

July 24, 2015

Dear Friend,

November 2016 will be here before we know it.

In our respective roles, we are all involved in the continuing talks about a potential 2016 transportation sales tax measure. As we consider what that measure might look like, I thought it would be helpful for you to have a copy of the enclosed report which analyzes the sources and uses of recent transportation sales tax measures in Santa Clara County.

As you can see from the attached chart, almost 80% of the revenues from the past two transportation tax measures (2000 and 2008) have gone to fund the "BART to San Jose" effort. We all must keep an open mind, but also certainly keep in mind the need for real congestion relief in the North County and West Valley. I hope you find the enclosed helpful.

Sincerely,

A handwritten signature in black ink, appearing to read "S. Simitian". The signature is stylized with a large initial "S" and a long horizontal stroke at the end.

S. Joseph Simitian  
County Supervisor, Fifth District

Enclosures

# County of Santa Clara

Roads and Airports Department



101 Skyport Drive  
San Jose, California 95110-1302  
1-408-573-2400

Date: March 31, 2015  
To: Board of Supervisors  
From: *MM* Michael Murdter  
Director, Roads & Airports Dept.  
Subject: **Transportation Tax Information**

The Board requested the following information outlined in the referral approved at its September 23, 2014 meeting (Item 11), which was amended pursuant to Board discussion and a subsequent letter from Supervisor Simitian dated October 29, 2014:

- (1) For the 1984 Measure A, 1996 Measure A/B, 2000 Measure A and 2008 Measure B, provide the following:
  - The vote distribution, by Board District, both in percentage and total number of votes for and against.
  - The allocation, by Board District, of the expenditures for transportation [projects] funded by the tax revenue.
  - The apportionment, by Board District, of the tax revenue generated by the Measures.
  - Information relating to the expenditures already allocated and expenditures identified for specific purposes in the future.
  - Information relating to the degree to which expenditures mirrored the uses specified in the Measures' ballot text.
- (2) A presentation regarding the overall County plan to identify needs and priorities and receive information from the Santa Clara Valley Transportation Authority (VTA) regarding their processes, vision and intent.

The following information is provided off-agenda in response to (1) above. The presentation requested in (2) above will be agendaized for an upcoming Board meeting.

**Attachment A** is the original September 23, 2014 Board referral.

**Attachment B** is the letter from Supervisor Simitian dated October 29, 2014 amending the scope of the referral.

**Attachment C** contains the actual text of the aforementioned ballot measures as well as the text of the 1961 Measure A for County Highways and Expressways.

**Attachment D** provides the vote distribution, by Supervisorial District, both in percentage and total number of votes for and against, for the aforementioned ballot measures as well as the 1961 Measure A for County Highways and Expressways and the 1976 permanent ½-cent sales tax for transit.

**Attachment E** provides the allocation, by Supervisorial District, of the expenditures for transportation projects funded by the 1984 Measure A.

**Attachment F** provides the allocation, by Supervisorial District, of the expenditures for transportation projects funded by the 1996 Measure B.

**Attachment G** provides the allocation, by Supervisorial District, of the expenditures for transportation projects funded by the 2000 Measure A and is broken down into two parts. The first part tabulates BART-related costs (totaling \$3.33 billion) and the second part tabulates all other costs (totaling \$937 million). The primary source of cost information is **Attachment H**, an October 2014 VTA document entitled "2000 Measure A Transit Improvement Program" that lists all projects comprising the measure's expenditure plan.

The request for information distinguishing between measure expenditures already allocated and expenditures identified for specific purposes in the future applies only to the 2000 Measure A because all of the 1984 and 1996 measure funding has been expended and all of the 2008 measure funding is being banked for future BART operating and maintenance costs. Attachment H provides this information for the 2000 Measure A in the columns entitled "Estimated Cost - Measure A Portion" and "Incurred Cost - Measure A Portion."

**Attachment I** is a roll-up summarizing the allocation, by Supervisorial District, of the total expenditures for projects funded by the 1984, 1996, 2000 and 2008 measures. Since BART-related expenditures represent such a large component of total expenditures, staff calculated total expenditures by Supervisorial District both including BART and not including BART.

Regarding the request for information relating to the degree to which expenditures mirrored the uses specified in the Measures' ballot text, staff has organized this report in such a way that the reader may compare the ballot measure text (Attachment C) with the actual project expenditures (Attachments E, F and G) and reach his or her own conclusion.

**Attachment J** tabulates the dollar amounts and percentages of the 1% Bradley Burns sales tax generated in each Supervisorial District from 2005 - 2014. (The dollar amounts are relevant only in that they are used to calculate the percentage of the total tax proceeds generated by each District.) Since the overall sales tax rate is simply a multiple of the 1% Bradley Burns rate, these percentages also represent the breakdown by Supervisorial District of all other components of the sales tax including transportation funding measures. The percentage of overall tax proceeds generated by each Supervisorial District varies little from year to year; thus the 10-year average for each district was assumed to represent the source of the sales tax proceeds generated by each of the local sales tax measures.

**Attachment K** is a graphic illustrating the relative levels of funding generated by the four measures for roads vs. transit.

cc: Jeff Smith, County Executive  
Gary Graves, Chief Operating Officer  
Sylvia Gallegos, Deputy County Executive  
Emily Harrison, Director, Finance Agency  
Lynn Regadanz, Clerk of the Board of Supervisors (Leg. File 73591)



County of Santa Clara  
Board of Supervisors  
Supervisorial District 5  
Supervisor S. Joseph Simitian



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73591 A

**DATE:** September 23, 2014  
**TO:** Board of Supervisors  
**FROM:** S. Joseph Simitian, Supervisor  
**SUBJECT:** Transportation tax information

**RECOMMENDED ACTION**

Direct Administration to report to the Board of Supervisors identifying by Board District, the vote allocation and revenue allocation of the 2000 and 2008 County sales tax increases for transportation measures. (Simitian)

**BACKGROUND**

On November 7, 2000, a Valley Transportation Authority 0.5 cent sales tax (for a period of 30 years beginning in March of 2006) was approved by Santa Clara County voters for various transit related measures.

On November 4, 2008, a Valley Transportation Authority 0.125 cent sales tax (for a period of 30 years from the onset of matching state and federal funds) was approved by Santa Clara County voters for BART extension to Santa Clara County, including connection with the existing Caltrain corridor.

In light of recent efforts to place another transportation tax measure on the November ballot, which has since been postponed but is anticipated to return at a future date, the requested information would be valuable to assist in discerning both effective and equitable distribution of potential future transportation project funding.

