increased safety benefits for drivers, bicyclists, and pedestrians and also reduce congestion at the intersections.

- **Caltrain Corridor Capacity Improvements—Estimated at \$314 Million of Program Tax Revenues in 2017 dollars.**

To fund Caltrain corridor capacity improvements and increased service in Santa Clara County in order to ease highway congestion, including: increased service to Morgan Hill and Gilroy, station improvements, level boarding, extended platforms, and service enhancements.

- **Highway Interchanges—Estimated at \$750 Million of Program Tax Revenues in 2017 dollars.**

To fund highway projects throughout the valley that will provide congestion relief, improved highway operations and freeway access, noise abatement, roadway connection overcrossings, and deploy advanced technology through Intelligent Transportation Systems (ITS). Candidate Projects are set forth in Attachment B.

- **County Expressways—Estimated at \$750 Million of Program Tax Revenues in 2017 dollars.**

To fund Tier 1 improvement projects in the County's Expressway Plan in order to relieve congestion, improve safety and increase the effectiveness of the expressway system in the county. Candidate Projects are set forth in Attachment C.

- **State Route 85 Corridor—Estimated at \$350 Million of Program Tax Revenues in 2017 dollars.**

To fund new transit and congestion relief projects on SR 85, including a new transit lane from SR 87 in San Jose to U.S. 101 in Mountain View. Additionally this category will fund noise abatement along SR 85 and will provide funding to study transportation alternatives that include, but are not limited to, Bus Rapid Transit with infrastructure

COMPLETE TEXT OF MEASURE B-Continued

such as stations and access ramps, Light Rail Transit, and future transportation technologies that may be applicable.

- **Transit Operations—Estimated at \$500 Million of Program Tax Revenues in 2017 dollars.**

The revenue from this program category will provide additional funds specifically for bus operations to serve vulnerable, underserved, and transit dependent populations throughout the county. The goals of the program category are to increase ridership, improve efficiency, enhance mobility services for seniors and disabled, and improve affordability for the underserved and vulnerable constituencies in the county. As VTA considers modifications to bus operations and routes to improve ridership and efficiencies, these funds may also be utilized to maintain and expand service to the most underserved and vulnerable populations. The funds may be used to increase core bus route service frequencies, extending hours of operations to early mornings, evenings and weekends to improve mobility, safe access and affordability to residents that rely on bus service for critical transportation mobility needs. Attachment D describes the list of Candidate Projects and Programs.

The Program Categories will be administered in accordance with program guidelines and policies to be developed and approved by the VTA Board of Directors.

An independent citizen's oversight committee shall be appointed to ensure that the funds are being expended consistent with the approved Program. Annually, the committee shall have an audit conducted by an independent auditor. The audit shall review the receipt of revenue and expenditure of funds. The committee shall hold public hearings, and issue a report annually to inform the Santa Clara County residents how the funds are being spent. The hearings will be public meetings subject to the Brown Act.

To support and advance the delivery of projects in the Program, VTA may issue or enter into financial obligations secured by the tax revenues received from the State Board of Equalization (SBOE), including but not limited to, bonds, notes, commercial paper, leases, loans and other financial obligations and agreements (collectively, "Financing Obligations"), and may engage in any other transactions allowed by law. Notwithstanding anything to the contrary, to obtain the strongest credit ratings and lowest financing costs, VTA may pledge up to the full amount of tax revenues received from the SBOE as security for any Financing Obligations of the Program and may contract with the SBOE to have pledged amounts transferred directly to a fiduciary, such as a bond trustee, to secure Financing Obligations to fund any project in the Program. Any Financing Obligation shall be fully paid prior to the expiration of this tax measure.

If approved by a 3/4 majority of the VTA Board of Directors, and only after a noticed public meeting in which the County of Santa Clara Board of Supervisors, and the city council of each city in Santa Clara County have been notified at least 30 days prior to the meeting, VTA may modify the Program for any prudent purpose, including to account for the results of any environmental review required under the California Environmental Quality Act of the individual specific projects in the Program; to account for increases or decreases in federal, state, and local funds, including revenues received from this tax measure; to account for unexpected increase or decrease in revenues; to add or delete a project from the Program in order to carry out the overall purpose of the Program; to maintain consistency with the Santa Clara Valley Transportation Plan; to

COMPLETE TEXT OF MEASURE B-Continued

shift funding between project categories; or to take into consideration new innovations or unforeseen circumstances.

ATTACHMENT A ENVISION SILICON VALLEY BICYCLE AND PEDESTRIAN CANDIDATE LIST

Project

Implementation of Santa Clara Countywide Bicycle Plan*
Trails in Expressway Rights-of-Way
Alum Rock Trail
Coyote Creek Trail Completion
Lions Creek Trail
Lower Silver Creek Trail
Miramonte Avenue Bikeways
Fremont Road Pathway
Los Gatos Creek Trail Connector to SR 9
Berryessa Creek Trail
West Llagas Creek Trail
Guadalupe River Trail-Extension to Almaden
Three Creeks Trail East from Guadalupe River to Coyote Creek Trail
Five Wounds Trail from William Street to Mabury Road/Berryessa
Hwy. 237 Bicycle Trail: Great America Parkway to Zanker (Class I, II, and IV)
Lower Guadalupe River Access Ramps
Los Gatos Creek Trail Gap Closure
Calabazas Creek Trail
San Tomas Aquino Trail Extension to South & Campbell Portion
Union Pacific Railroad Trail
Stevens Creek Trail Extension
Hamilton Avenue/Highway 17 Bicycle Overcrossing
Pedestrian/Bicycle Bridge over SR 17 from Railway/Sunnyside to Campbell Technology Parkway
Mary Avenue Complete Streets Conversion
UPRR Bicycle/Pedestrian Bridge Crossing: Stevens Creek Boulevard to Snyder Hammond House/Rancho San Antonio Park
Montague Expressway Bicycle/Pedestrian Overcrossing at Milpitas BART Station
Shoreline/101 Bicycle/Pedestrian Bridge
Mayfield Tunnel Pedestrian/Bicycle under Central Expressway connecting to San Antonio Caltrain Station
South Palo Alto Caltrain Bicycle/Pedestrian Crossing
Matadero Creek Trail Undercrossing
Caltrain Capitol Undercrossing
Phelan Avenue Pedestrian/Bicycle Bridge over Coyote Creek
Newhall Street Bicycle/Pedestrian Overcrossing over Caltrain Tracks
Kiely Bicycle/Pedestrian Overcrossing
Winchester Bicycle/Pedestrian Overcrossing
Bernardo Caltrain Undercrossing
San Tomas Aquino Creek Trail Underpass at 49er Stadium
Latimer Avenue Bicycle/Pedestrian Overcrossing

COMPLETE TEXT OF MEASURE B-Continued

Bicycle/Pedestrian safety education at approximately 200 schools
Implementation of Pedestrian Access to Transit Plan (VTA)*
Bike amenities at transit stops and on transit vehicles
Countywide Vision Zero Program (VTA)*
Highway 9 Pedestrian Safety Improvements

*These plans are currently being developed/updated and projects are being identified.

ATTACHMENT B ENVISION HIGHWAY PROGRAM CANDIDATE LIST

Project

US 101 Improvements in the cities of Palo Alto and Mountain View to address regional connectivity and circulation between San Antonio Road and Charleston Road at the US 101/San Antonio Road, US 101/Rengstorff/Charleston Road and US 101/Shoreline Boulevard interchanges.

SR 85/SR 237 Area Improvements in Mountain View to address mainline congestion and regional connectivity through the SR 85/SR 237 connector, SR 85/El Camino Real interchange, and the SR 237/El Camino/Grant Road interchange.

SR 237/US 101/Mathilda Avenue Area Improvements in Sunnyvale to address local roadway congestion.

SR 237 Corridor Improvements in the cities of San Jose, Santa Clara and Milpitas to address mainline congestion and regional connectivity by addition of SR 237 westbound/eastbound auxiliary lanes between Zanker Road and North First Street, improvements at the SR 237/Great America Parkway westbound off-ramp, and replacement/widening of the Calaveras Boulevard structures over the UPRR tracks.

West County Improvements along I-280 in Cupertino, Los Altos, Los Altos Hills and Sunnyvale to address mainline congestion with mainline and interchange improvements from Magdalena Avenue to the San Mateo County line.

SR 85/I-280 Area Improvements in Cupertino, Los Altos, and Sunnyvale to address regional connectivity through a northbound I-280 braided ramp between SR 85 and Foothill Boulevard and improvements at the northbound I-280 off-ramp to Foothill Boulevard.

US 101/Trimble Road/De La Cruz Boulevard to Zanker Road Area Improvements to address local roadway connectivity and mainline congestion in San Jose and Santa Clara with US 101/Trimble Road/De La Cruz Boulevard interchange improvements, southbound US 101/SB 87 connector improvements, and a new US 101/Zanker Road interchange.

US 101/Old Oakland Road Improvements in San Jose to address local roadway congestion, access and connectivity.

