



## **A G E N D A**

### **Sacramento Transportation Authority Sacramento Abandoned Vehicle Service Authority (SAVSA)**

700 H Street, Suite 1450 • Sacramento, California • 95814  
(Board of Directors may participate via teleconference)

**WEDNESDAY**

**JULY 27, 2022**

**1:30 PM**

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Members: Rich Desmond (Vice Chair), Sue Frost, Eric Guerra, Jeff Harris, Patrick Kennedy, Rosario Rodriguez, Steve Miller, Don Nottoli, Paul Sandhu, Jay Schenirer, Phil Serna, Bobbie Singh-Allen (Chair), Kevin Spease, Donald Terry, Katie Valenzuela, Mai Vang

Alternates: Nick Avdis, Porsche Middleton, Shawn Farmer, Siri Pulipati, Mike Kozlowski, Darren Suen

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The Governing Boards of the Sacramento Transportation Authority (STA) and the Sacramento Abandoned Vehicle Service Authority (SAVSA) meet concurrently.

#### **PUBLIC COMMENT PROCEDURES**

In compliance with directives of the County, State, and Centers for Disease Control and Prevention (CDC), the meeting will be live stream and open to public attendance pursuant to health and safety guidelines. The practice of social distancing and wearing of face coverings (mask or shield) is recommended for the health and safety of all persons participating in person during the meeting although it is not required.

##### In-Person Public Comment

Speakers will be required to complete and submit a speaker request form to Clerk staff. The Chairperson will invite each individual to the podium to make a verbal comment.

##### Telephonic Public Comment

On the day of the meeting dial (916) 875-2500 to make a verbal public comment (follow the prompts for instructions). Refer to the agenda and listen to the live meeting to determine when is the best time to call to be placed in queue for a specific agenda item. Callers may be on hold for up to an extended period of time and should plan accordingly. When the

*Continued on back side →*

## **A G E N D A**

Sacramento Transportation Authority  
Sacramento Abandoned Vehicle Service Authority

**JULY 27, 2022**

Page 2 of 4

Chairperson opens public comment for a specific agenda item or off-agenda matter, callers will be transferred from the queue into the meeting to make a verbal comment. Each agenda item queue will remain open until the public comment period is closed for that specific item.

### Written Comment

Contact information is optional. Written communication is distributed, published and filed in the record.

- Send an email comment to [BoardClerk@saccounty.gov](mailto:BoardClerk@saccounty.gov). Include meeting date and agenda item number or off-agenda item.
- Mail a comment to 700 H Street, Suite 2450, Sacramento, CA 95814. Include meeting date and agenda item number or off-agenda item.

### **VIEW MEETING**

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### **MEETING MATERIAL**

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### **ACCOMMODATIONS**

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## **A G E N D A**

Sacramento Transportation Authority  
Sacramento Abandoned Vehicle Service Authority

**JULY 27, 2022**

Page 3 of 4

### CALL TO ORDER / ROLL CALL / PLEDGE OF ALLEGIANCE

### COMMENT ITEMS

1. Comments From The Public Regarding Matters Not On The Agenda
2. Executive Director's Report Kevin Bewsey

### CONSENT ITEMS

3. Approve Action Summary: June 1, 2022 Sacramento Transportation Authority (STA) Governing Board Meeting ◀ Jennifer Doll
4. Approve A Resolution Extending Assembly Bill No. 361 ◀ Kevin Bewsey

### CLOSED SESSION

5. California Government Code Sec. 54956.9(2)(d) William Burke  
CONFERENCE WITH LEGAL COUNSEL  
Title: Anticipated Litigation (One Potential Case)

### SEPARATE ITEMS

6. Submission Of The Citizens' Initiative Transportation Sales Tax Measure To The Electorate ◀ William Burke
7. Memorandum Of Understanding Regarding Implementation Of The "Sacramento County Transportation Maintenance, Safety And Congestion Relief Act Of 2022 - Retail Transactions And Use Tax" ◀ Kevin Bewsey
8. Senate Bill 1 Local Partnership Program (Competitive) Project Ranking Process And Call For Projects ◀ Kevin Bewsey

**A G E N D A**

Sacramento Transportation Authority  
Sacramento Abandoned Vehicle Service Authority

**JULY 27, 2022**

Page 4 of 4

9. Comments Of Authority Members

All

◀ *Denotes items that require Board action*

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Staff reports and associated materials are available online at [www.sacta.org](http://www.sacta.org). For assistance with agenda packets, please contact STA at (916) 323-0080 or [info@sacta.org](mailto:info@sacta.org). For questions regarding the agenda or any item on the agenda, please contact Kevin Bewsey at (916) 323-0080 or [kevin@sacta.org](mailto:kevin@sacta.org).



**July 27, 2022**

**AGENDA ITEM # 2**

**EXECUTIVE DIRECTOR'S REPORT**

Action Requested: Receive and File

Key Staff: Kevin M. Bewsey, Executive Director

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**New Executive Director**

Today is my first meeting as your Executive Director and am excited to work with all of you. I appreciate those who have taken the time talk with me and I look forward to more meetings in the future.

**Bond Refinancing**

At the June 1, 2022 STA Board Meeting, staff notified the Board that it was delaying refunding of the 2012 series bond due to anticipated staff changes in June. Since that time, those anticipated staff changes have been deferred and Tim Jones is delaying his departure to complete the bond refinancing effort and to assist in hiring and training a replacement.

**June 2022 Election**

STA received the final election results for Measure C on July 12, 2022. Measure C would have continued to fund the Vehicle Abatement Program administered under the Sacramento Abandoned Vehicle Service Authority (SAVSA). Since Measure C, is a specific fee it required a two-thirds voter approval to pass. While the Measure did receive a majority of the vote it did fail to meet the two-thirds voter approval requirement with a 57.7% voter approval.

**Local Partnership Program Update**

The Road Repair and Accountability Act of 2017 aka Senate Bill 1 (SB1) created the Local Partnership Program (LPP). This program is continuously appropriated two hundred million dollars (\$200,000,000) annually to be allocated by the California Transportation Commission for local or regional transportation agencies like STA that have sought and received voter approval of transportation taxes or that have imposed fees. This funding is distributed both formulaically through STA and as a competitive program.

The STA and Professional Advisory Group (PAG) have met several times over the past 12 months to discuss both the formulaic distribution and potential competitive applications that will be submitted through STA. This work has been done to develop proposed recommendations to present to the STA Governing Board. The SB 1 Local Partnership Program (Competitive) item is on Today's agenda and the SB 1 Local Partnership Program (Formulaic) item is anticipated for the August 11, 2022 meeting.



**JULY 27, 2022**

**AGENDA ITEM # 3**

**APPROVE ACTION SUMMARY: JUNE 1, 2022 STA GOVERNING BOARD MEETING**

Action Requested: Approve

Key Staff: Jennifer Doll, Special Programs Manager

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**Recommendation**

Approve the attached Action Summary of the June 1, 2022 meeting of the STA Governing Board.

*Attachment*

1. June 1, 2022 Action Summary



**ACTION SUMMARY**  
**SACRAMENTO TRANSPORTATION AUTHORITY**  
**SACRAMENTO ABANDONED VEHICLE SERVICE AUTHORITY**  
**VIA TELECONFERENCE**  
**700 "H" STREET - SUITE 1450**  
**SACRAMENTO, CALIFORNIA 95814**

**WEDNESDAY**

**JUNE 1, 2022**

**1:30 PM**

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Members: Rich Desmond, Sue Frost, Eric Guerra, Jeff Harris, Patrick Kennedy, Mike Kozlowski, Steve Miller, Don Nottoli (Chair), Paul Sandhu, Jay Schenirer, Phil Serna, Bobbie Singh-Allen, Kevin Spease, Donald Terry, Katie Valenzuela (Vice Chair), Mai Vang

(Members Rodriguez, Miller and Serna were not present)

Alternates: Nick Avdis, Porsche Middleton, Shawn Farmer, Rosario Rodriguez, Darren Suen

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**In-Person Public Comment**

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**Live Meeting comment**

Make a verbal public comment during a meeting. The public comment phone line will open 15 minutes prior to the start of the meeting. Refer to the agenda and listen to the live meeting to determine when is the best time to call to be placed in queue to make a public comment. Callers may be on hold

for up to an extended period of time and should plan accordingly. Dial (916) 875-2500 and follow the prompts to be placed in queue for a specific agenda item or off-agenda matter. When the Chair opens public comment for a specific agenda item or off-agenda matter, callers will be transferred from the queue into the meeting to make a verbal comment. Each agenda item queue will remain open until the public comment period is closed for the specific item.

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- Written comments are distributed to members, filed in the record, and will not be read aloud.

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**CALL TO ORDER / ROLL CALL / PLEDGE OF ALLEGIANCE**

**COMMENT ITEMS**

**1. Comments From The Public Regarding Matters Not On The Agenda**

1:35 PM Board Action: No public comments were made.

**2. Executive Director's Report**

1:35 PM Board Action: Executive Director Sabrina Drago provided an update regarding discussions with County staff to fulfill the financial duties of the Authority until the new Executive Director starts, the departure of Chief Financial Officer Timothy Jones and the extension of her resignation date to June 30, 2022, one meeting being added to the STA meeting calendar, and reported the vacancy on the Independent Taxpayer Oversight Committee.

**CONSENT ITEMS**

1:39 PM Board Action: Jeff Harris/ Eric Guerra - Approved the Consent Matters, Items 3 through 7, as recommended.