The report should contain for each tax measure identified above:

- The vote distribution, by Board District, both in percentage and total number of votes for and against; and
- The allocation, by Board District, of the expenditures for transportation measures funded by the tax revenue.

**S. JOSEPH SIMITIAN**  
**SANTA CLARA COUNTY SUPERVISOR, DISTRICT FIVE**

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October 29, 2014

Michael Murdter, Director  
Roads and Airports Department  
101 Skyport Drive  
San Jose, CA 95110

Dear Mr. Murdter,

At its September 23 meeting, the Board of Supervisors approved a referral I authored requesting information about voter-approved sales tax increases for transportation projects. Specifically, the referral requested vote allocations and revenue allocations (by supervisorial district) for both Measure A (2000) and Measure B (2008).

I understand your department will be coordinating the Administration's response to this referral. Therefore, I would like to make the following two requests for the inclusion of additional information in such response:

1. Include vote and revenue allocations (by supervisorial district) for Measure A (1984) and Measures A & B (1996); and
2. For all measures included, distinguish between expenditures already allocated and expenditures identified for specific purposes in the future

Thank you for considering these requests. By including this additional information, the Board will have a fuller understanding of how voter-approved transportation dollars have been used in our County, and we will be better positioned to make informed transportation decisions in the future.

Sincerely,

S. Joseph Simitian  
Supervisor, Fifth District

cc: Jeff Smith, County Executive

# Local Initiative Ballot Measures for Transportation Improvements in Santa Clara County

## Ballot Measure Text

### **2008 Measure B**

To reduce dependence on foreign oil, help relieve soaring gas prices and combat climate change, shall the Santa Clara Valley Transportation Authority enact a 1/8 cent sales tax limited to thirty years for BART to operate/ maintain/ improve the 16.1 mile Santa Clara County BART extension, with stations in Milpitas, San Jose, and Santa Clara, connecting with Caltrain from Gilroy to San Francisco and an Airport People Mover, to be collected **only if** sufficient state/federal funds are secured to match local construction dollars?

### **2000 Measure A**

#### ½ CENT TRANSIT SALES TAX

to:

- Connect BART to Milpitas, San Jose, Santa Clara;
- Build rail connection from San Jose Airport to BART, Caltrain, light rail;
- Purchase vehicles for disabled access, senior safety, clean air buses;
- Provide light rail throughout Santa Clara County;
- Expand, electrify Caltrain
- Increase rail, bus service

Shall Santa Clara Valley Transportation Authority enact a ½ sales tax for 30 years beginning 4/01/06 when current tax expires, with annual audits published in local newspapers and an independent citizen's watchdog committee?

### **1996 Measure B**

Shall the Board of Supervisors enact a ½ cent sales tax for general county purposes, with the following mandatory restrictions?

- The sales tax must expire after nine years
- A Citizens Watchdog Committee, selected independently with direction from the County Grand Jury and the League of Women Voters, will conduct yearly audits of all sales tax expenditures.
- These yearly sales tax expenditure audits must be reported to the public and published in local newspapers.



1996 Measure B followed Measure A on the ballot. Measure A read as follows:

ADVISORY VOTE ONLY. THIS MEASURE DOES NOT INCREASE TAXES. Shall any new voter-approved sales tax fund these transportation improvements?

- fix streets, potholes;
- link to BART
- synchronize all expressway [traffic signals];
- build Tasman, Capitol, Vasona Light Rail;
- widen Highways 880, 101, 87, 17;
- increase Caltrain service;
- upgrade 237/880, 85/101, 85/87 interchanges;
- improve safety: Pacheco Pass, Highway 85;
- expand bicycle routes;
- improve senior, disabled transit service.

Projects shall be implemented within nine years and administrative expenses limited to ½ of 1% maximum.

#### **1984 Measure A**

TRANSPORTATION—SANTA CLARA COUNTY COMMUTER RELIEF ACT. To create the Santa Clara County Traffic Authority, to improve, expand and construct the highway transportation system in the County, to authorize the authority to impose a one-half of 1 percent transactions and use tax (for a period not to exceed 10 years) solely for highway transportation purposes and to issue bonds payable from the proceeds of that tax, and to establish the appropriation limit (annual) of the authority in the amount of 306.39 million dollars (\$306,390,000).

#### **1961 Measure A**

MEASURE (A): (County Highways and Expressways) Shall the County of Santa Clara incur a bonded indebtedness in the principal amount of \$70,000,000 for the object and purpose of acquiring, constructing, and completing the following county improvement, to wit: County highways and expressways, including new county highways and expressways; improvement, replacement, relocation, realignment or reconstruction of existing county highways and of city streets to be established as county highways; interchanges, grade separations, and highway bridges and sites and approaches therefor; highway and expressway access and frontage roads and facilities; grading, paving, surfacing, fencing, curbs, drains and culverts; lands, easements and rights of way; and other works, property or structures necessary or convenient for said county improvement?

## SANTA CLARA COUNTY TRANSPORTATION MEASURES VOTING RESULTS BY SUPERVISORIAL DISTRICT

Local Initiatives			District 1		District 2		District 3		District 4		District 5		Countywide	
			Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Voting Results			#	#	#	#	#	#	#	#	#	#	#	
Year	Source	Name	%	%	%	%	%	%	%	%	%	%	%	
1961	bonds on property tax	Meas. A	results		not		available		by		district		47,985	21,762
													69	31
1976	1/2-cent sales tax (perm)	Transit	16,360	13,414	7,726	5,676	10,414	8,870	12,272	10,152	19,221	14,752	67,596	54,453
			55	45	58	42	54	46	55	45	57	43	55	45
1984	1/2-cent sales tax (10-yr)	Meas A	57,912	44,683	46,083	33,707	47,638	35,082	55,937	46,464	73,752	59,090	281,322	219,026
			56	44	58	42	58	42	55	45	56	44	56	44
1996	1/2-cent sales tax (9-yr)	Meas B	53,028	50,914	30,503	26,593	45,295	43,251	49,592	47,114	62,192	55,807	240,610	223,679
			51	49	53	47	51	49	51	49	53	47	52	48
2000	1/2-cent sales tax (30-yr)	Meas A	78,187	37,005	47,389	18,673	71,242	27,086	71,850	29,521	89,198	36,608	357,866	148,893
			68	32	72	28	72	28	71	29	71	29	71	29
2008	1/8-cent sales tax (30-yr)	Meas B	89,525	51,698	60,710	22,734	77,089	33,195	86,806	43,371	100,198	55,105	414,328	206,103
			63	37	73	27	70	30	67	33	65	35	67	33