A new interchange at US 101/Mabury Road in San Jose to address regional access.

I-680 Corridor Improvements in San Jose to address mainline congestion and regional connectivity by improving the I-680/Alum Rock Avenue and I-680/McKee Road interchanges.

I-280/Lawrence Expressway/Stevens Creek Boulevard Interchange Improvements to address mainline and local roadway congestion.

COMPLETE TEXT OF MEASURE B-Continued

I-280/Saratoga Avenue Interchange Improvements to address local circulation and mainline congestion.

I-280/Winchester Boulevard Area Improvements in Santa Clara and San Jose to address regional connectivity and local circulation.

SR 87 Corridor Technology-based Improvements in San Jose to address mainline congestion and system reliability through the implementation of technology-based operational improvements to the freeway.

Highway 17 Corridor Congestion Relief: Upgrade Highway 17/9 interchange to improve pedestrian and bicycle safety, mobility, and roadway operations; deploy advanced transportation technology to reduce freeway cut through traffic in Los Gatos, including traffic signal control system upgrades in Los Gatos, Traveler Information System, advanced ramp metering systems; support Multi-Modal Congestion Relief Solutions, including enhanced Highway 17 Express Bus service, implementing local bus system improvements that reduce auto trips to schools, work, and commercial areas in Los Gatos; and develop park and ride lots to serve as transit hubs for express bus, shuttles, local bus system connections.

SR 17 Southbound/Hamilton Avenue Off-ramp Widening Improvements in Campbell to address mainline congestion and local circulation.

SR 17/San Tomas Expressway Improvements in Campbell to address mainline congestion and local circulation.

US 101/Blossom Hill Boulevard Improvements in San Jose to address local roadway congestion and connectivity, including for bicyclists and pedestrians.

US 101 Improvements in Gilroy to address mainline congestion and regional connectivity with a new US 101/Buena Vista Avenue interchange and US 101/SR 152 10th Street ramp and intersection improvements.

SR 152 Corridor Improvements in Gilroy including US 101/SR 25 interchange improvements to address regional connectivity and goods movement network improvements.

I-280/Wolfe Road Interchange Improvements in Cupertino to address mainline congestion and improve local traffic circulation.

I-880/Charcot Avenue Overcrossing in San Jose to address local relief circulation and adjacent I-880 interchanges congestion relief.

Noise Abatement Projects in Santa Clara County to implement treatments to address existing freeway noise levels throughout the county.

Intelligent Transportation Systems (ITS) Projects in Santa Clara County such as integrated corridor management systems, traffic operations systems, ramp metering, managed lanes, and local traffic signal control systems to address freeway mainline congestion and local roadway congestion caused by cut-through traffic.

COMPLETE TEXT OF MEASURE B-Continued

ATTACHMENT C SANTA CLARA COUNTY EXPRESSWAY IMPROVEMENTS (TIER 1)

Project

Almaden Expressway at SR-85-Interim Improvements

Almaden Expressway at Branham Lane Intersection Improvements

Almaden Expressway at Camden Ave Intersection Improvements

Capitol Expressway Widening and Interchange Modifications between I-680 and Capitol Avenue

Central Expressway at Thompson Intersection Improvements

Foothill Expressway Auxiliary Lanes between El Monte and San Antonio

Lawrence Expressway at Homestead Road Interim Improvements

Lawrence Expressway at Homestead Road Grade Separation

Lawrence Expressway from Reed/Monroe to Arques Grade Separation

Montague Expressway Complete 8-lane Widening including HOV lanes and Auxiliary Lanes between Great Mall and McCarthy/O'Toole

Oregon-Page Mill Widening (possible HOV lanes) and Trail between I-280 and Foothill Expressway

Oregon-Page Mill Intersection Improvements between Porter and Hansen

Oregon-Page Mill/El Camino Real Intersection Improvements

San Tomas Expressway Widening and Trail between Homestead and Stevens Creek

Santa Teresa-Hale Corridor Road and Trail between Dewitt and Main

Santa Teresa-Hale Corridor Widening and Trail between Long Meadow and Fitzgerald

SR 17/San Tomas Expressway Interim Improvements

I-280/Foothill Expressway Interchange Modifications and Auxiliary Lane to Homestead

I-280/Oregon-Page Mill Road Interchange Reconfiguration
Expressway ITS/Signal System Countywide

ATTACHMENT D TRANSIT OPERATIONS CANDIDATE PROJECTS AND PROGRAMS LIST

- Expand mobility services and affordable fare programs for seniors, disabled, students and low-income riders.

This project would provide funds to develop and expand senior and disabled transportation mobility programs and services. The proposed program would provide mobility options such as coordinated eligibility services and enhanced mobility options provided in a secure and safe manner for the most vulnerable and underserved residents in the County, such as seniors and persons with disabilities. It would support mobility options including maintaining the paratransit service coverage area and service expansion by extending hours of operation and weekend service. The funds would also establish permanent and augment discount fare programs to increase transit access for low-income, underserved and vulnerable populations unable to afford standard fares.

COMPLETE TEXT OF MEASURE B-Continued

- Enhance Frequent Core Bus Network.

The project would upgrade service frequency on VTA's top core network routes to 15-minutes or faster. Some specific examples include expanding the number of high frequency core routes and expanding the schedule of existing services. This may also include enhancing frequency of services during early mornings, evenings and weekends in order to improve convenience, reliability, connectivity, ridership, farebox recovery and support local land use plans. The upgrade would improve the quality of service for vulnerable, underserved and transit dependent populations as well as existing riders and attract new riders which would decrease vehicle miles traveled, traffic congestion and pollution.

- Improve amenities at bus stops to increase safety, security and access.

The project would provide funds for system wide improvements to bus stops, transit centers and stations including new and replacement shelters, lighting, access improvements including safe sidewalk connections, passenger information signs and security.

- Support new innovative transit service models to address first/last mile connections.

The project would support affordable new innovative transit service models to address first/last mile connections including FLEX type services, dynamic on-demand subscription shuttles and partnerships with other demand responsive service providers serving vulnerable, underserved and transit dependent populations.

ARGUMENT IN FAVOR OF MEASURE B

Uncommon allies united for a common goal: Relieve Traffic; Repair our Roads. That's why the League of Women Voters, San Jose Silicon Valley Chamber of Commerce, League of Conservation Voters, former U.S. Transportation Secretary Norman Mineta and Senator Dianne Feinstein are championing Measure B to provide vital local funding to fill potholes, maintain roads and reduce traffic throughout Santa Clara County.

We are fortunate to enjoy a special quality of life here. Unfortunately, many of Santa Clara County's roads are in dire need of repair and we're spending too much time trapped in traffic. We need meaningful countywide congestion relief.

Measure B will:

- Finish the BART extension to downtown San Jose and Santa Clara
- Relieve traffic congestion on all 10 Expressways (Almaden, Capitol, Central, Foothill, Lawrence, Montague, Page Mill, San Tomas, Santa Teresa, Hale) and key highway interchanges
- Protect and enhance transit options for seniors, the disabled, students and the poor
- Repair roads and fix potholes in all 15 cities
- Improve bicycle and pedestrian safety, especially near schools
- Increase Caltrain capacity, easing highway congestion and improving safety at grade crossings
- Connect BART/Caltrain in downtown San Jose and Santa Clara, with platform-to-platform connections, to finally provide rapid rail around the entire Bay Area

Voting YES on Measure B provides Santa Clara County with a source of locally controlled funding to repair and maintain our roads and improve safety. Measure B helps Santa Clara County secure state and federal matching funds, otherwise lost to other regions.

The state or federal government cannot take away Measure B funds. We need to act now; the longer we wait, the more expensive these improvements become.

Measure B mandates strong taxpayer safeguards, including independent financial audits with citizen oversight. Elected leaders will be held accountable to spend funds as promised.

Measure B repairs our roads and contributes to a better quality of life throughout Santa Clara County. Join us in supporting Measure B.

ARGUMENT IN FAVOR OF MEASURE B-Continued

www.YesMeasureB.com

/s/ Roberta Hollimon
Chair, Council of the Leagues of Women Voters of Santa Clara County

/s/ Matthew Mahood
President & CEO, San Jose Silicon Valley Chamber of Commerce

/s/ Rod Diridon, Sr.
Chair Emeritus, League of Conservation Voters of Santa Clara County

/s/ Michael E. Engh
President, Santa Clara University

/s/ Darryl Von Raesfeld
Fire Chief, City of San Jose (Retired)

REBUTTAL TO ARGUMENT IN FAVOR OF MEASURE B

Has your commute improved since Measure A in 2000? One thing is abundantly clear: If VTA actually could deliver "meaningful countywide congestion relief" they would have done it by now. This is a promise they can't deliver on.

Measure B would add a big increase to an already hefty transportation sales tax. What confidence do you have that you will ever benefit from it?