AYES: Rich Desmond, Sue Frost, Eric Guerra, Jeff Harris, Patrick Kennedy, Don Nottoli, Paul Sandhu, Jay Schenirer, Bobbie Singh-Allen, Kevin Spease, Katie Valenzuela, Mai Vang, Donald Terry

NOES: (None)

ABSTAIN: (None)

ABSENT: Steve Miller, Phil Serna, Rosario Rodriguez

RECUSAL:(None)

(PER POLITICAL REFORM ACT (§ 18702.5.))

**3. Approve Action Summary: May 12, 2022 Sacramento Transportation Authority (STA) Governing Board Meeting**

1:39 PM Board Action: Approved as recommended.

**4. Approve A Resolution Extending Assembly Bill No. 361**

1:39 PM Board Action: Approved by Resolution No. **STA 22-0006.**

**5. Adopt Appropriations Limit For Fiscal Year 2022-23**

1:39 PM Board Action: Approved by Resolution No. **STA 22-0007.**

**6. Delay Refunding Of The 2012 Series Bonds Until a Later Date**

1:39 PM Board Action: Received and filed the report.

**7. Approve Amendments To Current SacMetro Freeway Service Patrol Zone 5 And Zone 6 Contracts**

1:39 PM Board Action: Approved as recommended.

**SEPARATE ITEMS**

**8. Adopt Final STA Budget For Fiscal Year 2022-23 (Continued From May 12, 2022; Item No. 6)**

1:40 PM Board Action: Don Nottoli/ Donald Terry - Chief Financial Officer Timothy Jones introduced the final STA budget for Fiscal Year 2022-23. The Board closed the public hearing continued from May 12, 2022 and approved the Fiscal Year 2022-23 budget by Resolution No. **STA 22-0008**.

AYES: Rich Desmond, Sue Frost, Eric Guerra, Jeff Harris, Patrick Kennedy, Don Nottoli, Paul Sandhu, Jay Schenirer, Bobbie Singh-Allen, Kevin Spease, Katie Valenzuela, Mai Vang, Donald Terry

NOES: (None)

ABSTAIN: (None)

ABSENT: Steve Miller, Phil Serna, Rosario Rodriguez

RECUSAL:(None)

(PER POLITICAL REFORM ACT (§ 18702.5.))

**9. Comments Of Authority Members**

1:47 PM Board Action: No member comments were made.

**6. Delay Refunding Of The 2012 Series Bonds Until a Later Date**

1:39 PM Board Action: Received and filed the report.

**7. Approve Amendments To Current SacMetro Freeway Service Patrol Zone 5 And Zone 6 Contracts**

1:39 PM Board Action: Approved as recommended.

**SEPARATE ITEMS**

**8. Adopt Final STA Budget For Fiscal Year 2022-23 (Continued From May 12, 2022; Item No. 6)**

1:40 PM Board Action: Don Nottoli/ Donald Terry - Chief Financial Officer Timothy Jones introduced the final STA budget for Fiscal Year 2022-23. The Board closed the public hearing continued from May 12, 2022 and approved the Fiscal Year 2022-23 budget by Resolution No. **STA 22-0008**.

AYES: Rich Desmond, Sue Frost, Eric Guerra, Jeff Harris, Patrick Kennedy, Don Nottoli, Paul Sandhu, Jay Schenirer, Bobbie Singh-Allen, Kevin Spease, Katie Valenzuela, Mai Vang, Donald Terry

NOES: (None)

ABSTAIN: (None)

ABSENT: Steve Miller, Phil Serna, Rosario Rodriguez

RECUSAL:(None)

(PER POLITICAL REFORM ACT (§ 18702.5.))

**9. Comments Of Authority Members**

1:47 PM Board Action: No member comments were made.

**CLOSED SESSION**

- 10. California Government Code Sec. 54957.1(b)(1)  
STA PERSONNEL MATTERS  
Title: Appointment Of Sacramento Transportation  
Authority Executive Director**

2:26 PM Board Action: Approved the appointment of Kevin Bewsey as the STA Executive Director by Resolution No. **STA 22-0009** and rescinded Resolution No. STA 22-0002 temporarily designating the Executive Director as a part-time position for one year.

Adjourned at 2:27 p.m.

Respectfully Submitted,

DORELLE JOHNSON, Deputy Clerk  
Sacramento Transportation Authority/  
Sacramento Abandoned Vehicle Service Authority



**JULY 27, 2022**

**AGENDA ITEM # 4**

**APPROVE EXTENDING ASSEMBLY BILL NO. 361**

Action Requested: Approve Staff Recommendations

Key Staff: Kevin M. Bewsey, Executive Director

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**Recommendations**

Approve implementation of AB361 allowing virtual meetings to continue.

**Background**

A series of executive orders, starting in March 2020 and the most recent expiring September 30, 2021, the Governor's office waived all physical-presence requirements under the Brown Act as a means of limiting the spread of COVID-19. On September 16, Governor Newsom signed into law AB 361, extending the authority of public agencies to conduct meetings by teleconference, including video conference, during the COVID-19 pandemic.

On September 28, 2021, Sacramento County Public Health Officer, Dr. Olivia Kasirye, issued a memorandum recommending utilizing teleconferencing for public meetings as a form of COVID-19 prevention.

**Discussion**

Every 30 days the STA Governing Board must reconsider the continuing need for virtual meetings. If a majority of the members of a legislative body do not adopt these findings, then traditional Brown Act rules apply.

*Attachment(s)*

SACRAMENTO TRANSPORTATION AUTHORITY

RESOLUTION NO. \_\_\_\_\_

**RESOLUTION OF THE SACRAMENTO TRANSPORTATION AUTHORITY  
AUTHORIZING REMOTE TELECONFERENCE MEETINGS  
FOR THE PERIOD THROUGH AUGUST 1, 2022  
PURSUANT TO THE RALPH M. BROWN ACT**

**WHEREAS**, all meetings of SACRAMENTO TRANSPORTATION AUTHORITY and its legislative bodies are open and public, as required by the Ralph M. Brown Act (California Government Code § 54950 et seq); and

**WHEREAS**, on March 4, 2020, Governor Newsom issued a Proclamation of a State of Emergency declaring a state of emergency exists in California due to the threat of COVID-19, pursuant to the California Emergency Services Act (Government Code section 8625); and

**WHEREAS**, on March 17, 2020, Governor Newsom issued Executive Order N-29-20 that suspended the teleconferencing rules set forth in the Brown Act, provided certain requirements were met and followed; and,

**WHEREAS**, on June 11, 2021, Governor Newsom issued Executive Order N-08-21 that clarified the suspension of the teleconferencing rules set forth in the Brown Act, and further provided that those provisions would remain suspended through September 30, 2021; and

**WHEREAS**, on September 16, 2021, Governor Newsom signed AB 361 that allows a legislative body subject to the Brown Act to continue to meet without fully complying with the teleconferencing rules in the Brown Act provided the legislative body make certain findings; and

**WHEREAS**, as amended by AB 361, Government Code section 54953(e),

makes provisions for remote teleconferencing participation in meetings by members of a legislative body, without compliance with the requirements of Government Code section 54953(b)(3), subject to the existence of certain conditions and requirements; and

**WHEREAS**, a required condition of Government Code section 54953(e) is that a state of emergency is declared by the Governor pursuant to Government Code section 8625, proclaiming the existence of conditions of disaster or of extreme peril to the safety of persons and property within the state caused by conditions as described in Government Code section 8558(b); and

**WHEREAS**, a further required condition of Government Code section 54953(e) is that state or local officials have imposed or recommended measures to promote social distancing, or, the legislative body holds a meeting to determine or has determined by a majority vote that meeting in person would present imminent risks to the health and safety of attendees; and

**WHEREAS**, as of the date of this Resolution, the Proclamation of a State of Emergency remains in effect as neither the Governor nor the state Legislature have exercised their respective powers pursuant to Government Code section 8629 to lift the state of emergency either by proclamation or by concurrent resolution the state Legislature; and

**WHEREAS**, the California Department of Industrial Relations has issued regulations related to COVID-19 Prevention for employees and places of employment. Title 8 of the California Code of Regulations, Section 3205(5)(D) specifically recommends physical (social) distancing as one of the measures to decrease the spread of COVID-19 based on the fact that particles containing the virus can travel more than six feet, especially indoors; and

**WHEREAS**, on September 28, 2021, the Sacramento County Public Health Officer Dr. Olivia Kasirye issued a Teleconference Recommendation which states that utilizing teleconference options for public meetings is an effective and recommended

social distancing measure to facilitate participation in public affairs and encourage participants to protect themselves and other from COVID-19; and

**WHEREAS**, SACRAMENTO TRANSPORTATION AUTHORITY the has an interest in encouraging public participation in open and public meetings while protecting the health, safety and welfare of those who participate.

**NOW, THEREFORE, BE IT RESOLVED**, by the SACRAMENTO TRANSPORTATION AUTHORITY as follows:

1. **State or Local Officials Have Imposed or Recommended Measures to Promote Social Distancing.** SACRAMENTO TRANSPORTATION AUTHORITY hereby finds and proclaims that state and local officials have imposed or recommended measures to promote social (physical) distancing based on the California Department of Industrial Relations' issuance of regulations related to COVID-19 Prevention through Title 8 of the California Code of Regulations, Section 3205(5)(D) and Sacramento County Public Health Officer Dr. Olivia Kasirye's Teleconference Recommendation issued September 28, 2021.