## 1984 Measure A 1/2-cent Sales Tax (10 yrs.)

Project	1	2	3	4	5	Project Total
101 Widening	\$ 84,000,000	\$ 37,000,000	\$ 37,000,000	\$ 15,000,000	\$ 37,000,000	\$ 210,000,000
SR237 Improvements	\$ -	\$ -	\$ 236,000,000	\$ 21,400,000	\$ 42,600,000	\$ 300,000,000
SR85 Construction	\$ 373,000,000	\$ -	\$ -	\$ 124,000,000	\$ 193,000,000	\$ 690,000,000
<b>TOTAL EXPENDITURES</b>	<b>\$ 457,000,000</b>	<b>\$ 37,000,000</b>	<b>\$ 273,000,000</b>	<b>\$ 160,400,000</b>	<b>\$ 272,600,000</b>	<b>\$ 1,200,000,000</b>
Percentage of total by S. D.	38.1%	3.1%	22.8%	13.4%	22.7%	100.0%

NOTES:

- 1) Expenditures were apportioned by Supervisorial District based on the project's mileage of roadway within each district.
- 2) Project-level data is not available; costs per mile were thus assumed to be uniform among the three projects.



## 1996 Measure B 1/2-cent Transportation Improvement Program (9 yrs. effective April 1, 1997)

Project	1	2	3	4	5	Total
Tasman East LRT	\$ -	\$ -	\$ 139,970,343	\$ -	\$ -	\$ 139,970,343
Capitol LRT	\$ -	\$ 22,328,747	\$ 89,314,990	\$ -	\$ -	\$ 111,643,737
Vasona LRT	\$ -	\$ 28,610,186	\$ -	\$ 191,468,169	\$ -	\$ 220,078,355
Low Floor LRT Vehicles	\$ 57,669,339	\$ 92,270,942	\$ 89,387,475	\$ 31,718,136	\$ 17,300,802	\$ 288,346,693
Caltrain Service Improvements	\$ 7,263,229	\$ 4,842,153	\$ 16,947,535	\$ 7,263,229	\$ 7,763,229	\$ 44,079,375
Fremont/South Bay Connector	\$ -	\$ -	\$ 3,229,361	\$ -	\$ -	\$ 3,229,361
Route 880 Widening	\$ -	\$ -	\$ 61,168,997	\$ -	\$ -	\$ 61,168,997
Route 85/87 Interchange	\$ 39,850,000	\$ -	\$ -	\$ -	\$ -	\$ 39,850,000
Route 101 Widening	\$ 50,395,519	\$ -	\$ -	\$ -	\$ -	\$ 50,395,519
Route 85/101 Interchange (North)	\$ -	\$ -	\$ -	\$ -	\$ 98,055,000	\$ 98,055,000
Route 237/880 Interchange	\$ -	\$ -	\$ 49,537,061	\$ -	\$ -	\$ 49,537,061
Route 87 HOV Lanes (North)	\$ -	\$ 6,283,429	\$ 4,712,571	\$ -	\$ -	\$ 10,996,000
Route 17 Improvements	\$ -	\$ -	\$ -	\$ 26,536,000	\$ -	\$ 26,536,000
Route 85/101 Interchange (South)	\$ 43,039,000	\$ -	\$ -	\$ -	\$ -	\$ 43,039,000
Route 87 HOV Lanes (South)	\$ 1,803,571	\$ 10,821,429	\$ -	\$ -	\$ -	\$ 12,625,000
Route 152 Improvements	\$ 20,631,000	\$ -	\$ -	\$ -	\$ -	\$ 20,631,000
Route 85 Noise Mitigation	\$ 1,065,260	\$ -	\$ -	\$ 3,195,780	\$ 3,347,960	\$ 7,609,000
Pavement Management Program (PMP)	\$ 20,400,000	\$ 12,500,000	\$ 14,200,000	\$ 23,300,000	\$ 19,600,000	\$ 90,000,000
Bicycle/Mitigation/CODE/Misc.	\$ 5,907,600	\$ 5,907,600	\$ 5,907,600	\$ 5,907,600	\$ 5,907,600	\$ 29,538,000
<b>TOTAL EXPENDITURES</b>	<b>\$ 248,024,518</b>	<b>\$ 183,564,485</b>	<b>\$ 474,375,933</b>	<b>\$ 289,388,914</b>	<b>\$ 151,974,591</b>	<b>\$ 1,347,328,441</b>
Percentage of total by S. D.	18.4%	13.6%	35.2%	21.5%	11.3%	100.0%

**NOTES:**

- 1) For road and light rail projects, expenditures were apportioned by Supervisorial District based on the project's mileage of roadway or trackage within each district.
- 2) For Low Floor LRT Vehicles, expenditures were apportioned based on the system-wide mileage of LRT trackage within each supv. district.
- 3) Only the Measure expenditures are shown. Some projects were funded in part with non-Measure funds and thus their total cost is higher than the amount shown.

**2000 Measure A 1/2-cent Transit Improvement Program (30 yrs. effective April 1, 2006)**

<b>BART and Supporting Projects</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>Total</b>
BART SV Program Dev./Implementation	\$ -	\$ 53,600,000	\$ 77,720,000	\$ 2,680,000	\$ -	\$ 134,000,000
BART SV Corridor Est. & Maint. (CEM)	\$ -	\$ 123,960,000	\$ 179,742,000	\$ 6,198,000	\$ -	\$ 309,900,000
Berryessa Extension Project (SVBX)	\$ -	\$ -	\$ 1,135,300,000	\$ -	\$ -	\$ 1,135,300,000
Future Extension to Santa Clara (SVSX)	\$ -	\$ 1,413,581,000	\$ -	\$ 43,719,000	\$ -	\$ 1,457,300,000
Newhall Maintenance Facility	\$ -	\$ -	\$ -	\$ 500,000	\$ -	\$ 500,000
BART Core System Modifications (BCS)	\$ -	\$ 79,760,000	\$ 115,652,000	\$ 3,988,000	\$ -	\$ 199,400,000
Warm Springs Extension (VTA Share)	\$ -	\$ -	\$ 8,000,000	\$ -	\$ -	\$ 8,000,000
King Road BRT	\$ -	\$ 168,421	\$ 31,579	\$ -	\$ -	\$ 200,000
Mountain View Double Track	\$ -	\$ -	\$ -	\$ -	\$ 63,000,000	\$ 63,000,000
Santa Clara Pocket Track	\$ -	\$ -	\$ -	\$ 24,800,000	\$ -	\$ 24,800,000
BART Transit Integration Analysis	\$ -	\$ 80,000	\$ 116,000	\$ 4,000	\$ -	\$ 200,000
<b>SUBTOTAL BART (incl. supporting projs.)</b>	<b>\$ -</b>	<b>\$ 1,671,149,421</b>	<b>\$ 1,516,561,579</b>	<b>\$ 81,889,000</b>	<b>\$ 63,000,000</b>	<b>\$ 3,332,600,000</b>

NOTES:

1) For BART and supporting light rail projects, expenditures were apportioned by Supervisorial District based on the project's mileage of trackage within each district.