Look at the performance of Measure A from 2000. VTA's Capital Program Dashboard shows that no Measure A projects have been completed. The most expensive project, BART to Santa Clara, was cut in half. Why trust that Measure B will be any different? Voters deserve to see projects delivered before being asked to pay more taxes!

We've seen all this before: traffic keeps getting worse. The billions spent from existing taxes are not making our lives better. Clearly, the strategy doesn't work. Doing more of the same will continue to produce unacceptable results.

Measure B is a recipe for failure. We need a new direction. For example, voters need to consider whether major employers should pay more to reduce the congestion impacts of their employees' commutes.

Voting NO on Measure B sends a strong message: Find a new direction for our county--one that is good for the environment, good for the economy, and good for our health.

Please vote NO on Measure B. After the "bait and switch" of 2000's Measure A, let's not give VTA a \$6.3 billion blank check.

/s/ Michael J. Ferreira
Executive Committee Chair, Loma Prieta Chapter, Sierra Club

/s/ Mark W.A. Hinkle
President of the Silicon Valley Taxpayers Association

/s/ John M. Inks
Mountain View City Councilmember

/s/ Elizabeth C. Brierly
Santa Clara County Homeowner and Lifelong Resident

ARGUMENT AGAINST MEASURE B

Each year you are stuck in worse congestion. The 1% sales tax you've paid for the past thirty years to "relieve traffic" hasn't worked. Will raising the tax by 44% really "relieve traffic"?

Santa Clara County has tremendously congested roadways and one of the very worst performing light rail systems in the nation. Bus service is unusable and scheduled to get worse.

Population has increased since 2001, while transit ridership has declined 23 percent. If allowed to continue, the whole county will end up in gridlock.

Let's not put even more money into a failed strategy!

Here is the actual list of projects promised by Measure A in 2000, and what happened since then:

- Connect BART to Milpitas, San Jose, Santa Clara (project was cut in half and is still not complete)
- Build rail connection from San Jose Airport to BART, Caltrain, light rail (project canceled)
- New vehicles for disabled access, senior safety, clean air buses (completed)
- New light rail throughout Santa Clara County (one corridor changed into a bus lane project; other corridors canceled)
- Expand, electrify Caltrain (project is delayed more than 15 years)
- Increase rail, bus service (2015 service was 13% below 2001 levels)

The County Civil Grand Jury determined in 2004 that "The VTA Board has proceeded with a transit capital improvement plan that cannot accomplish all that was promised in Measure A." That certainly turned out to be the case.

Why vote for another bait-and-switch?

This election will be close. Your vote can help defeat this tax increase and send a message that new thinking is needed. Air quality and climate change demand new solutions.

For short and long-term traffic relief, please vote No.

Demand a new direction!

ARGUMENT AGAINST MEASURE B-Continued

For more information: www.No2VTMeasureB.org
Twitter: #No2VTMeasureB
Phone: 408-604-0932

/s/ Gladwyn d' Souza
Regional Chair, Loma Prieta Chapter, Sierra Club

/s/ Mark W.A. Hinkle
President: Silicon Valley Taxpayers Association

/s/ John M. Inks
Mountain View City Councilmember

/s/ Andy Chow
President, BayRail Alliance

/s/ Elizabeth C. Brierly
San Jose Homeowner & Lifelong Santa Clara County Resident

REBUTTAL TO ARGUMENT AGAINST MEASURE B

When reading the argument against Measure B, please consider the sources and review the facts for yourself. The opponents offer no solutions to the traffic congestion we face every day.

Some of the organizations signing the argument against Measure B have histories of opposing absolutely everything, including measures to support our schools, parks and public safety.

The text of their argument is even less credible.

Here are the facts:

*The first segment of the BART extension is running \$75 million under budget and a year ahead of schedule, with passenger service beginning in fall 2017.

*Thanks to major investments, electrification of Caltrain will begin in 2020, which helps nearly double ridership capacity from 65,000 daily trips to 110,000.

Why is Measure B important? Please review the official ballot question for yourself. Measure B will accomplish the following while also mandating annual audits by an independent citizens watchdog committee to ensure accountability:

- Repair streets and fix potholes in all 15 cities & towns
- Finish the BART extension to downtown San Jose and Santa Clara
- Improve bicycle/pedestrian safety, especially near schools
- Increase Caltrain capacity, ease highway congestion and improve safety at crossings
- Relieve traffic on all 10 expressways and key highway interchanges
- Enhance transit for seniors, students, low-income citizens and the disabled

All of us are Santa Clara County taxpayers and residents (the signers of the argument against cannot say the same thing). Please join community leaders and organizations

from across Santa Clara County in supporting Measure B for better commutes and better roads.

REBUTTAL TO ARGUMENT AGAINST MEASURE B-Continued

www.YesMeasureB.com

/s/ Yoriko Kishimoto
Friends of Caltrain Chair and Board President of the Midpeninsula
Regional Open Space District

/s/ Glenn M. Grigg
Traffic Engineer, City of Cupertino (Ret.)

/s/ Mark Turner
President/CEO, Gilroy Chamber of Commerce

/s/ Tony Siress
President/CEO Mountain View Chamber of Commerce

/s/ Teresa Alvarado
San Jose Director, SPUR

부록6.2 - 2016 법안 B 시민감독위원회

2016 Measure B 시민 감독 위원회란 “투표 법안에서 권한이 파생된 독립 기관”으로 정의됩니다. 위원회의 임무는 Measure B 자금이 투표와 일치하는 방식으로 사용되는지를 확인 및 보고하는 것입니다. 이 위원회의 기간은 판매세 기간(2017년 4월~2047년 3월)을 반영합니다. 2017년 9월 회의에서 VTA 이사회는 2016 Measure B 시민 감독 위원회에서 업무를 수행할 7명의 개인을 임명했습니다. 멤버십, 회의/일정 및 기타 정보는 [여기](#)여기에서 확인할 수 있습니다. 다음 문서는 2016 Measure B 시민 감독 위원회의 임명 절차에 대한 VTA 이사회의 승인을 보여줍니다.

(see the next few pages for 2016 Measure B Citizens' Oversight Committee documents)



Date: February 23, 2017
 Current Meeting: March 2, 2017
 Board Meeting: March 2, 2017

BOARD MEMORANDUM

TO: Santa Clara Valley Transportation Authority
 Board of Directors

THROUGH: General Manager, Nuria I. Fernandez

FROM: Director of Government & Public Relations, Jim Lawson

SUBJECT: Appointment Process for the 2016 Measure B Citizens' Oversight Committee

APPROVED ACCEPTED ADOPTED AMENDED DEFERRED REVIEWED
 Santa Clara Valley Transportation Authority
 Board of Directors
 Elaine F. Baltao, Board Secretary
 BY: [Signature]
 DATE: 3/2/17

Policy-Related Action: No

Government Code Section 84308 Applies: No

ACTION ITEM

RECOMMENDATION:

Approve the process for appointments to the 2016 Measure B Citizens' Oversight Committee.

BACKGROUND:

On November 8, 2016 the voters of Santa Clara County overwhelmingly approved Measure B that enacted a thirty year ½ cent sales tax for transit and transportation improvements. Nine categories of projects and programs were proposed as part of the measure:

- Local Streets & Roads Repair
- BART Phase II
- Bicycle & Pedestrian Projects
- Caltrain Grade Separations
- Caltrain Capacity Improvements
- Highway Interchanges
- County Expressways
- SR 85 Corridor
- Transit Operations

The ballot measure specified that the revenues and expenditures would be reviewed by an independent citizens' oversight committee appointed by the Santa Clara Valley Transportation Authority (VTA):

* See Page 3X of 3X for motion approved by the VTA Board of Directors at the March 2, 2017, Regular Meeting.

“An independent citizens’ oversight committee shall be appointed to ensure that the funds are being expended consistent with the approved Program. Annually, the committee shall have an audit conducted by an independent auditor. The audit shall review the receipt of revenue and expenditure of funds. The committee shall hold public hearings, and issue a report annually to inform the Santa Clara County residents how the funds are being spent. The hearings will be public meetings subject to the Brown Act.”

DISCUSSION:

With the passage of the ballot measure, it is necessary to appoint a Citizens’ Oversight Committee. Staff reviewed the appointment process of several California jurisdictions having similar ballot measures with some form of oversight. The current VTA experience with our 2000 Measure A Citizens Watchdog Committee also helped form the recommendations.

The recommendation is the formation of an independent committee consisting of seven (7) members who are registered voters in Santa Clara County. There will be an open application process with the intent to allow qualified citizens the opportunity to participate.

In the application process we will actively seek individuals who bring important relevant experience to the committee. Staff recommends that the committee should consist of persons who fulfill the following criteria:

- A retired federal or state judge or administrative law judge or an individual with experience as a mediator or arbitrator.
- A professional from the field of municipal/public finance with a minimum of four years relevant experience.
- A professional with a minimum of four years of experience in management and administration of financial policies, performance measurement and reviews.
- A professional with demonstrated experience of four years or more in the management of large scale construction projects.
- A regional community or business organization representative with at least one year of decision making experience.
- A professional with four years of experience in organized labor.
- A professional with a minimum of four years of experience in educational administration at the high school or college level.