2. **Remote Teleconference Meetings.** SACRAMENTO TRANSPORTATION AUTHORITY and any of its legislative bodies are hereby authorized to conduct open and public meetings in accordance with Government Code section 54953(e) and other applicable provisions of the Brown Act, and Staff are directed to take all actions necessary to carry out the intent and purpose of this Resolution.

3. **Effective Date.** This Resolution shall take effect immediately upon its adoption and shall be effective until the earlier of (i) August 26, 2022 or (ii) such time the Authority adopts a subsequent resolution in accordance with Government Code section 54953(e)(3) to extend the time during which it and its legislative bodies may continue to teleconference without compliance with Section 54953(b)(3).



On a motion by [Member] \_\_\_\_\_, seconded by [Member] \_\_\_\_\_, the foregoing Resolution was passed and adopted by the [Governing Board of the Sacramento Transportation Authority at a regular meeting thereof this \_\_\_\_\_ day of \_\_\_\_\_ 202\_, by the following vote, to wit:

AYES: [Members],

NOES: [Members],

ABSENT: [Members],

ABSTAIN: [Members],

RECUSAL: [Members],  
(PER POLITICAL REFORM ACT (§ 18702.5.)

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Chair of the Governing  
Body of the Sacramento  
Transportation Authority

(SEAL)

ATTEST: \_\_\_\_\_  
Clerk of the Governing Board of the  
Sacramento Transportation Authority



**JULY 27, 2022**

**AGENDA ITEM # 6**

**SUBMISSION OF CITIZENS' INITIATIVE TRANSPORTATION SALES TAX MEASURE TO ELECTORATE**

Action Requested: Submit Citizens' Initiative to Voters, Approve Resolution

Key Staff: William Burke, Legal Counsel

**Recommendation**

Staff and counsel recommend the STA Governing Board submit the ordinance, without alteration, to the voters.

**Background**

On June 10, 2022, a citizens' group known as "A Committee For A Better Sacramento" ("the Committee") filed an initiative petition and signatures with the Sacramento County Department of Voter Registration & Elections (VRE) for a local ballot measure called the "Sacramento County Transportation, Maintenance, Safety and Congestion Relief Act of 2022 - Retail Transactions and UseTax" Initiative (herein, "the Initiative"). The Committee proposes and has drafted the Initiative as an STA ordinance. See attachment 1 for the ordinance.

**Discussion**

On July 12, 2022, VRE determined that the Initiative "qualifies for election". VRE then forwarded the certification documents to the County/STA Clerk, see attachment 2.

Pursuant to the California Elections Code, once VRE has certified a local initiative measure, it "shall certify the results of the examination to the governing board of the district at the next regular meeting of the board." (Elections Code, § 9308(e).)

Thereafter, the "district board" (here, the STA Governing Board) is required to do either of the following:

(1) Adopt the ordinance, without alteration, either at the regular meeting at which the certification of the petition is presented, or within 10 days after it is presented.

OR

(2) Submit the ordinance, without alteration, to the voters pursuant to Section 1405.

(Elections Code, § 9310.)

It is unlikely that option (1) is a viable option because the Initiative includes a special tax, which requires a public vote. Thus, staff and counsel recommend that the STA Governing Board act to

carry out option (2), which is a ministerial task to submit the ordinance, without alteration, to the electorate. See attachment 2

STA staff recommends that the STA Governing Board act to carry out option (2), which is a ministerial task to submit the ordinance, without alteration, to the voters pursuant to Section 1405 of the Election Code.

Attachment(s)

1. Resolution Submitting Initiative To Voters
  - a. Initiative Ordinance
  - b. VRE ballot qualification documents

SACRAMENTO TRANSPORTATION AUTHORITY

RESOLUTION NO. \_\_\_\_\_

**A RESOLUTION OF THE GOVERNING BODY OF THE SACRAMENTO  
TRANSPORTATION AUTHORITY SUBMITTING THE “SACRAMENTO  
COUNTY TRANSPORTATION, MAINTENANCE, SAFETY AND CONGESTION  
RELIEF ACT OF 2022 - RETAIL TRANSACTIONS AND USE TAX” CITIZENS’  
INITIATIVE TO THE VOTERS.**

**WHEREAS**, the Sacramento Transportation Authority (STA), a California local transportation authority, exists under the authority of Section 180000 et seq. of the California Public Utilities Code; and

**WHEREAS**, an independent citizens’ group known as “A Committee For A Better Sacramento” (“the Committee”) drafted and circulated an initiative petition and signatures for a local ballot Initiative called the “Sacramento County Transportation, Maintenance, Safety and Congestion Relief Act of 2022 - Retail Transactions and Use Tax” (herein, “the Initiative”); and

**WHEREAS**, on June 10, 2022, the Committee filed the Initiative petition and required signatures with the Sacramento County Department of Voter Registration & Elections (VRE); and

**WHEREAS**, the Committee drafted the Initiative as an STA ordinance; and

**WHEREAS**, On July 12, 2022, VRE determined that the Initiative “qualifies for election” and forwarded the certification documents to the STA Clerk; and

**WHEREAS**, the Initiative is attached hereto as Attachment 1a; and

**WHEREAS**, VRE’s certification documents are attached hereto as Attachment 1b.

**NOW, THEREFORE, BE IT RESOLVED** that the Sacramento Transportation Authority hereby:

1. Submits the Initiative ordinance, without alteration, to the voters pursuant to Section 9310 of the California Elections Code.
2. Requests, pursuant to Section 10403 of the California Elections Code, that the County Board of Supervisors consolidate the district election with the November 8, 2022 statewide election.
3. Sets forth the form of the question to be voted upon as follows:  
“Shall the measure approving the Sacramento County Transportation, Maintenance, Safety and Congestion Relief Act of 2022 - Retail Transactions and Use Tax Initiative, including a 40-year 0.5% sales tax raising an estimated \$212,512,500 annually for transportation and transit projects, be adopted?”
4. Acknowledges that the consolidated election will be held and conducted in the manner prescribed in Section 10418 of the Elections Code.
5. Authorizes the STA Executive Director to take any and all actions necessary to carry out the intent and purpose of this Resolution, including conveying copies of this Resolution to the Board of Supervisors and VRE.

On a motion by [Member] \_\_\_\_\_, seconded by [Member] \_\_\_\_\_, the foregoing Resolution was passed and adopted by the Governing Board of the Sacramento Transportation Authority at a regular meeting thereof this \_\_\_\_\_ day of \_\_\_\_\_ 202\_, by the following vote, to wit:

AYES: [Members],  
NOES: [Members],  
ABSENT: [Members],

ABSTAIN: [Members],

RECUSAL: [Members],  
(PER POLITICAL REFORM ACT (§ 18702.5.))

---

Chair of the Governing  
Body of the Sacramento  
Transportation Authority

(SEAL)

ATTEST: \_\_\_\_\_  
Clerk of the Governing Board of the  
Sacramento Transportation Authority

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

To the Governing Board of the Sacramento Transportation Authority:

We, the undersigned, registered, qualified voters of the special district known as the Sacramento Transportation Authority, hereby propose an initiative ordinance adopting a one-half of one percent (0.500%) retail transactions and use tax dedicated for transportation in Sacramento County, and petition the Board to submit the same to the voters of the district for their adoption or rejection at the next succeeding regular county election or at any special election held prior to that regular election or as otherwise provided by law. The proposed ordinance (full title and text of the measure) read as follows:

**The People of the special district known as the Sacramento Transportation Authority do ordain as follows:**

### Section I. TITLE.

This initiative ordinance shall be known as the Sacramento County Transportation Maintenance, Safety, and Congestion Relief Act of 2022—Retail Transactions and Use Tax (the “Measure”).

### Section II. FINDINGS AND PURPOSE.

#### A. Findings.

1. The Sacramento Transportation Authority (the “Authority”), created pursuant to California Public Utilities Code § 180050, is authorized to levy a retail transactions and use tax in the incorporated and unincorporated territory of Sacramento County to fund transportation improvements and operations pursuant to California Public Utilities Code §§ 180200 et seq. and California Revenue and Taxation Code §§ 7251 et seq. Pursuant to applicable law, taxes proposed by initiative and adopted pursuant to these provisions shall be effective if approved by a majority of electors voting on the Measure.

2. Accordingly, this Measure provides for the adoption of a retail transactions and use tax for local transportation purposes of one-half of one percent (0.500%) on the sale and/or use of all tangible personal property sold at retail in the incorporated and unincorporated territory of Sacramento County (the “District”) beginning April 1, 2023, and continuing for a period of forty (40) years.

3. This one-half of one percent (0.500%) retail transactions and use tax is statutorily dedicated for transportation planning, design, construction, management, operations, and maintenance in Sacramento County, and cannot be used for other governmental purposes or programs. This Measure includes specific safeguards to ensure that revenues from the one-half of one percent (0.500%) retail transactions and use tax are used only to fund the transportation projects and services set forth in the Sacramento County Transportation Retail Transactions and Use Tax Expenditure Plan 2023 – 2063 (the “Expenditure Plan”), which is attached hereto as Exhibit A.