2) For general project costs such as BART Program Development and Implementation, costs were apportioned by Supervisorial District based on the mileage of BART trackage within the County at final build-out (i.e. all the way to Santa Clara).

3) Figures were obtained from the Oct. 2014 VTA document entitled "2000 Measure A Transit Improvement Program" from the column labeled "Estimated Cost - Measure A Portion". Where costs are shown "TBD", staff used the figure from the column labeled "Incurred Cost - Measure A Portion". As costs continue to be incurred, these figures will increase.



**2000 Measure A 1/2-cent Transit Improvement Program (30 yrs. effective April 1, 2006) (continued)**

<b>Other Projects</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>Total</b>
SJC Airport People Mover (APM)	\$ -	\$ -	\$ 100,000	\$ 100,000	\$ -	\$ 200,000
Capitol Expwy. LR Ext. (CELR) to Eastridge	\$ -	\$ 56,300,000	\$ -	\$ -	\$ -	\$ 56,300,000
CELR Phase I - Pedestrian Improvements	\$ -	\$ 3,000,000	\$ -	\$ -	\$ -	\$ 3,000,000
CELR Phase I - Eastridge Transit Center	\$ -	\$ 41,300,000	\$ -	\$ -	\$ -	\$ 41,300,000
CELR Phase II - LRT to Eastridge	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
70 Low-Floor Light Rail Vehicles	\$200,600,000 included in Debt Service line item below					\$ -
Caltrain South County Capacity Impr.	\$ 2,300,000	\$ -	\$ -	\$ -	\$ -	\$ 2,300,000
Caltrain Electrification (VTA Share)	\$ 30,037,000	\$ 9,195,000	\$ 5,517,000	\$ 4,291,000	\$ 12,260,000	\$ 61,300,000
Caltrain Impr. Plan/Service Upgrades	\$ 8,085,000	\$ 2,475,000	\$ 1,485,000	\$ 1,155,000	\$ 3,300,000	\$ 16,500,000
Caltrain Mountain View Parking Structure	\$ -	\$ -	\$ -	\$ -	\$ 200,000	\$ 200,000
Blossom Hill Pedestrian Grade Separation	\$ 1,600,000	\$ -	\$ -	\$ -	\$ -	\$ 1,600,000
Caltrain Safety Enhancements	\$ 13,132,000	\$ 4,020,000	\$ 2,412,000	\$ 1,876,000	\$ 5,360,000	\$ 26,800,000
Santa Clara Station Ped Underpass Ext.	\$ -	\$ -	\$ -	\$ 700,000	\$ -	\$ 700,000
Santa Clara/Diridon Station Upgrade	\$ -	\$ 6,100,000	\$ -	\$ 6,100,000	\$ -	\$ 12,200,000
Bike Sharing Pilot Project	\$ 147,000	\$ 45,000	\$ 27,000	\$ 21,000	\$ 60,000	\$ 300,000
Palo Alto Intermodal Transit Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
BRT Strategic Plan	\$ 300,000	\$ 300,000	\$ 300,000	\$ 300,000	\$ 300,000	\$ 1,500,000
Santa Clara-Alum Rock BRT	\$ -	\$ 25,000,000	\$ -	\$ -	\$ -	\$ 25,000,000
Stevens Creek BRT	\$ -	\$ -	\$ -	\$ 1,050,000	\$ 1,050,000	\$ 2,100,000
El Camino Real BRT	\$ -	\$ -	\$ 2,050,000	\$ 2,050,000	\$ 4,100,000	\$ 8,200,000
Procure BRT Articulated Buses	\$ 4,240,000	\$ 4,240,000	\$ 4,240,000	\$ 4,240,000	\$ 4,240,000	\$ 21,200,000
Mod. Chaboya/North Div. for BRT Buses	\$ 760,000	\$ 760,000	\$ 760,000	\$ 760,000	\$ 760,000	\$ 3,800,000
Money Counting Facility Replacement	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 100,000
Hwy. 17 Bus Service Improvements	\$ 1,250,000			\$ 1,250,000		\$ 2,500,000
Dumbarton Rail Corridor	\$ -	\$ -	\$ -	\$ -	\$ 2,300,000	\$ 2,300,000
3 Zero-Emission Buses (Pilot Program)	\$ 640,000	\$ 640,000	\$ 640,000	\$ 640,000	\$ 640,000	\$ 3,200,000
Zero-Emission Buses Facility Impr.	\$ 480,000	\$ 480,000	\$ 480,000	\$ 480,000	\$ 480,000	\$ 2,400,000
New Rail Corridors Study	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 700,000
Light Rail Systems Analysis	\$ 340,000	\$ 544,000	\$ 527,000	\$ 187,000	\$ 102,000	\$ 1,700,000
Southern Light Rail Express	\$ 400,000	\$ 400,000	\$ -	\$ 400,000	\$ -	\$ 1,200,000
LRT Extension to Vasona Junction	\$ 45,000	\$ -	\$ -	\$ 855,000	\$ -	\$ 900,000
Operating/Maint Bus, Rail, Paratransit	\$ 48,720,000	\$ 48,720,000	\$ 48,720,000	\$ 48,720,000	\$ 48,720,000	\$ 243,600,000
Debt Service	\$ 60,160,000	\$ 60,160,000	\$ 60,160,000	\$ 60,160,000	\$ 60,160,000	\$ 300,800,000
Fund Exchange Payments	\$ 17,520,000	\$ 17,520,000	\$ 17,520,000	\$ 17,520,000	\$ 17,520,000	\$ 87,600,000
Miscellaneous Operating Expenses	\$ 1,200,000	\$ 1,200,000	\$ 1,200,000	\$ 1,200,000	\$ 1,200,000	\$ 6,000,000
<b>SUBTOTAL OTHER</b>	<b>\$ 191,516,000</b>	<b>\$ 282,559,000</b>	<b>\$ 146,298,000</b>	<b>\$ 154,215,000</b>	<b>\$ 162,912,000</b>	<b>\$ 937,500,000</b>
<b>TOTAL MEASURE A</b>	<b>\$ 191,516,000</b>	<b>\$ 1,953,708,421</b>	<b>\$ 1,662,859,579</b>	<b>\$ 236,104,000</b>	<b>\$ 225,912,000</b>	<b>\$ 4,270,100,000</b>
<b>Percentage of total by S. D.</b>	<b>4.5%</b>	<b>45.8%</b>	<b>38.9%</b>	<b>5.5%</b>	<b>5.3%</b>	<b>100.0%</b>