The intent is to have one member representing each of the specified areas of expertise. If after a good faith effort, this is not achieved then no more than two members from one of the other areas of expertise may be selected.

This should provide a range of expertise to assist the committee in its task of evaluating the revenues and project expenditures as we begin implementing the commitments to the voters in 2016 Measure B.

The committee will be staffed by the Auditor General to assure the relevant level of expertise and professional advice.

To assure independence, no elected officials, employees of VTA or appointees to VTA committees are eligible while they hold those positions or appointments. Further, employees of the County of Santa Clara or the cities within Santa Clara will also be ineligible. Since 2016 Measure B was structured to assist the County and the cities in the delivery of their projects, their appointment would not be in keeping with the spirit of independence that the measure calls for.

The members of the committee will be subject to VTA's Conflict of Interest policies. Members are prohibited from acting in any commercial activity directly or indirectly involving VTA, such as being a consultant to VTA or to any party with pending legal actions against VTA during their tenure. Members shall not have direct commercial interest or employment with any public or private entity which receives sales tax funds authorized by this Measure.

Each committee member shall serve for a term of four years except initial appointments will be staggered to assure continuity. Members will be limited to two consecutive terms.

Attachment A describes the committee role and responsibilities along with the appointment process and the high level approach to the projected meetings.

ALTERNATIVES:

In order to meet the intention of 2016 Measure B an oversight committee must be appointed. The Board may direct a different method for selecting the committee or change any of the requirements or restrictions the Board desires.

FISCAL IMPACT:

There is no fiscal impact with approving this appointment process.

STANDING COMMITTEE DISCUSSION/RECOMMENDATION:

The Governance & Audit Committee considered this item at its February 2, 2017 meeting as part of its Regular Agenda.

Committee members expressed strong support for the staff proposal, commenting that it was well thought out. Committee members requested the inclusion of the following items in the appointment or committee administration processes: 1) an aspirational goal of balancing, where feasible, appointments to balance the geographic regions of the county; and 2) offer committee members training on bond oversight and other relevant topics.

The committee unanimously recommended Board approval of the staff recommendation with inclusion of the minor additions indicated and that this item be placed on the Board's Consent Agenda.

Prepared by: Jim Lawson, Director of Public Affairs & Executive Policy Advisor
Memo No. 5992

ATTACHMENTS:

- A--2016 Measure B COC Appointment Process Overview (PDF)

6.2. Appointment Process for the 2016 Measure B Citizens' Oversight Committee

M/S/C (Chavez/Liccardo) to approve, as amended the process for appointments to the 2016 Measure B Citizens' Oversight Committee. Further: 1) add the aspirational goal of geographic representation across Santa Clara County; 2) split the regional community and business organization categories, making the total number of committee membership to eight (8); and 3) provide bond oversight and other relevant training to members.

이사회 승인

VTA 이사회는 2017년 10월 5일 및 11월 2일 회의에서 모든 9개 프로그램에 대한 2016 Measure B 프로그램 범주 가이드라인을 승인했으며, 이는 2017년 1월부터 개발이 시작된 절차였습니다.

프로그램 범주 유형 및 하위 범위 배정

이 가이드라인은 각 9개 프로그램(수식 기반, 프로젝트 기반 또는 경쟁)에 대한 프로그램 유형을 정의하며 이사회 승인을 위한 프로그램 하위 범주에 대한 가이드라인 및 배포를 제시합니다. 예를 들어, 자전거 및 보행자 프로그램 범주의 경우 하위 범주는 자금 분배와 함께 설명되며, 교육 및 장려는 최대 15%, 프로젝트 계획은 최대 5%, 자본 프로젝트는 최소 80%입니다.

(2016 Measure B 프로그램 범주 가이드라인 문서는 다음 페이지 참조)

2016 Measure B Local Streets & Roads Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

To be returned to the cities and the County on a formula basis to be used to repair and maintain the street system. The allocation would be based on the population of the cities and the County of Santa Clara's road and expressway lane mileage. Cities and the County will be required to demonstrate that these funds would be used to enhance and not replace their current investments for road system maintenance and repair. The program would also require that cities and the County apply Compete Streets best practices in order to improve bicycle and pedestrian elements of the street system. If a city or the County has a Pavement Condition Index score of at least 70, it may use the funds for other congestion relief projects.

Total Funding

19.05% of Program Tax Revenues

Program Type

- Formula-based program

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- Funds are allocated on an annual basis, based on the application of the ballot-established ratio to the estimated Program Tax Revenue. The allocations are calculated in two steps:
 1. Multiplying the ballot-established ratio by the projected Program Tax Revenues for that fiscal year.
 2. Reconciling prior allocations, which were based on estimated Program Tax Revenues, with actual Program Tax Revenues (referred to as a "true-up process"). This true-up process will occur in the first fiscal year of each biennial budget cycle.
- Allocations to Cities and County (Agencies) are calculated by formula as stated in the 2016 Measure B ballot language.
- The 2016 Measure B Program Office will notify agency of allocation for two-year cycle.
- Agencies received a one-time advance per the master agreements, with subsequent funds available on a reimbursement basis.

Implementation

- VTA and individual agencies will enter into master funding agreements.
- Agencies are required to submit each fiscal year:
 - Program of projects;
 - Maintenance of Effort certification; and
 - Complete Streets Checklist reporting requirements.

- For agencies with a Pavement Condition Index (PCI) of 70 or higher, the program of projects may also include congestion relief projects and programs.
 - The agency must submit a memo requesting the use of funds for the congestion relief project, describing the project and how it will reduce congestion.
 - The 2016 Measure B Program Office will review the request and provide written notice that the project qualifies for Local Streets & Roads funds.
- For agencies with a PCI of 69 or lower, the program of projects is limited to projects that repair and maintain the street system.
- VTA will review the program of projects to ensure that all projects are eligible for funding.
- If an agency with a PCI of 70 or higher should have their PCI fall below 70, the agency must redirect all funding to repair and maintenance of the street system in the following cycle.
- Funds are distributed on a reimbursable basis.

Requirements

- Individual agencies must certify and submit on a fiscal year basis, a Maintenance of Effort report to maintain a level of expenditures on 2016 Measure B Local Streets & Roads eligible activities equivalent to the average expenditures on roadway and related maintenance activities from the agency's general fund during FY10 to FY12. This certification will be submitted with their Annual Program of Projects.
- All projects must comply with VTA's Complete Streets reporting requirements.
- All collateral material must comply with 2016 Measure B branding requirements.
- Agencies will submit annual reports detailing the progress on the previous program of projects. The information will be placed on the 2016 Measure B transparency website to keep the public informed on 2016 Measure B spending.

2016 Measure B BART Phase II Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

To fund the planning, engineering, construction and delivery costs of BART Phase II, which will create a new regional rail connection by extending BART from the Berryessa Station in San Jose to Santa Clara with stations at Alum Rock/28th Street, downtown San Jose, San Jose Diridon Station and Santa Clara.

Total Funding

23.8% of Program Tax Revenues - capped at a maximum of 25% of Program Tax Revenues.

Program Type

Need/Capacity-based program

- Must comply with Board-approved Project Readiness Criteria

Project Readiness Criteria

- Project delivery status: Allocations for projects in the 10-year Program will be based on project delivery phases and completion of each phase. Projects must complete prior delivery phase(s) as a prerequisite for allocation of funds in a Biennial Budget for the next phase.
- Funding status: Project must have non-2016 Measure B match funds identified for inclusion in the 10-year Program and secured for a Biennial Budget allocation.
- Partner agency/community support: Partner agencies must be identified for inclusion in the 10-year Program. Community, permitting agency and partner agency support must be demonstrated for a Biennial Budget allocation.

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- As the project moves forward and meets the Project Readiness criteria the Silicon Valley BART Phase II project team will submit requests to the 2016 Measure B Program Office for inclusion in the Biennial Budget and/or 10-year Program.
- The 2016 Measure B Program Office will program funding based on the Project Readiness criteria in the Biennial Budget and/or 10-year Program to complete project.
- Funds will be distributed on a reimbursable basis.

Requirements

- Project requires a minimum 10% non-2016 Measure B contribution.
- Project must comply with VTA's Complete Streets reporting requirements.
- Project must comply with 2016 Measure B program oversight requirements.
- All collateral material must comply with 2016 Measure B branding requirements.

2016 Measure B Bicycle & Pedestrian Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

To fund bicycle and pedestrian projects of countywide significance identified by the cities, County and VTA. The program will give priority to those projects that connect to schools, transit and employment centers; fill gaps in the existing bike and pedestrian network; safely cross barriers to mobility; and make walking or biking a safer and more convenient means of transportation for all county residents and visitors. Bicycle and pedestrian educational programs such as Safe Routes to Schools, will be eligible for funding.