4. This Measure includes an Expenditure Plan, which identifies projects and programs that will maintain and improve the quality of life in Sacramento County, and are intended to accomplish the following goals:

- a. Provide a multi-modal transportation system that addresses the needs of all Sacramento County residents and provides capacity for planned and approved population and employment growth;
- b. Maintain and rehabilitate the County’s street and road system, improve existing local roadway conditions for motorists, and maximize previous infrastructure investment by supporting a more efficient transportation system that better connects the existing network to development along roadway and transit corridors;
- c. Help eliminate roadway fatalities and severe injuries and improve health outcomes by making streets, transit, and bicycle and pedestrian facilities safer, and increasing access to physical activity;
- d. Reduce traffic congestion, reduce bottlenecks, and make the County’s transportation system operate more efficiently and effectively;
- e. Expand rail and bus service, improve system connectivity, provide better mobility options for our students and aging population, and make public transportation faster, safer, cleaner, and more accessible, convenient, frequent, reliable, and affordable;
- f. Improve air quality, reduce greenhouse gas emissions, and support local and state climate goals;
- g. Create jobs, generate local economic benefits, and encourage a stronger local economy that attracts greater private investment and sustains a larger and more diversified job base;
- h. Provide investment in the County’s entire transportation network and integrate the capacity and benefits of all modes, including highways, bus and rail transit, streets and roads, rideshare options, and active transportation;
- i. Distribute funding to address the transportation investment priorities of the incorporated cities and unincorporated County areas in a geographically and socially equitable manner and provide mobility options for all County residents;
- j. Improve the ability of all local jurisdictions and agencies to leverage regional, state, and federal transportation funding programs with the objective to provide a match of at least one-third of the total cost of

each of the capital projects programmed in the Expenditure Plan;

k. Adopt an Expenditure Plan that is acceptable to the voters of Sacramento County; and

l. Provide flexibility for future allocations of funding to meet changing needs while maintaining program commitments to the voters.

5. In addition to the Expenditure Plan, this Measure includes mandatory taxpayer safeguards, which are set forth in Section V and Exhibit B of this Measure, and include:

a. An Independent Taxpayer Oversight Committee (“ITOC”) to supervise fiscal and performance audits regarding the use of the retail transactions and use tax revenues and to provide for independent review to ensure that all affected funds are spent in accordance with the provisions of the Expenditure Plan and Measure; and

b. A requirement that the Authority conduct a mandatory Expenditure Plan review every 10 years to ensure that the program reflects contemporary community needs in light of changing demographics, technology, and revenue estimates. Further, with limited exceptions, the Expenditure Plan can only be modified following a public review process and upon the approval of the Sacramento County Board of Supervisors with affirmation by the city councils of a majority of the incorporated cities in the County representing two-thirds of the incorporated area population.

6. To ensure that the tax adopted by this Measure provides maximum benefit to taxpayers, it is the intent of the voters that revenue generated by this tax shall not be used to supplant existing transportation funding programs, and that the County and the cities continue to impose all currently applicable local transportation impact fees. The voters expressly acknowledge that, although the Sacramento County Transportation Mitigation Fee Program (“SCTMFP”) is set to expire April 1, 2039, it is anticipated that the Authority will act in the future to extend that fee program so that it runs concurrently with the life of this tax (i.e., until 2063).

7. Voters also hereby find that, although an existing one-half of one percent (0.500%) retail transactions and use tax was adopted by County voters in 2004, went into effect in April of 2009, and is set to expire in March 2039 (the “Existing Tax”), this Measure is needed for several reasons:

a. New transportation technology will provide opportunities to streamline travel and traffic and to reduce greenhouse gas emissions, and this Measure will enhance the ability to take advantage of these opportunities.

b. Despite recent revenue increases, the gap between transportation needs and available funding is significant and continues to grow. This Measure will provide additional local funding to keep needed services in place and help alleviate congestion by improving the ability to attract funding from other sources to build, expand, and rehabilitate the County’s transportation infrastructure.

c. As Sacramento County’s population is growing and mobility needs are expanding, demand on the County’s roads, highways, and transit systems is also increasing. Additional investments are necessary to maintain and improve the current transportation system to ensure it can effectively accommodate growth and prepare the system for the future.

d. In addition to maintaining our existing system, increasing the development of alternative ways to get around, such as transit, walking, and biking, will require additional resources to be successful.

e. As our population ages and we continue to face the need for sustaining transportation options for lower income residents, we need to provide mobility services and the ability to help maintain a decent quality of life for all our citizens.

f. The Existing Tax has provided a substantial share of the funding available for transportation projects in Sacramento County, but we continue to rely on state and federal sources for major projects. The availability of local funding is imperative to attract and supplement those outside sources.

8. This Measure also includes provisions to: (a) better ensure that our local tax dollars are held in local banks; and (b) require that building and construction contracts involving over one million dollars in Measure funds use a skilled and trained workforce.

9. Pursuant to state law, the retail transactions and use tax adopted by this Measure is, to the greatest degree possible, fully consistent with the provisions of Part 1.6 of Division 2 of the Revenue and Taxation Code, which will minimize the cost of collecting the retail transactions and use tax, and at the same time, minimize the burden of record keeping

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

upon persons subject to taxation under the provisions of this Measure. As such, the tax can be administered and collected by the California Department of Tax and Fee Administration (“CDTFA”) in a manner that adapts itself as fully practicable to, and requires the least possible deviation from, the existing California statutory and administrative procedures followed by the CDTFA in administering and collecting the California State Sales and Use Taxes.

10. To further the Measure’s purpose of funding local transportation improvements, this Measure also authorizes the Authority to sell or issue, from time to time, on or before the collection of taxes, bonds or other evidence of indebtedness, in the aggregate principal amount at any one time outstanding of not to exceed the estimated proceeds of the tax, for the purpose of funding the transportation projects and purposes described in this Measure, including the Expenditure Plan.

### B. Purpose.

The purpose of this Measure is to fund local transportation improvements pursuant to the Expenditure Plan adopted by this Measure by adopting a one-half of one percent (0.500%) retail transactions and use tax in the incorporated and unincorporated areas of Sacramento County and authorizing the Authority to sell or issue bonds or other evidence of indebtedness in the aggregate principal amount at any one time outstanding of not to exceed the estimated proceeds of the tax.

### Section III. DEFINITIONS.

For the purposes of this Measure, the following terms shall be defined as follows:

“Expenditure Plan” means the Sacramento County Transportation Retail Transactions and Use Tax Expenditure Plan 2023 – 2063 (attached hereto as Exhibit A and adopted as part of this Measure) including any future amendments thereto.

“County” means the County of Sacramento.

“Authority” or “District” means the Sacramento Transportation Authority, a countywide special district formed under the Local Transportation Authority and Improvement Act, commencing at Section 180000 of the California Public Utilities Code.

“Existing Tax” means the one-half of one percent (0.500%) retail transactions and use tax adopted by County voters in 2004 and implemented in 2009, which is set to expire in 2039.

“Measure” means this Sacramento County Transportation Maintenance, Safety, and Congestion Relief Act of 2022—Retail Transactions and Use Tax.

“Net Revenue” means total estimated revenue available for allocation after deduction of collection costs of the California Department of Tax and Fee Administration (“CDTFA”), setting aside the cost of Authority administration and providing direct allocations for “off the top” expenditures expressly prescribed in the Expenditure Plan.

“Implementing Agency” means an agency or jurisdiction receiving tax revenues pursuant to this Measure and which has responsibility for delivering projects and meeting performance standards under the Expenditure Plan. These agencies/jurisdictions will be required to undergo regular fiscal audits to ensure compliance with this Measure, including but not limited to the Expenditure Plan. Notwithstanding any other provisions of this Measure and the Expenditure Plan, all Implementing Agencies will be subject to the same accountability and reporting requirements and will receive equitable treatment in the application of other statutory and regulatory processes.

“Program Period” means the 40-year period during which the tax is imposed and collected by this Measure.

### Section IV. RETAIL TRANSACTIONS AND USE TAX.

#### A. Imposition of Retail Transactions and Use Tax.

Upon voter approval, a retail transactions and use tax for transportation purposes (the “tax”) at the rate of one-half of one percent (0.500%) for forty (40) years beginning April 1, 2023, shall be imposed in the incorporated and unincorporated territory of the County of Sacramento. The tax shall be imposed by the Authority in accordance with Part 1.6 (commencing with Section 7251) of Division 2 of the California Revenue Taxation Code. This tax shall be in addition to any other taxes authorized by law, including the Existing Tax and any other existing or future state or local sales tax or retail transactions and use taxes. The tax shall be imposed as follows:

1. **Transactions Tax.** For the privilege of selling tangible personal property at retail, a tax is hereby imposed upon all retailers in the incorporated and unincorporated territory of the District at the rate of 0.500% of the gross receipts of any retailer from the sale of all tangible personal property sold at retail in said territory on and after the operative

date of this Measure.

2. **Use Tax.** A tax is hereby imposed on the storage, use, or other consumption in the District of tangible personal property purchased from any retailer on and after the operative date of this Measure for storage, use, or other consumption in said territory at the rate of 0.500% of the sales price of the property. The sales price shall include delivery charges when such charges are subject to state sales or use tax regardless of the place to which delivery is made.