NOTES:

1) For LRT and BRT projects, expenditures were apportioned by Supervisorial District based on the project's mileage of trackage or roadway within each district.

2) For system-wide LRT and Caltrain improvement projects, costs were apportioned by Supervisorial District based on the mileage of the respective system's total trackage within each district.

3) Figures were obtained from the Oct. 2014 VTA document entitled "2000 Measure A Transit Improvement Program" from the column labeled "Estimated Cost - Measure A Portion". Where costs are shown "TBD", staff used the figure from the column labeled "Incurred Cost - Measure A Portion". As costs continue to be incurred, these figures will increase.



## 2000 Measure A Transit Improvement Program

OCTOBER 2014 - REV

Project	Estimated Cost <sup>1</sup>		Incurred Cost <sup>2</sup>		Status	
	Total (in \$M)	Measure A Portion (in \$M)	Total (in \$M)	Measure A Portion (in \$M)		
<b>1 Extend BART from Fremont through Milpitas to Downtown San Jose and the Santa Clara Caltrain Station</b>						
2	BART SV Program Development and Implementation	\$259.0	\$134.0	\$244.4	\$120.6	Ongoing
3	BART SV Corridor Establishment and Maintenance (CEM)	\$457.9	\$309.9	\$387.9	\$274.8	
4	▪ Newhall Yard Property					Acquired
5	▪ Mitchell Block Parcel					Acquired
6	▪ Kato Road Grade Separation					Completed
7	▪ Mission/Warren/Freight Railroad Relocation (MWT)					Under Construction
8	▪ Lower Berryessa Creek Project (LBC)					Completed
9	▪ Montague Reconstruction Project (MRP)					Design/ROW
10	▪ Upper Penitencia Creek Trail Connector (UPC)					Design
<b>11 BART Silicon Valley Extension</b>						
12	▪ Berryessa Extension Project (SVBX)	\$2,421.3	\$1,135.3	\$799.6	\$229.2	Under Construction
13	▪ Future Extension to Santa Clara (SVSX) <sup>3</sup>	\$4,304.4	\$1,457.3	\$138.0	\$2.1	Under Development
14	▪ Newhall Maintenance Facility	\$388.3	\$0.5	\$25.9	\$0.5	Under Development
15	▪ BART Core System Modifications (BCS)	\$269.2	\$199.4	\$99.0	\$42.6	Ongoing
16	Warm Springs Extension (WSX) (VTA Share)	\$8.0	\$8.0	\$8.0	\$8.0	Under Construction
<b>17 Other Supporting Projects</b>						
18	▪ Berryessa BART Connector Design (King Road BRT)	TBD	TBD	\$0.2	\$0.2	Under Development
19	▪ Northern Light Rail Express (Mtn. View Double Track)	\$63.0	\$63.0	\$7.7	\$7.7	Design
20	▪ Santa Clara Pocket Track	\$24.8	\$24.8	\$9.7	\$9.7	Under Construction
21	▪ BART Transit Integration Analysis	\$0.2	\$0.2	\$0.1	\$0.1	Under Development
<b>22 Provide Connections from Mineta San Jose International Airport to BART, Caltrain and VTA Light Rail</b>						
23	San Jose Mineta Airport People Mover (APM)	TBD	TBD	\$2.0	\$2.0	Inactive <sup>4</sup>
<b>24 Extend Light Rail from Downtown San Jose to the East Valley</b>						
25	Capitol Expressway LR Extension (CELR) to Eastridge	\$62.2	\$56.3	\$62.2	\$56.3	Completed Design
26	CELR Phase I – Pedestrian Improvements	\$19.0	\$3.0	\$19.0	\$3.0	Completed
27	CELR Phase I – Eastridge Transit Center	\$70.3	\$41.3	\$41.3	\$26.7	Under Construction
28	CELR Phase II – LRT to Eastridge	\$256.0	TBD	\$0.0	\$0.0	Inactive <sup>5</sup>
<b>29 Purchase Low-Floor Light Rail Vehicles</b>						
30	70 Low-Floor Light Rail Vehicles	\$200.6	\$0.0	\$200.6	\$0.0 <sup>6</sup>	In Service
<b>31 Improve Caltrain: Double Track to Gilroy and Electrify from Palo Alto to Gilroy</b>						
32	Caltrain South County Capacity Improvements	\$17.2	\$2.3	\$17.2	\$2.3	Inactive <sup>7</sup>
33	Caltrain Electrification (VTA Share)	\$61.3	\$61.3	\$4.0	\$4.0	Under Development

<sup>1</sup> Current estimate as of October 2014.

<sup>2</sup> Incurred costs through June 30, 2014.

<sup>3</sup> Estimated Cost includes a 4-station, 6-mile project.

<sup>4</sup> Completed studies of Automated Transit Guideway system.

<sup>5</sup> Construction Phase Cost Estimate.

<sup>6</sup> Project funded through a Board approved fund exchange between Santa Clara County, VTA and Measure A. Measure A costs incurred for this item reflected as a portion of Debt Service (see page 2).