Total Funding

3.97% of Program Tax Revenues

Program Type

Formula-based program

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- Funds are allocated on an annual basis, based on the application of the ballot-established ratio to the estimated Program Tax Revenue. The allocations are calculated in two steps:
 1. Multiplying the ballot-established ratio by the projected Program Tax Revenues for that fiscal year.
 2. Reconciling prior allocations, which were based on estimated Program Tax Revenues, with actual Program Tax Revenues (referred to as a “true-up process”). This true-up process will occur in the first fiscal year of each biennial budget cycle.
- The program will consist of three sub-categories: Education & Encouragement Programs, Planning Studies, and Capital Projects.
- A minimum of 80% of available program category funds will be allocated to Capital Projects.
- A maximum of 15% of available program category funds will be set aside for Education & Encouragement. The funds will be allocated as follows:
 1. 25% for countywide (including targeting unincorporated areas) education & encouragement programs
 2. Remaining funds allocated by city population formula with a \$10,000 annual minimum allocation per city
- A maximum of 5% of available program category funds will be allocated to Planning Studies.
- If the Planning Studies or Capital Projects competitive grant cycle is not fully awarded, the balance of funds from that cycle will roll into its next call for projects cycle.

Implementation

- Only projects currently listed on Attachment A of 2016 Measure B are eligible.
- **Education & Encouragement (Formula Distribution)**
 - VTA and individual agencies will enter into a Master Agreement for Education & Encouragement funds.
 - The 2016 Measure B Program Office will notify agency of allocation for two-year cycle.
 - Funds will be distributed on a reimbursable basis.
 - Agency will submit annual education & encouragement work program and annual progress report.
 - Education & Encouragement funds may be banked for a maximum of three years with explanation of banking purposes upon approval by the 2016 Measure B Program Office.
 - The 2016 Measure B Program Office will conduct an assessment regarding the effectiveness of the program.
- **Capital Projects & Planning Studies (Competitive Grants)**
 - Only a public agency can serve as a project sponsor. Other entities must partner with a public agency to apply for a grant.
 - The grant program contains two categories:
 - Capital projects
 - Activities leading to/including:
 - Environmental Clearance
 - Design
 - Right of Way
 - Construction
 - Construction grant requests must include cost estimates supported by 30% to 35% design.
 - Planning studies
 - Includes planning studies to support capital project development for those projects currently listed on Attachment A of 2016 Measure B. It does not include general/master planning efforts.
 - The minimum grant award is \$50,000.
 - The maximum grant award per sponsoring agency can be no more than 50% of the total available funds per call for projects per cycle, unless the cycle is undersubscribed.
 - The 2016 Measure B Program Office developed project criteria in conjunction with the VTA Technical Advisory Committee (TAC) Capital Improvement Program Working Group and incorporated input from the TAC and Bicycle & Pedestrian Advisory

Committee (BPAC).

- Scoring committees for the grant programs will be comprised of three BPAC members, three Member Agency staff, and one VTA staff person. If enough BPAC or Member Agency staff are not available as described above, Board-adopted scoring committee policy will be followed.

Criteria

- Capital Projects and Planning Studies will be scored on criteria that supports the language in 2016 Measure B, including but not limited to:
 - Countywide significance
 - Connection to/serves schools, transit, or employment centers
 - Fills gaps in bicycle/pedestrian network
 - Provides safer crossings of barriers
 - Makes walking or biking safer
 - Makes walking or biking more convenient
 - Other criteria to consider:
 - Safety benefits
 - Increase in bicycle and pedestrian usage
 - Community support
 - Project readiness
 - Projects serve Equity Priority Communities or vulnerable populations with specific needs
 - Non-2016 Measure B contribution

Requirements

- Competitive grant projects require a minimum 10% non-2016 Measure B contribution.
- Reporting requirements will be detailed in agreements executed with VTA for project funding.
- VTA Complete Streets reporting requirements are required for Planning Studies and Capital Projects.
- All projects must comply with 2016 Measure B program oversight requirements.
- All collateral material must comply with 2016 Measure B branding requirements.

2016 Measure B Caltrain Grade Separation Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

To fund grade separation projects along the Caltrain corridor in the cities of Sunnyvale, Mountain View and Palo Alto, separating the Caltrain tracks from roadways to provide increased safety benefits for drivers, bicyclists and pedestrians and also reduce congestion at the intersections.

Total Funding

11.11% of Program Tax Revenues

Program Type

Need/Capacity-based program

- Must comply with Board-approved Project Readiness Criteria

Project Readiness Criteria

- Project delivery status: Allocations for projects in the 10-year Program will be based on project delivery phases and completion of each phase. Projects must complete prior delivery phase(s) as a prerequisite for allocation of funds in a Biennial Budget for the next phase.
- Funding status: Project must have non-2016 Measure B match funds identified for inclusion in the 10-year Program and secured for a Biennial Budget allocation.
- Partner agency/community support: Partner agencies must be identified for inclusion in the 10-year Program. Community, permitting agency and partner agency support must be demonstrated for a Biennial Budget allocation.

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- As approved by the Board of Directors as the implementation strategy and as agreed to by VTA and the Cities of Sunnyvale, Mountain View and Palo Alto, total available program category funds will be allocated by percentage to each jurisdiction as follows:
 - City of Sunnyvale: 25%
 - City of Mountain View: 25%
 - City of Palo Alto: 50%
- At the end of the life of the sales tax, should the Program Tax Revenue available for the Grade Separation be higher than the originally estimated amount in 2017 dollars, the cities that have received their allocation based on previous percentage calculations will not receive any additional Grade Separation Program funds.
- The percentage distribution may be revised by the VTA Board of Directors.
- As candidate projects move forward and meet the Project Readiness criteria, the project sponsor will submit requests to the 2016 Measure B Program Office for inclusion in the Biennial Budget and/or 10-year Program.

- Funds will be distributed on a reimbursement basis.

Implementation

- VTA will work with the cities, Caltrain and other partners as applicable to deliver all eight grade separation projects eligible for 2016 Measure B funds.
- Based on the project's ability to meet the Project Readiness criteria, VTA will develop and enter funding agreements with individual jurisdictions for project phases.
- VTA will provide technical oversight to jurisdictions during project implementation.

Requirements

- All project sponsors must apply to the State §190 Grade Separation Program.
- Reporting requirements regarding project progress will be detailed in agreements executed with VTA for project funding.
- Projects require a minimum 10% non-2016 Measure B contribution.
- All projects must comply with VTA's Complete Streets reporting requirements.
- All projects must comply with 2016 Measure B program oversight requirements.
- All collateral material must comply with 2016 Measure B branding requirements.

2016 Measure B Caltrain Corridor Capacity Improvements Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

To fund Caltrain corridor capacity improvements and increased service in Santa Clara County in order to ease highway congestion, including: increased service to Morgan Hill and Gilroy, station improvements, level boarding, extended platforms and service enhancements.

Total Funding

4.98% of Program Tax Revenues

Program Type

Need/Capacity-based program

- Must comply with Board-approved Project Readiness Criteria

Project Readiness Criteria

- Project delivery status: Allocations for projects in the 10-year Program will be based on project delivery phases and completion of each phase. Projects must complete prior delivery phase(s) as a prerequisite for allocation of funds in a Biennial Budget for the next phase.
- Funding status: Project must have non-2016 Measure B match funds identified for inclusion in the 10-year Program and secured for a Biennial Budget allocation.
- Partner agency/community support: Partner agencies must be identified for inclusion in the 10-year Program. Community, permitting agency and partner agency support must be demonstrated for a Biennial Budget allocation.

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- As candidate projects move forward and meet the Project Readiness criteria, Caltrain will submit requests to the 2016 Measure B Program Office for inclusion in the Biennial Budget and/or 10-year Program.
- The 2016 Measure B Program Office will program funding based on the Project Readiness criteria in the Biennial Budget and/or 10-year Program to complete project.
- Funds for increased service to Morgan Hill and Gilroy will be distributed on a regular basis.
- Based on the project's ability to meet the Project Readiness criteria, VTA will develop and enter funding agreements.
- Funds will be distributed on a reimbursement basis.

Implementation

- Service schedule to Morgan Hill and Gilroy will be reevaluated prior to addition of increased service.

- VTA and Caltrain staff will determine operating and capital costs associated with increased service to Morgan Hill and Gilroy.
- Improvement projects will be identified by VTA and Caltrain staff after completion of Peninsula Corridor Electrification Project (PCEP) and CA High Speed Rail blended service operations and maintenance needs/issues have been identified and remedies finalized.
- Should projects (including station improvements) arise prior to the completion of the PCEP that VTA believes should move forward, VTA will work with Caltrain to develop and recommend an early implementation schedule to the VTA Board of Directors.

Requirements

- Projects require a minimum 10% non-2016 Measure B contribution.
- Capital projects in this program must comply with VTA's Complete Streets reporting requirements.
- All projects must comply with 2016 Measure B program oversight requirements.
- All collateral material must comply with 2016 Measure B branding requirements.