3. **Excess Taxes.** Notwithstanding the foregoing, if the combined rate of all local sales, transactions, and use taxes would exceed an applicable combined rate limit under California state law in any particular jurisdiction(s) within the District, the tax adopted by this Measure shall not be imposed in said jurisdiction(s), unless and until the combined rate no longer exceeds the applicable limit in those jurisdiction(s); this shall not affect the imposition of the tax under this Measure in jurisdictions within the District that do not exceed the applicable combined rate limit under state law. A jurisdiction that is unable to impose the tax adopted by this Measure due to this prohibition shall not be entitled to its share of the proceeds of the tax unless and until the tax can be and is lawfully imposed in that jurisdiction; for any year in which a jurisdiction is ineligible to receive funds pursuant to this provision, any funds scheduled by the Expenditure Plan to be distributed to such jurisdiction(s) shall be reallocated monthly on a proportional basis to all other eligible jurisdictions.

B. **Place of Sale.** For the purposes of this Measure, all retail sales are consummated at the place of business of the retailer unless the tangible personal property sold is delivered by the retailer or his agent to an out-of-state destination or to a common carrier for delivery to an out-of-state destination. The gross receipts from such sales shall include delivery charges, when such charges are subject to the state sales and use tax, regardless of the place to which delivery is made. In the event a retailer has no permanent place of business in the State or has more than one place of business, the place or places at which the retail sales are consummated shall be determined under rules and regulations to be prescribed and adopted by the CDTFA.

C. **Use of Proceeds.** Revenues from the tax shall only be used for transportation purposes as set forth in the Expenditure Plan (Exhibit A), specified administrative costs, and debt service on bonds and expenses related to the issuance and administration of bonds, as limited by this Measure. Transportation purposes include expenditures for planning, environmental review and mitigation, project engineering and design, and associated right-of-way acquisition pursuant to the Expenditure Plan.

D. **Contract with State.** Prior to the operative date of this Measure, the Authority shall contract with CDTFA to perform all functions incidental to the collection of the tax imposed by this Measure; provided, that if the Authority shall not have contracted with CDTFA prior to the operative date, it shall nevertheless so contract and in such a case, the operative date shall be the first day of the first calendar quarter following the execution of such a contract.

E. **Tax Subject to Provisions of State Law.** As required by state law, and except as otherwise provided in this Measure and except insofar as they are inconsistent with the provisions of Part 1.6 of Division 2 of the Revenue and Taxation Code, this Measure is subject to the provisions of Part 1 (commencing with Section 6001) of Division 2 of the Revenue and Taxation Code, with the District as the taxing agency.

F. **Permit not Required.** If a seller’s permit has been issued to a retailer under Section 6067 of the Revenue and Taxation Code, an additional transactor’s permit shall not be required by this Measure.

G. **Exemptions and Inclusions.** Pursuant to the generally applicable requirements of state law:

1. There shall be excluded from the transactions and use tax the amount of any sales tax or use tax imposed by the State of California or by any city, city and county, or county pursuant to the Bradley-Burns Uniform Local Sales and Use Tax Law or the amount of any state-administered transactions or use tax.

2. There are exempted from the computation of the amount of transactions tax the gross receipts from:

a. Sales of tangible personal property, other than fuel or petroleum products, to operators of aircraft to be used or consumed principally outside the county in which the sale is made and directly and exclusively in the use of such aircraft as common carriers of persons or property under the authority of the laws of this State, the United States, or any foreign government.

b. Sales of property to be used outside the District which is shipped to a point outside the District, pursuant to the contract of sale, by delivery to such point by the retailer or his agent, or by delivery by the retailer to a carrier for shipment to a consignee at such point. For the purposes of this paragraph, delivery to a point outside the District shall be satisfied:

1. With respect to vehicles (other than commercial vehicles)



## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

subject to registration pursuant to Chapter 1 (commencing with Section 4000) of Division 3 of the Vehicle Code, aircraft licensed in compliance with Section 21411 of the Public Utilities Code, and undocumented vessels registered under Division 3.5 (commencing with Section 9840) of the Vehicle Code by registration to an out-of-District address and by a declaration under penalty of perjury, signed by the buyer, stating that such address is, in fact, his or her principal place of residence; and

ii. With respect to commercial vehicles, by registration to a place of business out-of-District and declaration under penalty of perjury, signed by the buyer, that the vehicle will be operated from that address.

c. The sale of tangible personal property if the seller is obligated to furnish the property for a fixed price pursuant to a contract entered into prior to the operative date of this Measure.

d. A lease of tangible personal property which is a continuing sale of such property, for any period of time for which the lessor is obligated to lease the property for an amount fixed by the lease prior to the operative date of this Measure.

e. For the purposes of subparagraphs (c) and (d) of this section, the sale or lease of tangible personal property shall be deemed not to be obligated pursuant to a contract or lease for any period of time for which any party to the contract or lease has the unconditional right to terminate the contract or lease upon notice, whether or not such right is exercised.

3. There are exempted from the use tax imposed by this Measure:

a. The gross receipts from the sale of which have been subject to a transactions tax under any state-administered transactions and use tax measure.

b. The storage, use, or other consumption in this District of tangible personal property, other than fuel or petroleum products, purchased by operators of aircraft and used or consumed by such operators directly and exclusively in the use of such aircraft as common carriers of persons or property for hire or compensation under a certificate of public convenience and necessity issued pursuant to the laws of this State, the United States, or any foreign government. This exemption is in addition to the exemptions provided in Sections 6366 and 6366.1 of the Revenue and Taxation Code of the State of California.

c. The storage, use, or other consumption in this District of tangible personal property if the purchaser is obligated to purchase the property for a fixed price pursuant to a contract entered into prior to the operative date of this Measure.

d. If the possession of, or the exercise of any right or power over, the tangible personal property arises under a lease which is a continuing purchase of such property for any period of time for which the lessee is obligated to lease the property for an amount fixed by a lease prior to the operative date of this Measure.

e. For the purposes of subparagraphs (c) and (d) of this section, storage, use, or other consumption or possession of, or exercise of any right or power over, tangible personal property shall be deemed not to be obligated pursuant to a contract or lease for any period of time for which any party to the contract or lease has the unconditional right to terminate the contract or lease upon notice, whether or not such right is exercised.

f. Except as provided in subparagraph (g), a retailer engaged in business in the District shall not be required to collect use tax from the purchaser of tangible personal property, unless the retailer ships or delivers the property into the District or participates within the District in making the sale of the property, including, but not limited to, soliciting or receiving the order, either directly or indirectly, at a place of business of the retailer in the District or through any representative, agent, canvasser, solicitor, subsidiary, or person in the District under the authority of the retailer.

g. "A retailer engaged in business in the District" shall include any retailer of any of the following: vehicles subject to registration pursuant to Chapter 1 (commencing with Section 4000) of Division 3 of the Vehicle Code, aircraft licensed in compliance with Section 21411 of the Public Utilities Code, or undocumented vessels registered under Division 3.5 (commencing with Section 9840) of the Vehicle Code. That retailer shall be required to collect use tax from any purchaser who registers or licenses the vehicle, vessel, or aircraft at an address in the District.

h. "A retailer engaged in business in the district" shall also include any retailer that, in the preceding calendar year or the current calendar year, has total combined sales of tangible personal property in this state or for delivery in the state by the retailer and all persons related to the retailer that exceeds five hundred thousand dollars (\$500,000). For purposes of this section, a person is related to another person if both persons are related to each other pursuant to Section 267(b) of the Internal

Revenue Code and the regulations thereunder.

4. Any person subject to use tax under this Measure may credit against that tax any transactions tax or reimbursement for transactions tax paid to a district imposing, or retailer liable for a transactions tax pursuant to Part 1.6 of Division 2 of the Revenue and Taxation Code with respect to the sale to the person of the property the storage, use, or other consumption of which is subject to the use tax.

**H. Statutory Amendments Under Mandatory State Law.** As required by state law, all amendments subsequent to the effective date of this Measure to Part 1 of Division 2 of the Revenue and Taxation Code relating to sales and use taxes which are not inconsistent with Part 1.6 of Division 2 of the Revenue and Taxation Code, and all amendments to Part 1.6 of Division 2 of the Revenue and Taxation Code, shall automatically control this Measure, provided however, that no such amendment shall operate so as to affect the rate of tax imposed by this Measure.

**I. Enjoining Collection Forbidden.** No injunction or writ of mandate or other legal or equitable process shall issue in any suit, action, or proceeding in any court against the State or the Authority, or against any officer of the State or the Authority, to prevent or enjoin the collection under this Measure, or Part 1.6 of Division 2 of the Revenue and Taxation Code, of any tax or any amount of tax required to be collected.

**J. Termination Date.** The authority to levy the tax imposed by this Measure shall expire on March 31, 2063.

**K. Existing Tax.** Nothing in this Measure is intended to modify, repeal, alter, or increase the Existing Tax. The provisions of this Measure shall apply solely to the retail transactions and use tax adopted herein and not to the collection or administration of the Existing Tax.

### Section V. MANDATORY TAXPAYER SAFEGUARDS.

To ensure that the use of the proceeds of the tax imposed by this Measure is consistent with voter intent, the following mandatory taxpayer safeguards shall apply:

**A. Independent Taxpayer Oversight Committee.** An Independent Taxpayer Oversight Committee ("ITOC"), as specified in Exhibit B of this Measure, shall provide citizen review and ensure that all funds generated by this tax are spent in accordance with provisions of the Expenditure Plan and Measure. Exhibit B sets forth the specific terms and conditions for the ITOC and its role in supervising annual fiscal and periodic performance audits.