<sup>7</sup> Completed fiber optic cable relocation of the northern segment (5.3 miles).

continued on back





Project	Estimated Cost <sup>1</sup>		Incurred Cost <sup>2</sup>		Status
	Total (in \$M)	Measure A Portion (in \$M)	Total (in \$M)	Measure A Portion (in \$M)	
<b>34 Increase Caltrain Service</b>					
35 Caltrain Improvement Plan/Caltrain Service Upgrades	\$16.5	\$16.5	\$15.4	\$15.4	Under Development
36 Caltrain Mountain View Parking Structure	TBD	TBD	\$0.3	\$0.2	Inactive <sup>8</sup>
37 Blossom Hill Pedestrian Grade Separation	\$11.6	\$1.6	\$10.7	\$1.2	Completed
38 Caltrain Safety Enhancements	\$26.9	\$26.8	\$15.6	\$15.5	Completed Design
39 Santa Clara Station Pedestrian Underpass Extension	\$11.4	\$0.7	\$2.0	\$0.7	Completed Design
40 Santa Clara and San Jose Diridon Station Upgrade	\$12.2	\$12.2	\$12.2	\$12.2	Completed
41 Bike Sharing Pilot Project	\$0.9	\$0.3	\$0.8	\$0.2	In Service
<b>42 Construct a New Palo Alto Intermodal Transit Center</b>					
43 Palo Alto Intermodal Transit Center	TBD	TBD	\$0.2	\$0.0	Inactive <sup>9</sup>
<b>44 Improve Bus Service in Major Bus Corridors</b>					
45 BRT Alternative Analysis/BRT Strategic Plan	\$2.2	\$1.5	\$2.2	\$1.5	Completed
46 Santa Clara-Alum Rock Bus Rapid Transit	\$115.0	\$25.0	\$34.5	\$10.7	Under Construction
47 Stevens Creek Bus Rapid Transit	\$145.0	TBD	\$2.1	\$2.1	Planning
48 El Camino Real Bus Rapid Transit	\$250.0	TBD	\$8.2	\$8.2	Environmental
49 Procure BRT Articulated Buses	\$40.4	\$21.2	\$1.5	\$1.5	Procurement
50 Modifications of Chaboya and North Division for BRT Buses	\$3.8	\$3.8	\$0.2	\$0.2	Design
51 Money Counting Facility Replacement	\$0.1	\$0.1	\$0.1	\$0.1	Study Completed
<b>52 Upgrade Altamont Commuter Express (ACE)</b>					
53 Included in Santa Clara and San Jose Diridon Station Upgrade	—	—	— <sup>10</sup>	—	Completed
<b>54 Improve Highway 17 Express Bus Service</b>					
55 Highway 17 Bus Service Improvements	\$2.5	\$2.5	\$2.5	\$2.5	Completed
<b>56 Connect Caltrain with Dumbarton Rail Corridor</b>					
57 Dumbarton Rail Corridor	TBD	TBD	\$2.3	\$2.3	Inactive <sup>11</sup>
<b>58 Purchase Zero-Emission Buses and Construct Service Facilities</b>					
59 3 Zero-Emission Buses (Pilot Program)	\$14.7	\$3.2	\$14.7	\$3.2	Completed
60 Zero-Emission Buses Facility Improvements	\$4.8	\$2.4	\$4.8	\$2.4	Completed
<b>61 Develop New Light Rail Corridors</b>					
62 New Rail Corridors Study	TBD	TBD	\$0.7	\$0.7	Under Development
63 Light Rail Systems Analysis	\$1.7	\$1.7	\$1.7	\$1.7	Completed
64 Southern Light Rail Express	\$1.2	\$1.2	\$1.0	\$1.0	Completed
65 LRT Extension to Vasona Junction	\$176.0	TBD	\$0.9	\$0.9	Environmental
66 Fund Operating and Maintenance Costs for Increased Bus, Rail and Paratransit Service	TBD	TBD	\$243.6	\$243.6	Ongoing
<b>67 Other Expenditures</b>					
68 Debt Service (including principal, interest, & other bond costs)	—	—	\$300.8	\$300.8	Ongoing
69 Fund Exchange Payments <sup>12</sup>	—	—	\$87.6	\$87.6	Ongoing
70 Miscellaneous Operating Expenses	—	—	\$6.0	\$6.0	Ongoing
<b>71 TOTAL</b>			<b>\$2,839.6</b>	<b>\$1,512.2</b>	

<sup>8</sup> Completed conceptual design.

<sup>9</sup> Completed project studies.

<sup>10</sup> Included in Santa Clara and San Jose Diridon Station Upgrade.

<sup>11</sup> Completed preliminary design, ridership studies and conceptual estimates.

<sup>12</sup> Payments related to exchange of State Transportation Improvement Program (STIP) and Measure A funding approved by the Board in June 2007, December 2007, and November 2013.

Measure A Collected To Date  
(as of 6/30/14) = \$1.3B

Forecast Additional Through 2036 = \$6.1B



**1984 - 2008 Local Transportation Funding Measures  
Summary of Revenue and Expenditures by Supv. District**

Supv. District	Measure Expenditures by S.D. (\$ Million)				Total Expenditures by S.D. (incl. BART)		Total Expenditures by S.D. ( not incl. BART)		% of Sales Tax Generated by S.D.
	1984	1996	2000	2008					
1	\$ 457.0	\$ 248.0	\$ 191.5	\$ -	\$ 896.5	12.6%	\$ 896.5	25.7%	15.01%
2	\$ 37.0	\$ 183.6	\$ 1,953.7	\$ 128.3	\$ 2,302.6	32.3%	\$ 503.1	14.4%	18.42%
3	\$ 273.0	\$ 474.4	\$ 1,662.9	\$ 186.1	\$ 2,596.3	36.4%	\$ 893.7	25.6%	21.75%
4	\$ 160.4	\$ 289.4	\$ 236.1	\$ 6.4	\$ 692.3	9.7%	\$ 604.0	17.3%	28.46%
5	\$ 272.6	\$ 152.0	\$ 225.9	\$ -	\$ 650.5	9.1%	\$ 587.5	16.9%	16.35%
<b>TOTALS</b>	<b>\$ 1,200.0</b>	<b>\$ 1,347.3</b>	<b>\$ 4,270.1</b>	<b>\$ 320.8</b>	<b>\$ 7,138.2</b>	<b>100.0%</b>	<b>\$ 3,484.8</b>	<b>100.0%</b>	<b>100.0%</b>