2016 Measure B Highway Interchanges Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

To fund highway projects throughout the valley that will provide congestion relief, improved highway operations and freeway access, noise abatement, roadway connection overcrossings, and deploy advanced technology through Intelligent Transportation Systems (ITS). Candidate Projects are set forth in Attachment B.

Total Funding

11.90% of Program Tax Revenues

Program Type

Need/Capacity-based program

- Must comply with Board-approved Project Readiness Criteria

Project Readiness Criteria

- Project delivery status: Allocations for projects in the 10-year Program will be based on project delivery phases and completion of each phase. Projects must complete prior delivery phase(s) as a prerequisite for allocation of funds in a Biennial Budget for the next phase.
- Funding status: Project must have non-2016 Measure B match funds identified for inclusion in the 10-year Program and secured for a Biennial Budget allocation.
- Partner agency/community support: Partner agencies must be identified for inclusion in the 10-year Program. Community, permitting agency and partner agency support must be demonstrated for a Biennial Budget allocation.

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- Funds will be distributed through two competitive grant programs: Capital Projects and Noise Abatement.
- As candidate projects move forward and meet the Project Readiness criteria, the project sponsor will submit requests to the 2016 Measure B Program Office for inclusion in the Biennial Budget and/or 10-year Program.
- The 2016 Measure B Program Office will program funding based on the Project Readiness criteria in the Biennial Budget and/or 10-year Program to complete project.
- Based on the project's ability to meet the Project Readiness Criteria, VTA will develop and enter funding agreements with the project sponsor.
- Funds will be distributed on a reimbursement basis.

Implementation

- Only projects and programs currently listed on 2016 Measure B Attachment B are eligible for Highway Interchanges program funds.

- Only VTA, Caltrans and Member Agencies can serve as an implementing agency.
- Capital Projects are in two categories:
 - Grandfathered projects and projects on the Board-adopted Highway Interchanges prioritized project list.
 - The 2016 Measure B Program Office will work with project sponsors to advance grandfathered projects and candidate projects on Board-adopted prioritized project list.
- Noise Abatement projects will be implemented through a separate competitive grant category within the Highway Interchanges Program and will have a separate eligible project list.

Requirements

- Projects require a minimum 10% non-2016 Measure B contribution.
- Reporting requirements regarding project progress will be detailed in agreements executed with VTA for project funding.
- All projects must comply with VTA's Complete Streets reporting requirements.
- All projects must comply with 2016 Measure B program oversight requirements.
- All collateral material must comply with 2016 Measure B branding requirements.

2016 Measure B County Expressways Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

To fund Tier 1 improvement projects in the County's Expressway Plan in order to relieve congestion, improve safety and increase the effectiveness of the expressway system in the county. Candidate Projects are set forth in Attachment C.

Total Funding

11.90% of Program Tax Revenues

Program Type

Need/Capacity-based program

- Must comply with Board-approved Project Readiness Criteria

Project Readiness Criteria

- Project delivery status: Allocations for projects in the 10-year Program will be based on project delivery phases and completion of each phase. Projects must complete prior delivery phase(s) as a prerequisite for allocation of funds in a Biennial Budget for the next phase.
- Funding status: Project must have non-2016 Measure B match funds identified for inclusion in the 10-year Program and secured for a Biennial Budget allocation.
- Partner agency/community support: Partner agencies must be identified for inclusion in the 10-year Program. Community, permitting agency and partner agency support must be demonstrated for a Biennial Budget allocation.

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- As candidate projects move forward and meet the Project Readiness criteria, the County Roads and Airports Expressways team will submit requests to the 2016 Measure B Program Office for inclusion in the Biennial Budget and/or 10-year Program.
- The 2016 Measure B Program Office will program funding based on the Project Readiness criteria in the Biennial Budget and/or 10-year Program to complete project.
- Funds will be distributed on a reimbursement basis.

Implementation

- Only projects and programs listed on Attachment C of 2016 Measure B are eligible.
- Program management of the validation, financing, phasing-strategy, and delivery of all projects and programs listed on Attachment C of 2016 Measure B are eligible costs.
- VTA and the County of Santa Clara will execute agreements for the administration and delivery of the 2016 Measure B County Expressways

Program projects.

- VTA staff will work with the County of Santa Clara to advance projects and maintain an implementation plan.
- County Expressway Policy Advisory Board (PAB) will recommend the prioritization of projects.
- The County of Santa Clara will develop project timelines based on the County Expressway PAB adopted criteria, which includes the following:
 - Project readiness
 - Complexity
 - Geographic balance and public impact
 - Timing of other funding sources
 - Additional factors
 - Safety
 - Public support
 - Gap closures

Requirements

- Program requires a minimum 10% non-2016 Measure B contribution.
- Reporting requirements regarding project progress will be detailed in agreements executed with VTA for project funding.
- All projects must comply with VTA's Complete Streets reporting requirements.
- All projects must comply with 2016 Measure B program oversight requirements.
- All collateral material must comply with 2016 Measure B branding requirements.

2016 Measure B State Route 85 Corridor Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

To fund new transit and congestion relief projects on SR 85, including a new transit lane from SR 87 in San Jose to U.S. 101 in Mountain View. Additionally this category will fund noise abatement along SR 85 and will provide funding to study transportation alternatives that include, but are not limited to, Bus Rapid Transit with infrastructure such as stations and access ramps, Light Rail Transit, and future transportation technologies that may be applicable.

Total Funding

5.56% of Program Tax Revenues

Program Type

Need/Capacity-based program

- Must comply with Board-approved Project Readiness Criteria

Project Readiness Criteria

- Project delivery status: Allocations for projects in the 10-year Program will be based on project delivery phases and completion of each phase. Projects must complete prior delivery phase(s) as a prerequisite for allocation of funds in a Biennial Budget for the next phase.
- Funding status: Project must have non-2016 Measure B match funds identified for inclusion in the 10-year Program and secured for a Biennial Budget allocation.
- Partner agency/community support: Partner agencies must be identified for inclusion in the 10-year Program. Community, permitting agency and partner agency support must be demonstrated for a Biennial Budget allocation.

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- As candidate projects move forward and meet the Project Readiness criteria, the project sponsor will submit requests to the 2016 Measure B Program Office for inclusion in the Biennial Budget and/or 10-year Program.
- The 2016 Measure B Program Office will program funding based on the Project Readiness criteria in the Biennial Budget and/or 10-year Program to complete project.
- Based on the project's ability to meet the Project Readiness Criteria, VTA will develop and enter funding agreements with the project sponsor.
- Funds will be distributed on a reimbursement basis.

Implementation

- VTA staff completed the SR 85 Transit Guideway Study to identify the most effective transit and congestion relief projects on SR 85, and the SR 85 Policy Advisory Board identified a preferred project that they recommended to the Board of Directors for further study.

- Projects identified by the Transit Guideway Study will be candidates for funding.
- An implementation strategy for SR 85 Corridor projects will be developed in consultation with the VTA Technical Advisory Committee.
- VTA will serve as the implementing agency for all program projects.
- Any activity on the portion of SR 85 that would preclude the implementation of a lane for transit purposes shall be suspended until the Transit Guideway Study has been received by the VTA Board of Directors.
- The five pilot projects identified in the SR 85 Noise Abatement Study are eligible for funds.
- Any eligible noise abatement project on SR 85 is eligible for these funds.

Requirements

- Program requires a minimum 10% non-2016 Measure B contribution.
- All projects must comply with VTA's Complete Streets reporting requirements.
- All projects must comply with 2016 Measure B program oversight requirements.
- All collateral material must comply with 2016 Measure B branding requirements.

2016 Measure B Transit Operations Program Guidelines

[Revised and approved by VTA Board of Directors: August 4, 2022]

The revenue from this program category will provide additional funds specifically for bus operations to serve vulnerable, underserved, and transit dependent populations throughout the county. The goals of the program category are to increase ridership, improve efficiency, enhance mobility services for seniors and disabled, and improve affordability for the underserved and vulnerable constituencies in the county. As VTA considers modifications to bus operations and routes to improve ridership and efficiencies, these funds may also be utilized to maintain and expand service to the most underserved and vulnerable populations. The funds may be used to increase core bus route service frequencies, extending hours of operations to early morning, evenings and weekends to improve mobility, safe access and affordability to residents that rely on bus service for critical transportation mobility needs. Attachment D describes the list of Candidate Projects and Programs.

Total Funding

7.94% of Program Tax Revenues

Program Type

Formula-based program

Distribution of Funds

- Funds will be allocated on a two-year cycle, in conjunction with the VTA Biennial Budget process.
- Funds are allocated on an annual basis, based on the application of the ballot-established ratio to the estimated Program Tax Revenue. The allocations are calculated in two steps:
 - Multiplying the ballot-established ratio by the projected Program Tax Revenues for that fiscal year.
 - Reconciling prior allocations, which were based on estimated Program Tax Revenues, with actual Program Tax Revenues (referred to as a “true-up process”). This true-up process will occur in the first fiscal year of each biennial budget cycle.
- The Transit Operations Program Category funding will be allocated for the following four sub-categories identified in 2016 Measure B Attachment D:
 - **Enhance Frequent Core Bus Network** by increasing core bus route service frequencies, and expanding or adding additional evening, late night and weekend service.
 - **Expand mobility services and affordable fare programs** for seniors, disabled, students and low-income riders.
 - Support **new/innovative transit service models** to address first/last mile connections and transit services for the transit dependent, vulnerable populations and paratransit users that is safe and accountable.
 - **Improve amenities at bus stops** to increase safety, security and access with

lighting and access improvements.