**B. Administrative Costs.** Notwithstanding any provision of the Expenditure Plan, the Authority may expend, but not exceed, one percent (1.00%) of total gross annual revenue generated by this tax after deduction of administrative and collection costs of the CDTFA, on costs of the Authority's administration, including its responsibilities for audit, the ITOC, Authority administrative expenses, staff support, and contract services. The Authority may consider, through an Expenditure Plan amendment as provided for in Section XIII of this Measure, expending up to, but not exceeding, one and one-half percent (1.50%) of the total annual sales tax revenue after deduction of collection costs of the CDTFA, on costs of the Authority's administration, which increase shall only be effective after the expiration of the Existing Tax in 2039.

**C. Maintenance of Effort.** By enactment of this Measure, it is intended that the funding provided to Implementing Agencies will supplement and not replace existing local revenues being used for transportation purposes. Tax revenue generated by this Measure shall not be used to supplant existing transportation funding programs, including but not limited to any applicable existing local transportation impact fees imposed on new development, along with any existing applicable Countywide transportation mitigation fees. The Authority and the ITOC shall enforce this provision by appropriate review, including program, fiscal, and performance audits.

**D. Expenditure Plan Formal Review.** As set forth in Section XIII of this Measure, the Authority shall conduct a formal review of the Expenditure Plan every 10 years, beginning in 2033, to ensure that the program accommodates contemporary community transportation needs in light of changing demographics, technology, and revenue estimates. Based on this review, the Authority may propose amendments to the Expenditure Plan, but such amendments may only take effect following the required public amendment process set forth in Section XIII of this Measure.

### Section VI. BONDING AUTHORITY.

Upon voter approval of this Measure, the Authority shall have the power to sell or issue, from time to time, on or before the collection of taxes, bonds or other evidence of indebtedness, in the aggregate principal amount at any one time outstanding of not to exceed the estimated proceeds of the tax imposed by this Measure, and to secure such indebtedness solely by way of future collection of those taxes, for capital outlay expenditures as set forth in this Measure, including the carrying out of transportation projects described in the Expenditure Plan. In the event long-term cost demands for a particular project pursuant to the Expenditure Plan at any time exceed the cumulative allocations to the Implementing Agency responsible for project construction, such that the planned project work by that Implementing Agency will be materially delayed, the Implementing Agency may request that the Authority issue bonds to

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

cover the anticipated project cost requirements to meet cost demands in a manner that will avoid the delay. Alternatively, to the extent permitted by applicable law, and on approval of the Authority, the power to sell or issue debt may be conferred upon an Implementing Agency if deemed more efficient or cost-effective under certain circumstances as determined by the Authority. Debt service for the cost of issuing any bonds by the Authority at the request of an Implementing Agency or by an Implementing Agency at the discretion of the Authority shall be paid from future allocations due to the Implementing Agency that has requested the issuance of bonds.

### Section VII. ANNUAL APPROPRIATIONS LIMIT.

The Authority established an annual appropriations limit pursuant to Section 4 of Article XIII B of the California Constitution and Section 180202 of the Public Utilities Code in the amount of \$315,753,737 for fiscal year 2021-22. The Authority's appropriations limit is subject to annual adjustment as provided by law.

### Section VIII. LOCAL BANKING REQUIREMENTS.

Unless restricted or prohibited by state or federal law or regulations, Implementing Agencies receiving funds generated from this Measure should hold at least 25% of these funds in accounts locally through a community bank or credit union. For purposes of this section, the definition of a community bank or credit union is a federally- or a state-chartered community bank or credit union with recognized headquarters located in Sacramento County or an adjacent county as long as its headquarters is within 25 miles of the boundary of Sacramento County. To qualify, a community bank or credit union must be authorized to receive deposits from public agencies and must maintain a "Superior," "5 Star" or equivalent rating from a nationally recognized rating agency. Implementing Agencies shall be responsible for compliance with this section and must certify to the Authority through quarterly reports that the requirements have been met or provide an explanation for not meeting them.

### Section IX. SKILLED AND TRAINED WORKFORCE REQUIREMENTS.

No contract in excess of one million dollars (\$1,000,000.00) can be funded with the tax revenue raised by this Measure unless the contracting entity provides an enforceable commitment that the entity and its subcontractors will use a skilled and trained workforce to perform all work that falls within an apprenticeship occupation in the building and construction trades [per Chapter 2.9 (commencing with Section 2600) of Part 1 of Division 2 of the Public Contract Code, as may be amended from time to time]. "Skilled and trained workforce" means a workforce that meets both of the following criteria: (1) All the workers are either registered apprentices or skilled journeypersons. (2) At least 30 percent of the skilled journeypersons are graduates of an apprenticeship program for the applicable occupation.

An "apprenticeable occupation" is one which requires independent judgment and the application of manual, mechanical, technical, or professional skills and is best learned through an organized system of on-the-job training together with related and supplemental instruction. Implementing Agencies shall be responsible for meeting these requirements and must certify to the Authority through quarterly reports that the requirements have been met.

### Section X. EFFECTIVE DATE AND OPERATIVE DATE OF TAX.

**A. Effective Date of Measure.** This Measure is considered adopted and effective upon the earliest date legally possible. Upon the effective date of this Measure, the Authority is directed to promptly take all appropriate actions needed to implement this Measure.

**B. Operative Date of Tax.** The retail transactions and use tax adopted by this Measure shall become operative on the first day of the first calendar quarter commencing more than 110 days after the adoption of the Measure, but in no event earlier than April 1, 2023.

### Section XI. IMPLEMENTATION OF THIS MEASURE.

Upon the effective date of this Measure, the Authority is directed to promptly take all appropriate actions needed to implement this Measure. The Authority shall be responsible for overseeing and administering the implementation of the requirements of this Measure, including the Expenditure Plan.

### Section XII. INTERPRETATION AND SEVERABILITY.

**A.** This Measure must be interpreted so as to be consistent with all federal and state laws, rules, and regulations. If any section, sub-section, sentence, clause, phrase, part or portion of this Measure is held to be invalid or unconstitutional by a final judgment of a court of competent jurisdiction, such decision does not affect the validity of the remaining portions of this Measure. The voters declare that this Measure, and each section, sub-section, sentence, clause, phrase, part or portion thereof, would have been adopted or passed irrespective of the fact that any one or more sections, sub-sections, sentences, clauses, phrases, part, or portion is found to be invalid. If any provision of this Measure is held invalid as applied to any person or circumstance, such invalidity does not affect any application of this Measure that can be given effect without the invalid application.

**B.** If any portion of this Measure is held by a court of competent jurisdiction to be invalid, we the People of the Sacramento Transportation Authority indicate our strong desire that: (i) the Authority use its best efforts to sustain and re-enact that portion, and (ii) the Authority implement this Measure by taking all

steps possible to cure any inadequacies or deficiencies identified by the court in a manner consistent with the express and implied intent of this Measure, including, to the extent permitted by law, adopting or reenacting any such portion in a manner consistent with this Measure.

**C.** This Measure must be broadly construed in order to achieve the purposes stated above. It is the intent of the voters that the provisions of this Measure be interpreted or implemented by the Authority and others in a manner that facilitates the purpose set forth in this Measure.

### Section XIII. AMENDMENT.

**A.** Pursuant to California Elections Code Section 9323, this Measure may only be amended or repealed by a vote of the people, except as provided in subsection B of this Section.

**B.** Notwithstanding subsection A of this Section, the following amendments may be made without approval of the voters:

**1.** "Eligible Projects" as set forth Section III of the Expenditure Plan (Exhibit A hereto) may be amended annually pursuant to the provisions in the Expenditure Plan. The amendment authority provided by this subsection B.1 shall not include the ability to amend the Measure Revenue Percentage Allocations by Spending Category, as set forth in Section II and referenced in Section III of the Expenditure Plan.

**2.** All sections of the Expenditure Plan other than Sections I.K (pertaining to Metropolitan Transportation Plan & GHG Reduction Targets) and I.P (pertaining to Program Administration & Independent Taxpayer Oversight) may be amended by the following process:

**a.** Beginning in 2033, and every 10 years thereafter, the Authority shall review and, if necessary, propose amendments to the Expenditure Plan to meet changing transportation needs, priorities, and revenue estimates, and to ensure that the program reflects contemporary community desires considering changing demographics and technology. Such review shall consider input from the Implementing Agencies, other transportation agencies, interest groups, and the general public.

**b.** The Authority shall notify the County Board of Supervisors, the city councils, and the policy boards of other Implementing Agencies in writing of its initiation of Expenditure Plan amendment(s), reciting findings of necessity.

**c.** Any proposed Expenditure Plan amendment(s) resulting from this process must be approved by the County Board of Supervisors and a majority of the city councils representing two-thirds of the incorporated area population.

**d.** Actions of the County Board of Supervisors and city councils regarding the proposed amendment(s) shall be communicated to the Authority within 60 days after the date notification is mailed. Failure of the Board of Supervisors or a city council to notify the Authority of formal action within 60 days of notification shall constitute approval by that respective policy board.

### Section XIV. LEGAL DEFENSE.

The purpose of this section is to ensure that the people's right of initiative cannot be improperly annulled by politicians who refuse to defend the will of the voters. Therefore, if this Measure is approved by the voters and thereafter subjected to a legal challenge which attempts to limit the scope or application of this Measure in any way, or alleges this Measure violates any state or federal law in whole or in part, the Authority shall faithfully and vigorously defend this Measure to the fullest extent possible on behalf of the people of the Authority.