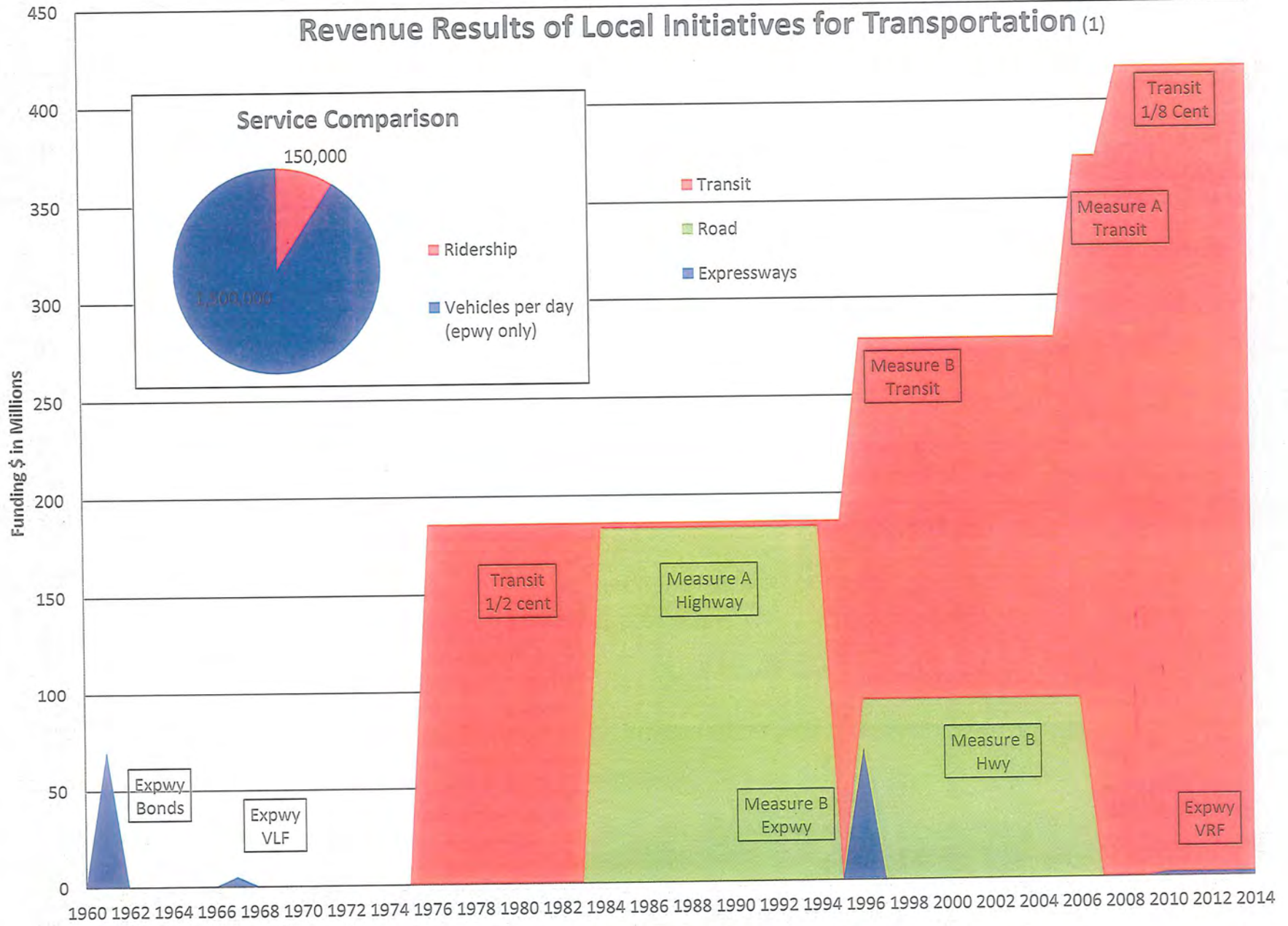
NOTES:

1) Figures are unadjusted for inflation.

2) Collection of the 1/8-cent sales tax authorized by the 2008 Measure B for future operation and maintenance of BART within Santa Clara County did not begin until July 1, 2012. The \$320.8 million shown is the estimated amount collected between July 1, 2012 and March 31, 2015. This amount was apportioned by Supervisorial District based on the mileage of BART trackage within the County at final build-out (i.e. all the way to Santa Clara).



# Revenue Results of Local Initiatives for Transportation (1)



**COUNTY OF SANTA CLARA ACTUAL DISTRIBUTION OF 1% BRADLEY BURNS SALES TAX BY SUPERVISORIAL DISTRICT 2005 - 2014**

S. D.	2014 (as of 9/30)		2013		2012		2011		2010		2009	
District 1	\$102,258,355	14.72%	\$138,142,955	14.74%	\$133,066,645	14.35%	\$128,279,280	14.64%	\$119,975,026	14.84%	\$115,668,072	15.31%
District 2	\$128,995,862	18.57%	\$171,688,280	18.32%	\$165,956,948	17.90%	\$161,510,255	18.44%	\$150,403,139	18.60%	\$142,709,190	18.89%
District 3	\$151,901,956	21.87%	\$201,588,401	21.51%	\$202,416,516	21.84%	\$193,602,251	22.10%	\$180,897,317	22.37%	\$162,283,478	21.48%
District 4	\$194,423,530	27.99%	\$266,092,185	28.40%	\$259,865,968	28.03%	\$244,654,804	27.93%	\$219,106,005	27.09%	\$209,476,315	27.73%
District 5	\$117,114,070	16.86%	\$159,532,368	17.03%	\$165,675,905	17.87%	\$148,022,259	16.90%	\$138,336,413	17.11%	\$125,254,657	16.58%
Total	\$694,693,774	100.00%	\$937,044,189	100.00%	\$926,981,982	100.00%	\$876,068,849	100.00%	\$808,717,901	100.00%	\$755,391,711	100.00%

(continued on next page)

NOTES:

1. The above data was provided by HdL Companies. According to HdL, each year between 15.6% and 17% of the local sales tax is allocated by the state with no situs address identified. HdL apportioned these tax proceeds by Supervisorial District in the same proportion as the "with address" allocations. For example, in Sunnyvale, the "no-address" tax proceeds were apportioned between District 3 and District 5 in the same proportions as the "with address" tax proceeds.

2. The above table demonstrates that the percentage of overall tax proceeds generated by each Supervisorial District varies little from year to year. The 10-year average for each district was thus assumed to represent the source of the sales tax proceeds for the 1984, 1996, 2000 and 2008 local sales tax measures.