The allocations for the four sub-categories are as follows:

2016 Measure B Transit Operations Program	
Sub-category	Funding Allocation
Frequent Core Bus Network	73%
Innovative Transit Service Models	8%
Affordable Fare Programs	15%
Bus Stop Amenities	4%

Implementation

- Only projects and programs currently listed on 2016 Measure B Attachment D are eligible.
- **Enhanced Frequent Core Bus Network** will directly fund VTA's core bus network of services, maintain or increasing core bus route service frequencies, and expanding or adding evening, late night and weekend service.
- **Fare Programs** will directly fund VTA's Transit Assistance Program (TAP) and reduced fares for youth.
- **Innovative Transit Service Models** (Competitive Grant) will support goals to address first/last mile connections.
 - Only a public agency can serve as a project sponsor. Other entities must partner with a public agency to apply for a grant.
 - The minimum grant award is \$250,000.
 - The maximum grant award per sponsoring agency can be no more than 50% of the total available funds per call for projects per cycle, unless the cycle is undersubscribed.
 - The 2016 Measure B Program Office developed project criteria in conjunction with the VTA Technical Advisory Committee Capital Improvement Program Working Group and incorporated input from VTA committees.
- **Bus Stop Amenities** will directly fund improvements at VTA's bus stops. The bus stop improvements will be prioritized based on VTA's Transit Passenger Environment Plan or subsequent plans and ongoing maintenance needs.

Requirements

- Innovative Transit Service Models Competitive Grant Program
 - Reporting requirements will be detailed in agreements executed with VTA for project funding.
 - Funds will be distributed on a reimbursement basis.
- All capital projects must comply with VTA Complete Streets reporting requirements.
- All projects must comply with 2016 Measure B program oversight requirements.
- All collateral material must comply with 2016 Measure B branding requirements.

2016 Measure B Need/Capacity-based Program Project Readiness Criteria

Adopted by the VTA Board on May 6, 2021

Criterion #1: Project delivery status

Allocations for projects in the 10-year Program will be based on project delivery phases and completion of each phase. Projects must complete prior delivery phase(s) as a prerequisite for allocation of funds in a Biennial Budget for the next phase.

As an example, *a project for which design funding is requested* in the Biennial Budget would need to have completed the environmental phase and have the environmental document approved by the appropriate governing body. A project may be included in the 10-year Program for a specific project delivery phase even if it is not included in the Biennial Budget.

Criterion #2: Funding status

Project must have non-2016 Measure B match funds identified for inclusion in the 10-year Program and secured for a Biennial Budget allocation.

As an example, *a project for which design funding is requested* in the Biennial Budget would need to have non-2016 Measure B funds secured in the project sponsor's adopted budget for the design period. If the project is requesting design funding for the 10-year Program, that project must identify a funding plan for the remaining phases of the project.

Criterion #3: Partner agency/community support

Partner agencies must be identified for inclusion in the 10-year Program. Community, permitting agency and partner agency support must be demonstrated for a Biennial Budget allocation.

As an example, *a project for which design funding is requested* in the Biennial Budget must have letters of agreement or memoranda of understanding executed with all partner agencies that support the continued development of the project, and legal challenges impacting the project schedule must be resolved before funding is approved in the Biennial Budget. If the project is requesting design funding in the 10-year Program, all partner agencies involved with the project must be identified.

2016 Measure B 10-year Program and Biennial Budget Principles

Adopted by the VTA Board of Directors April 1, 2021

Comply with the language of the ballot measure (including any amendments approved pursuant to the ballot language)

- Provide funding to all nine program categories over the life of the measure in the ratios established in the ballot language. The VTA Board of Directors may modify these ratios as specified in the ballot language.

Invest in all nine program categories throughout the 10-year period, as long as funding remains available in the program category, with the understanding that there may not be allocations in all categories annually.

- To the extent possible, allocate some level of funding to all nine program categories throughout the ten-year period. Once 30-year program category allocation ratios are fulfilled, no additional allocations will be made in future 10-year plans. Since funding for capital projects tends to be “lumpy” to fit the different stages of project development, there will not necessarily be annual investments in some program categories

Apply ballot-established ratios to Formula-based programs on an annual basis

- Fund the Local Streets and Roads, Bicycle/Pedestrian and Transit Operations program categories each year, based on their ratio of the estimated Program Tax Revenues. A true-up for each Formula-based program category will occur in the first fiscal year of each biennial budget cycle.

Apply Board-approved project readiness selection criteria to Need/Capacity-based programs for projects to be included in the 10-year Program and Biennial Budget, and apply specific project prioritization processes for each program consistent with the 25% cap of Program Tax Revenues on the BART Phase II program category and all ratios applicable to each category

- Require projects in the Need/Capacity-based programs to meet criteria approved by the VTA Board of Directors in order to be included within the 10-year Program or Biennial Budget. Every two years, the projected revenues will be updated, the ratio share for each of the Need/Capacity-based programs recalculated, and the 10-year Program and biennial budget recommendations adjusted accordingly. Total allocations to the Need-Capacity-based programs over the life of the measure will be subject to the allocation ratios contained in the ballot language.

Use financing tools, subject to approval by the VTA Board of Directors, to make funding available when projects are ready, subject to available financing capacity

- If anticipated 2016 Measure B allocation needs in a Biennial Budget surpass the projected revenues, financing tools will be used to fund the projects within that Biennial

Budget. The specific financing tool will be approved by the VTA Board of Directors at the time the funds are actually needed.

Explicitly and transparently consider opportunities from external funders, subject to the constraints of the other principles

- This principle encourages the allocation of funds in the Biennial Budget and the 10-Year Program of Projects to maximize opportunities for external funding subject to the constraints of the other principles

2016 Measure B Ten-Year Program Allocations: FY 2024 to FY 2033

	% of Program Tax Revenue ⁽¹⁾	FY18 to FY23 Allocations	회계연도									
			2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
2016 법안 B												
Administrative	NA	15.20	1.50	2.00	3.50	3.50	3.30	4.00	4.00	4.00	4.25	4.25
Bond Interest & Issuance Costs ⁽²⁾	NA				18.59	36.91	48.55	48.90	49.65	47.70	35.44	34.14
Formula Programs ⁽³⁾												
지역 거리 및 도로	19.05%	270.70	52.63	54.71	53.17	51.66	51.19	52.86	54.48	56.67	60.82	62.98
자전거 및 보행자	3.97%	56.39	10.23	11.40	11.08	10.76	10.67	11.02	11.35	11.81	12.67	13.12
대중교통 운영	7.94%	112.78	17.87	22.80	22.16	21.53	21.34	22.03	22.71	23.62	25.35	26.25
Subtotal Formula Programs		439.87	80.73	88.90	86.42	83.95	83.20	85.91	88.55	92.09	98.84	102.35
Need/Capacity Based Programs ⁽⁴⁾												
BART 2단계	23.81%	150.00	425.00	150.00	450.00	220.00	0.00	110.00	350.00	85.00	57.00	90.00
Caltrain 교차 분리	11.11%	71.00	10.00	97.00	123.00	205.00	175.00	0.00	24.00	0.00	0.00	52.00
Caltrain 통로 용량 개선 ⁽⁵⁾	4.98%	42.45	-	-	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
고속도로 교차로	11.90%	364.79	10.36	38.00	105.20	15.05	-	-	-	-	-	-
카운티 간선도로	11.90%	50.00	0.30	4.00	10.00	28.00	-	-	8.00	-	-	-
주도 85번 ⁽⁶⁾	5.56%	14.50	-	-	5.00	5.00	15.00	200.00	-	-	-	-
Subtotal Need/Capacity-based Programs		692.74	445.66	289.00	695.20	475.05	192.00	312.00	384.00	87.00	59.00	144.00
TOTAL 2016 MEASURE B ALLOCATION		1147.81	527.89	379.90	803.71	599.41	327.75	450.81	526.20	230.79	197.53	284.74

⁽¹⁾ May not add due to rounding.

⁽²⁾ Illustrative only and subject to change. Any use of financing requires Board approval.

⁽³⁾ FY 2024 trues up previous allocations for formula-based categories.

⁽⁴⁾ Both FY 2024 & FY 2025 allocations are available at the beginning of FY 2024.

⁽⁵⁾ Previously approved allocations available and sufficient for projected FY 2024/FY 2025 needs Remaining year allocations currently in development.