### Section XV. EXHIBIT LIST.

**Exhibit A:** Sacramento County Transportation Retail Transactions and Use Tax Expenditure Plan 2023 – 2063

**Exhibit B:** Independent Taxpayer Oversight Committee

# INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

## EXHIBIT A

### Sacramento County Transportation Retail Transactions and Use Tax Expenditure Plan 2023-2063

#### I. Implementation Guidelines

**A. Revenue Estimates and Distribution.** Allocation of revenue authorized by this Measure is established within this Expenditure Plan. Funds shall be allocated to Expenditure Plan categories by percentage of net revenue received, except as provided below. An estimate of revenues and allocations among categories is reflected in this Expenditure Plan. Some category allocations will be sub-allocated, as reflected in the percentage allocation in Section III of this Expenditure Plan, to specified local transportation providers for expenditures on specified projects. The estimated revenue is based on 2021 value of funds escalated over the period of the Measure and is not binding or controlling. Estimated revenues are net of any applicable required California Department of Tax and Fee Administration (CDTFA) collection fees.

**B. “Off the Top” Project Expenditures.** Revenues available for percentage allocation are also net of the cost of Authority administration (as limited by this Measure) and the following fixed program expenditures to be directly allocated to recipient agencies in the following total amounts for the specific purposes indicated:

1. To Sacramento County, the Regional Parks Department, not to exceed \$64 million for the Program Period for preservation, maintenance, and safety of the American River Parkway.
2. To the City of Sacramento, not to exceed \$20 million for the Program Period for direct support of the development of a Regional Mobility Center to foster innovation in clean transportation.
3. To the Sacramento Area Council of Governments (SACOG), not to exceed \$8 million for the Program Period for distribution to support the activities of transportation management agencies in Sacramento County.
4. To the San Joaquin Regional Rail Commission, not to exceed \$80 million for the Program Period for operations and service enhancements related to the Altamont Corridor Express service that will benefit Sacramento County residents.
5. To the City of Sacramento, not to exceed \$40 million for the Program Period for operations related to the Sacramento Intermodal Transportation Facility.

All remaining revenue following these “off the top” expenditures shall be referred to as “net tax revenues generated by this Measure” for purposes of this Expenditure Plan.

**C. Contribution from New Property Development.** No revenue generated from the tax imposed by this Measure shall be used to supplant transportation mitigation fees currently imposed on new property development in Sacramento County. Pursuant to Section V of this Measure, the County and each incorporated city must continue to impose any and all existing transportation impact fee programs as a condition for receiving funds generated by this Measure.

**D. Requirement for Annual Financial and Performance Audits of Measure Funds.** The Authority and each Implementing Agency receiving an allocation of revenue authorized by this Expenditure Plan shall undergo an annual financial audit performed in accordance with generally accepted accounting standards and government auditing standards issued by the Comptroller General of the United States, as may be amended from time to time. The annual audit shall be supervised by the Authority's Independent Taxpayer Oversight Committee (ITOC). Compliance audits shall also be periodically conducted to ensure that Measure funds are expended in accordance with the provisions and guidelines established by this Expenditure Plan. In addition, the ITOC shall conduct periodic performance audits to determine progress in meeting program performance

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

standards adopted by the Authority Board, and to make recommendations for improving overall program performance.

- E. Five-Year Programs.** In order to be eligible for funds generated by this Measure, each Implementing Agency must annually prepare and adopt a five-year program that is approved by the Authority, and shall file with the Authority an annually updated five-year program for expenditure of the tax revenue allocations. The first five-year program must be completed by December 31, 2023, and updated thereafter on an annual basis. Section II herein identifies reporting requirements for specific funding categories. Additional or revised reporting requirements may be adopted by the Authority after consultation with Implementing Agencies and stakeholders.
- F. "Fix It First" Investment Priority for Years 1-5.** With the exception of Caltrans and the Capital Southeast Connector Joint Powers Authority, Authority allocations for the first five years following implementation of this Measure shall prioritize "Fix It First" road, transit, safety, bicycle, and pedestrian investments. Each recipient agency responsible for maintaining streets and roads shall annually provide a pavement and bridge maintenance report. For the Sacramento Regional Transit District (SacRT), the annual update shall include performance indicators to assess whether "Fix It First" investment needs are being prioritized and to demonstrate that the agency is adhering to the financial management policies identified herein.
- G. Clear Format to Assess Progress.** For all agencies receiving "Fix It First" funding allocations, the five-year programs and annual updates shall be provided in a format to clearly assess progress towards improved maintenance and operations of existing transportation assets.
- H. Complete Streets.** Transportation projects provide opportunities to improve safety, access, and mobility for all users of streets, roads, and highways in Sacramento County and recognizes bicycle, pedestrian, vehicle, and transit modes as integral elements of the transportation system. The term "Complete Streets" describes a comprehensive, integrated transportation network with roadways designed and operated to enable safe and convenient travel for users of all abilities, including motorists, pedestrians, bicyclists, persons with disabilities, seniors, children, movers of commercial goods, operators of public transportation, public transportation users, and emergency responders, in a balanced manner that is compatible with an urban, suburban, or rural context.

Within one year following the implementation of this Measure, each local jurisdiction in Sacramento County receiving Measure funds shall adopt or maintain an existing "complete streets" policy or a similar document that incorporates design guidelines and standards promoting safe and convenient travel for all users including bicyclists and pedestrians when considering any construction, reconstruction, retrofit, or alteration of streets, roads, highways, bridges, and other elements of the transportation system.

Planning and design of projects affecting the transportation system shall be consistent with any local bicycle, pedestrian, transit, multimodal, and other relevant plans and/or the local complete streets policy to ensure that all transportation types and users are considered in the expenditure of Measure funds.

- I. Regional Mobility Innovation Program.** A regional Mobility Innovation Program can provide funding to test, incubate, and support innovative mobility solutions that reduce car trips by increasing access to transportation options for all residents. Innovative solutions could include electric car-sharing programs, shared scooter and bicycle programs, mobility hubs, mobility as a service, universal basic mobility passes, first/last mile connections to transit, and autonomous and driverless shuttle services. A key component of testing, incubating, and supporting these mobility innovations will be ensuring that the services and programs benefit communities of color, low-income residents, seniors, and people with disabilities. An innovation program can also be used to leverage other state and federal funding sources that will be increasingly available and allow Implementing Agencies as part of the region to better compete for discretionary programs. The program will also be available to leverage public-private partnerships to attract new mobility start-ups and technology companies to provide additional economic and job creation benefits.

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

Within one year following the implementation of this Expenditure Plan, the Authority will convene all Implementing Agencies and SACOG to collaborate in the creation of a mobility innovation program for the region. As provided in the subcategory Local Street and Road Repair and Transformative System Improvements of Section III (Eligible Projects) of this Expenditure Plan, Implementing Agencies may choose, but are not required, to invest a portion of their share of sales tax revenues in mobility innovations projects or programs.

**J. Federal Air Quality Requirements.** Measure funds programmed by this Expenditure Plan for a project construction phase shall not impair the ability of the region's Metropolitan Transportation Plan (MTP) and Metropolitan Transportation Improvement Program (MTIP) to meet federal air quality conformity requirements.

**K. Metropolitan Transportation Plan & GHG Reduction Targets.** The Sacramento region Metropolitan Transportation Plan/Sustainable Communities Strategy (MTP) currently requires that the region meet a 19% per capita greenhouse gas (GHG) reduction target. Expenditure Plan projects that are planned or programmed for construction in an MTP, as may be amended from time to time, shall be eligible for Measure funds. Expenditure Plan projects not planned or programmed for construction in an MTP shall be eligible for Measure funds if the construction phase of the project is exempt from project-level and regional level air quality conformity.

For any non-exempt projects that are not planned or programmed for construction in an MTP, as may be amended from time to time, the following requirements will apply:

1. In order to meet the then applicable regional GHG reduction target for the MTP, project sponsors (parties) shall develop mitigation measures for any project(s) that increases GHG emissions.
2. If the parties can mitigate any such project impacts to maintain adherence to the then applicable regional GHG reduction target, the project(s) shall be eligible for Measure funds.
3. If the GHG impacts are not mitigated to meet the region's then applicable GHG reduction target, and as a result the region cannot meet its applicable GHG target, the funds planned for the non-exempt project(s) may be used by the corresponding Implementing Agency at their discretion, for other than the originally intended project(s), provided any alternative project(s) are consistent with the Expenditure Plan and included in an MTP, as may be amended from time to time, that meets the then applicable target. Per above, alternative project(s) not planned or programmed for construction in an MTP shall be eligible for Measure funds if the construction phase of the project(s) is exempt from project-level and regional-level air quality conformity.

**L. Environmental Review.** All projects funded with Measure funds are subject to the requirements of the California Environmental Quality Act (CEQA). Prior to allocation of funds for construction of any project or program included in the Expenditure Plan, all necessary environmental review required by CEQA shall be completed.

**M. Road Health and Safety.** Each Implementing Agency shall demonstrate that projects in the five-year program and individual proposed projects incorporate street design elements to quantifiably reduce the risk of traffic-related deaths and severe injuries in the public right-of-way consistent with the principles of this Measure. Where applicable, each recipient agency shall also demonstrate that the projects adhere to principles that facilitate safer walking and bicycling to and from school.

**N. Revenue Estimate.** Tax revenues generated by this Measure during the Program Period are estimated to be \$8,500,000,000 based on escalated dollar values. Revenue estimates are simply estimates and are not binding or controlling.