S. D.	2008		2007		2006		2005		10-YEAR TOTALS	
District 1	\$129,197,536	14.61%	\$137,387,604	15.30%	\$135,951,272	15.71%	\$128,697,307	16.01%	\$1,268,624,051	<b>15.01%</b>
District 2	\$164,875,827	18.65%	\$164,150,137	18.28%	\$157,644,437	18.22%	\$148,470,094	18.47%	\$1,556,404,169	<b>18.42%</b>
District 3	\$196,335,927	22.20%	\$193,422,864	21.54%	\$183,516,970	21.21%	\$172,315,491	21.44%	\$1,838,281,172	<b>21.75%</b>
District 4	\$254,103,432	28.74%	\$258,839,475	28.82%	\$258,045,758	29.83%	\$240,495,458	29.92%	\$2,405,102,929	<b>28.46%</b>
District 5	\$139,713,572	15.80%	\$144,378,455	16.07%	\$130,009,880	15.03%	\$113,714,676	14.15%	\$1,381,752,256	<b>16.35%</b>
Total	\$884,226,293	100.00%	\$898,178,536	100.00%	\$865,168,317	100.00%	\$803,693,026	100.00%	\$8,450,164,576	<b>100.00%</b>

**SANTA CLARA COUNTY TRANSPORTATION SALES TAX BALLOT MEASURES:  
BY SUPERVISORIAL DISTRICT**

	% of Countywide Aye Vote	% of Project Funds Allocated	% of Annual Countywide Sales Tax <sup>1</sup>
<b>DISTRICT 1 (West Valley / South County / San Jose)</b>			
1984 Measure A	20.6%	38.1%	15.01%
1996 Measure B	22.0%	18.4	15.01%
2000 Measure A	21.8%	4.5% (20.4% of non-BART expenditures)	15.01%
2008 Measure B	21.6%	0.0% <sup>2</sup>	15.01%
<i>D1 % of Total Allocations (All Measures) Including BART</i>			12.6%
<i>D1 % of Total Allocations (All Measures) Excluding BART</i>			25.7%
<b>DISTRICT 2 (San Jose)</b>			
1984 Measure A	16.3%	3.1%	18.42%
1996 Measure B	12.7%	13.6%	18.42%
2000 Measure A	13.2%	45.8% (30.1% of non-BART expenditures)	18.42%
2008 Measure B	14.6%	40.0% <sup>2</sup>	18.42%
<i>D2 % of Total Allocations (All Measures) Including BART</i>			32.3%
<i>D2 % of Total Allocations (All Measures) Excluding BART</i>			14.4%
<b>DISTRICT 3 (San Jose / Milpitas / Sunnyvale)</b>			
1984 Measure A	16.9%	22.8%	21.75%
1996 Measure B	18.8%	35.2%	21.75%
2000 Measure A	19.9%	38.9% (15.6% of non-BART expenditures)	21.75%
2008 Measure B	18.6%	58.0% <sup>2</sup>	21.75%
<i>D3 % of Total Allocations (All Measures) Including BART</i>			36.4%
<i>D3 % of Total Allocations (All Measures) Excluding BART</i>			25.6%
<b>DISTRICT 4 (San Jose / Campbell / Santa Clara)</b>			
1984 Measure A	19.9%	13.4%	28.46%
1996 Measure B	20.6%	21.5%	28.46%
2000 Measure A	20.0%	5.5% (16.4% of non-BART expenditures)	28.46%
2008 Measure B	21.0%	2.0% <sup>2</sup>	28.46%
<i>D4 % of Total Allocations (All Measures) Including BART</i>			9.1%
<i>D4 % of Total Allocations (All Measures) Excluding BART</i>			16.9%
<b>DISTRICT 5 (North County / West Valley)</b>			
1984 Measure A	26.2%	22.7%	16.35%
1996 Measure B	25.8%	11.3%	16.35%
2000 Measure A	24.9%	5.3% (17.4% of non-BART expenditures)	16.35%
2008 Measure B	24.2%	0.0% <sup>2</sup>	16.35%
<i>D5 % of Total Allocations (All Measures) Including BART</i>			9.1%
<i>D5 % of Total Allocations (All Measures) Excluding BART</i>			16.9%

Prepared by Kris Zanardi, Policy Aide, Santa Clara County Supervisor S. Joseph Simitian; July 15, 2015.

Source of Data: SCC Roads and Airports Department Transportation Tax Information Memorandum to Board of Supervisors; March 31, 2015.

<sup>1</sup> From 2005-2014: (a) D1 generated an average of 15.01% of the annual sales tax collected in the County, with a "high" of 16.01% 2005 and a "low" of 14.35% in 2012; (b) D2 generated an average of 18.42% of the annual sales tax collected in the County, with a "high" of 18.65% generated in 2008 and a "low" of 17.90% in 2012; (c) D3 generated an average of 21.75% of the sales tax generated annually in the County, with a "high" of 22.37% generated in 2010 and a "low" of 21.20% generated in 2008; (d) D4 generated an average of 28.46% of the annual sales tax collected in the County, with a "high" of 29.92% generated in 2005 and a "low" of 27.09% generated in 2010; and (e) D5 generated an average of 16.35% of the annual sales tax collected in the County, with a "high" of 17.87% in 2012 and a "low" of 14.15% generated in 2005.

<sup>2</sup> 2008 Measure B 1/8 cent tax for future operation and maintenance of BART; collection began July 1, 2012. Estimated \$320.8m collected through March 31, 2015. Amount apportioned by SD based on mileage of BART track within the county at final build-out (i.e., all the way to Santa Clara).

**SANTA CLARA COUNTY TRANSPORTATION SALES TAX  
BALLOT MEASURES: SUMMARY DATA**

For the last two ballot measures, 79.6% of the revenues collected have been allocated for BART to San Jose:

<b>Measure</b>	<b>BART</b>	<b>Other</b>	<b>Total</b>
2008 Measure B	\$320,800,000		\$320,800,000 <sup>1</sup>
2000 Measure A	\$3,332,000,000	\$938,000,000	\$4,270,000,000
<b>Total</b>	<b>\$3,652,800,000</b>	<b>\$938,000,000</b>	<b>\$4,590,800,000</b>

<sup>1</sup>Estimate of amount collected between July 1, 2012, and March 31, 2015.

For the last three ballot measures, 61.5% of the revenues collected have been allocated for BART to San Jose:

<b>Measure</b>	<b>BART</b>	<b>Other</b>	<b>Total</b>
2008 Measure B	\$320,800,000		\$320,800,000 <sup>1</sup>
2000 Measure A	\$3,332,000,000	\$938,000,000	\$4,270,000,000
1996 Measure B		\$1,347,000,000	\$1,347,000,000
<b>Total</b>	<b>\$3,652,800,000</b>	<b>\$2,285,000,000</b>	<b>\$5,937,800,000</b>

<sup>1</sup>Estimate of amount collected between July 1, 2012, and March 31, 2015.