⁽⁶⁾ Previously approved allocations available and sufficient for projected FY 2024/FY 2025 needs.

부록6.7 - 2016 법안 B 프로그램 범주별 프로그램 할당

지역 거리 및 도로 - \$323,330,345 total

회원 기관	이전 배정	2024 회계연도 배정	총 배정 2024 회계연도까지
Campbell	\$5,327,168	\$1,069,176	\$6,396,343
Cupertino	\$7,506,541	\$1,487,954	\$19,284,542
Gilroy	\$6,976,578	\$1,479,442	\$154,470,168
Los Altos	\$3,861,580	\$786,936	\$8,994,494
Los Altos Hills	\$1,073,028	\$209,676	\$8,456,021
Los Gatos	\$3,889,441	\$825,276	\$4,648,516
Milpitas	\$9,455,151	\$2,017,862	\$1,282,704
Monte Sereno	\$455,797	\$87,065	\$4,714,717
Morgan Hill	\$5,690,031	\$1,159,486	\$6,849,517
Mountain View	\$10,229,400	\$2,093,370	\$11,473,013
Palo Alto	\$8,585,630	\$1,684,226	\$542,861
San Jose	\$130,095,720	\$24,374,448	\$12,322,770
Santa Clara	\$16,036,377	\$3,248,164	\$10,269,856
Saratoga	\$3,903,769	\$765,494	\$45,793,609
Sunnyvale	\$19,262,111	\$3,899,834	\$4,669,263
Santa Clara County	\$38,351,678	\$7,441,931	\$23,161,944
총계	\$270,700,000	\$52,630,347	\$323,330,345

BART 2단계 - \$897.6M total

이전 배정	\$150M
2024 & 2025 회계연도 배정	\$747.60M
총계	\$897.60M

Caltrain 교차 분리 - \$180M total

이전 배정	\$71M
2024 & 2025 회계연도 배정	\$107M
총계	\$180M

Caltrain 통로 용량 개선 - \$42.45M total

이전 배정	\$42.45M
2024 & 2025 회계연도 배정	\$0M
총계	\$42.45M

자전거 및 보행자

교육 및 장려 하위 범주 - \$76.3M total

회원 기관	이전 배정	2024 회계연도 배정	총 배정 2024 회계연도까지
Campbell	\$203,641	\$30,178	\$233,819
Cupertino	\$259,938	\$38,082	\$298,020
Gilroy	\$250,324	\$37,921	\$288,245
Los Altos	\$165,051	\$24,852	\$189,903
Los Altos Hills	\$60,853	\$10,000	\$70,853
Los Gatos	\$165,391	\$25,575	\$190,967
Milpitas	\$129,588	\$48,083	\$177,671
Monte Sereno	\$60,366	\$10,000	\$70,366
Morgan Hill	\$215,966	\$31,883	\$247,849
Mountain View	\$336,020	\$49,508	\$385,528
Palo Alto	\$291,940	\$41,786	\$333,726
San Jose	\$3,581,812	\$470,014	\$4,051,826
Santa Clara	\$495,783	\$71,302	\$567,085
Saratoga	\$164,250	\$24,447	\$188,697
Sunnyvale	\$579,077	\$83,601	\$662,677
Countywide/VTA	\$1,500,000	\$332,410	\$1,832,410
총계	\$8,460,000	\$1,330,000	\$9,790,000

⁽¹⁾ Discrepancies due to rounding may occur

자본 프로젝트 하위 범주 - \$62.6M total

이전 배정	\$45.11M
2024 & 2025 회계연도 배정	\$17.49M
총계	\$62.6M

연구 계획 하위 항목 - \$3.91M total

이전 배정	\$2.82M
2024 & 2025 회계연도 배정	\$1.09M
총계	\$3.91M

고속도로 교차로 - \$436.85M total

프로젝트	이전 배정	2024 & 2025 회계연도 배정	총 배정 2025 회계연도까지
SR 17 남쪽방향/해밀턴 애비뉴(Hamilton Ave.) 진출 차선 확장	\$1M	\$0	\$1M
SR 17/산 토마스(San Tomas) 고속도로 임시 개선	\$1M	\$0	\$1M
고속도로 교통 운영 시스템/고속도로 성능 이니셔티브 단계 1 & 2	\$3M	\$0	\$3M
소음 저감 프로그램(카운티 전역)	\$4M	\$0	\$4M
I-280/울프 로드(Wolfe Rd.) 분기점 개선	\$92.70M	\$14.54M	\$107.24M
I-280 북쪽방향: 풋힐(Foothill) 고속도로 방향의 두 번째 진출 레인	\$5.50M	\$0	\$5.50M
SR 17/SR 9 분기점 등 하이웨이 17 구간 교통체증 완화	\$13.20M	\$0	\$13.20M
US 101/SR 25 분기점	\$46M	\$30.80M	\$76.80M
칼라베라스 대로(Calaveras Boulevard) 확장	\$0	\$9.60M	\$9.60M
칼라베라스 대로(Calaveras Boulevard) 확장 - 단기 개선	\$3.80M	\$1.20M	\$5M
미들필드 로드(Middlefield Road)의 SR 237 서쪽방면 진입 차선	\$6.30M	\$0	\$6.30M
US 101 분기점 개선: 산안토니오 로드(San Antonio Rd.)에서 찰스턴 로드(Charleston Rd.)/랭스토프 애비뉴(Rengstorff Ave.)	\$7.32M	\$0	\$7.32M
US 101 남쪽방향/트림블 로드(Trimble Rd.)/데라크루즈 대로(De La Cruz Blvd.)/센트럴 고속도로(Central Expwy.) 분기점 개선	\$47M	\$550K	\$47.55M
남쪽방향 SR 87로의 이중 차선 남쪽방향 US 101 진출 차선	\$3M	\$0	\$3M
US 101/마버리 로드(Mabury Rd.)/테일러 스트리트(Taylor St.) 분기점 건설	\$3M	\$0	\$3M
I-280/윈체스터 대로(Winchester Blvd.) 분기점 개선	\$20.57M	\$0	\$20.57M
SR 87 기술 기반 구간 개선 - (SR 87 샤르코(Charcot) 진입 차선 HOV 우회)	\$2.70M	\$0	\$2.70M
US 101/젠커 로드(Zanker Rd.)/스카이포트 지구(Skyport Dr.)/포스 스트리트(Fourth St.) 분기점 개선	\$9M	\$9.47M	\$18.47M
US 101/블로섬힐 로드(Blossom Hill Rd.) 분기점 개선	\$40.50M	\$1M	\$41.50M
샤르코(Charcot) 육교	\$27.50M	\$0	\$27.50M
SR 237/마틸다 애비뉴(Mathilda Ave.) 및 US 101/마틸다 애비뉴(Mathilda Ave.) 분기점 개선	\$21.30M	\$0	\$21.30M
US 101/SR 152/10번가(10th Street) 분기점 개선	\$1M	\$3.60M	\$4.60M
US 101/쇼어라인 대로(Shoreline Blvd) 북쪽방향 진출 차선 재조정 및 버스 차선	\$5M	\$0	\$5M
US 101/SR 25 Santa Teresa Blvd. 확장	\$0	\$600K	\$600K
고속도로 프로그램 관리/감독	\$400K	\$0	\$400K
총계	\$364.79M	\$72.06M	\$436.85M

카운티 간선도로 - \$54.3M total

이전 배정	\$50M
2024 & 2025 회계연도 배정	\$4.30M
총계	\$54.30M

주도 85번 - \$21.12M total

이전 배정	\$14.50M
2024 & 2025 회계연도 배정	\$6.62M
총계	\$21.12M

대중교통 운영 - \$112.78M total

대중교통 운영	이전 배정	2024 회계연도 배정	총 배정 2024 회계연도까지
Enhance Core Network	\$82.17M	\$12.63M	\$94.8M
Expand Mobility & Affordable Fares	\$16.92M	\$2.66M	\$19.58M
Innovative Transit	\$9.19M	\$1.75M	\$10.94M
Improve Amenities	\$4.50M	\$1.74M (FY 2022 & FY 2023)	\$6.24M
총계	\$112.78M	\$18.78M	\$131.56M

행정 비용 - \$16M total

이전 배정	\$15.20M
2024 회계연도 배정	\$1.50M
총계	\$16.70M



Figure A6.7 - 2016 Measure B allocation to expenditure process.

이 그림은 2016 법안 B 기금의 일반적인 3단계 배분 절차를 도시합니다. 첫 번째 단계는 할당 단계로, VTA 이사회가 2년마다 2016 법안 B기금을 2년마다 격년 예산 주기의 일환으로 배정하는 것을 말합니다. 두 번째 단계는 수여 단계로, 필요한 계약을 체결하고 특정 프로젝트를 위해 수혜자에게 기금을 제공합니다. 세 번째 단계는 지출 단계로, 수혜자가 완료된 활동의 적격 비용에 대한 송장을 제출하고 2016 법안 B 환급을 요청하여 지출이 발생하는 단계입니다.