**O. Anticipated Extension of the Sacramento Countywide Transportation Mitigation Fee Program (SCTMFP).** To ensure that the tax adopted by this Measure provides maximum benefit to all County citizens, it is the intent of the voters that revenue generated by this tax shall not be used to supplant existing transportation funding programs, and that the County and the cities continue to impose all currently applicable local transportation impact fees. The voters expressly acknowledge that, although the SCTMFP is set to expire April 1, 2039, it is anticipated that the Authority will act before that date to extend the fee program so that it runs concurrently with the life of this tax (i.e., until 2063), and the Authority is encouraged to do so. However,

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

because any such future SCTMFP extension is subject to action by the Authority, including validation by a nexus study, and any new SCTMFP fees collected would be allocated to specific projects through a process determined by the Authority in coordination with local jurisdictions, the potential, future allocations for funding from an extended fee program are not included in this Expenditure Plan. Rather, this Expenditure Plan governs only the distribution of revenue resulting from the imposition of the retail transactions and use tax authorized by this Measure.

- P. Program Administration & Independent Taxpayer Oversight.** 1.0% of all gross annual tax revenues, net of any applicable CDTFA administrative fees, generated by this Measure after deduction of collection costs of the CDTFA shall be allocated monthly to the Authority for general and financial administration of the Authority and the Measure program, coordination and consultation with Implementing Agencies receiving Measure funds and SACOG, facilitation and administration of the Independent Taxpayer Oversight Committee, independent financial and performance audits, and ongoing public information and outreach. The Authority may consider increasing the Program Administration allocation to 1.5% through an Expenditure Plan amendment, as provided for in Sections V and XIII of this Measure, which increase shall only be effective after the expiration of the Existing Tax.

### II. Measure Revenue Percentage Allocations by Spending Category

All tax revenues generated by this Measure, net of any applicable CDTFA administrative fees, the cost of Authority administration, and allocations outlined in Section I, Subsection B of this Expenditure Plan, shall be expended in the following spending categories:

#### A. Local Streets and Roads.

47.25% of annual net tax revenues generated by this Measure shall be allocated monthly to each incorporated city and the unincorporated county consistent with the following distribution:

##### 1. Local Street and Road Repair and Transformative System Improvements.

38.72% of all annual net tax revenues generated by this Measure shall fund project development, right-of-way, construction, and provision of:

- a. "Fix It First" pavement maintenance, pavement rehabilitation, safety projects, and bridge repair, including complete streets improvements, which consist of the rehabilitation and modification of existing arterial streets to contemporary urban standards sufficient to serve all users of the facilities, such as bicyclists, pedestrians, and transit users.
- b. New or expanded arterial streets, roads, and bridges, including complete streets improvements, which consist of the rehabilitation and modification of existing arterial streets to contemporary urban standards sufficient to serve all users of the facilities, such as bicyclists, pedestrians, and transit users.
- c. Projects or programs that support mobility innovation.
- d. Intelligent transportation system modifications to the existing street and road system to facilitate improved accessibility, safety, operations, and efficiency.
- e. Programs to promote walking and bicycling as travel alternatives.
- f. Improvements to facilitate safe and convenient pedestrian, bicycle, and other non-motorized local trips, safe routes to school, lighting and synchronized signals, vehicle charging stations, trail improvements, and other improvements to better facilitate improved mobility and the development of alternative travel options. The allocation of Measure funds will implement street design elements that quantifiably reduce the risk of traffic-related deaths and severe injuries in the public right-of-way and ensure that the mobility needs of all users are considered in project scope elements.
- g. Education and outreach to facilitate bicycle and pedestrian travel and school access.
- h. Bikeways, signage, wayfinding, and bicycle facilities.
- i. American River Parkway Trail improvements and maintenance in the jurisdictions through which the parkway passes (County of Sacramento, City of Sacramento, and the City of Rancho Cordova).

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

- j. Improvements to the Sacramento River Parkway and other regional trails.
- k. Trail improvements to the Folsom Lake State Recreation Area in the City of Folsom.
- l. Installation or improvements to streetscape for bicyclists.

Percentage distribution among the cities and unincorporated county shall be based 75% on relative population (per most recent annual California Department of Finance estimates, as may be amended from time to time) and 25% on relative paved and maintained road mileage (as reported in each entity's automated pavement management system). Specific percentage allocations to the cities and unincorporated county for Local Street and Road Repair and Transformative System Improvements, as reflected in Section III of this Expenditure Plan, shall be updated annually based on current data and any modifications approved by the Authority pursuant to the terms of this Measure.

### ***Local Street and Road "Fix It First" Commitment***

For the first five years following the date of implementation of this Measure, not less than 90% of the funds identified in this Local Street and Road Repair and Transformative System Improvements program shall be used exclusively by all cities and the County of Sacramento for "Fix It First" street, road, and bridge preventative maintenance and rehabilitation, including safety improvements, so as to bring these facilities throughout Sacramento County up to a pavement condition index (PCI) of at least 70 at the soonest possible time, and, for bridges, to meet accepted state and federal standards.

At the end of the five-year period following the date of implementation of this Measure, not less than 50% of the funds identified in this Local Street and Road Repair and Transformative System Improvements program shall be used exclusively by all cities and the County of Sacramento for "Fix It First" street, road, and bridge preventative maintenance and rehabilitation so as to continue efforts to bring these facilities throughout Sacramento County to a PCI of at least 70, and, for bridges, to meet accepted state and federal standards.

A 70 PCI is generally defined as safe, reliable, and smooth street surfaces with little to no blemishes, potholes, or substantial cracking. Streets and roads with a 70 PCI are expected to have a comfortable and safe ride for all motorized vehicles and bicycles, with minimum wear and tear on all such users.

The definition of maintenance and rehabilitation shall include as eligible for these funds the non-capacity upgrade of existing streets and roads to a contemporary urban standard (complete streets), including improvements to enhance safety and access for pedestrians, bicycles, and transit users.

Notwithstanding the "Fix It First" requirements for these funds over the program period following implementation of this Measure, the percentage commitment to "Fix It First" maintenance and rehabilitation may be reduced, and any city and the County of Sacramento may direct a higher percentage of those funds to new transformative system improvements, provided the following conditions have been met:

- a. The public agency manager responsible for road maintenance has certified in writing to the City Council and City Manager in a city and the Board of Supervisors and the Chief Administrative Officer at the County that the road facilities under their management have met or will meet within the next 12 months a 70 PCI rating, and that bridges meet accepted state and federal standards.
- b. The public agency manager responsible for road maintenance has submitted a written plan to the City Manager or County Chief Administrative Officer clearly demonstrating how the 70 PCI rating will be sustained in the future. Any diversion of funds committed to maintenance and rehabilitation can only continue as long as a jurisdiction maintains an average PCI of 70 or above for its street and road systems, and bridges meet accepted state and federal standards.

### ***Accountability***

The objective for this Measure is to assist Implementing Agencies to achieve—but not require—a local match of at least one-third of total capital project costs. However, a city or the County may direct all or a portion of its share of these funds to general street/road pavement maintenance and pavement rehabilitation.

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

The proportional allocation among entities will be recalculated annually to reflect current population and road mileage data. Each Implementing Agency shall adopt a five-year program for use of these funds.

The five-year programs will be updated annually and submitted to the Authority for approval. For Implementing Agencies responsible for maintaining streets and roads, the annual updates to the five-year programs shall include pavement and bridge “Maintenance of Effort” reports.

### 2. Local Projects of Regional Significance.

8.53% of all annual net tax revenues generated by this Measure shall fund projects within the boundaries of local jurisdictions that provide a regional benefit to the overall transportation network. These projects include construction or modifications to interchanges interfacing with state highways, projects that are required for mitigation purposes for new or expanded access to the transportation system, improvements to local arterials or other transportation facilities that provide regional connectivity and improvements throughout the County. Interchange projects funded through this category will require a federal, state, local, or developer match of at least one-third the cost of the project. Distribution of these revenues among the cities and the unincorporated County area are reflected in the percentage allocations in Section III of this Expenditure Plan, which takes into account population, lane miles, and sales tax generation. Following the implementation of this Measure, the specific percentage allocations to Implementing Agencies for Local Projects of Regional Significance, as reflected in Section III of this Expenditure Plan, shall be reviewed annually by the public works directors of each city and the County based on updated data, and any modifications of percentage allocations must be approved by the Authority pursuant to the terms of this Measure.

#### *Accountability*

Aside from the one-third match requirement for interchange projects, it is the objective of this Measure to assist Implementing Agencies to achieve—but not require—a local match of at least one third of any capital project costs from other sources. Funding from this subcategory will be restricted to the high priority projects listed by jurisdiction.

### B. Sacramento Regional Transit District (SacRT) Maintenance, Operations, and Transformative System Improvements.

25.11% of all annual net tax revenues generated by this Measure shall be allocated monthly to SacRT to be used for light rail and bus vehicle replacement, operations and maintenance of existing services, operations and maintenance for new services partially funded through this Expenditure Plan, improved access for the senior and disabled populations, fare reductions for transit-dependent riders, and the implementation of innovative services that will improve transit connections and encourage increased ridership.

#### *SacRT “Fix It First” Commitment*

For the five years following the date of implementation of this Measure, a portion of the funds directly allocated to SacRT will be used by SacRT for “Fix It First” bus and light rail vehicle replacement, operations, maintenance, and security for existing services at the soonest possible time. As a federal grantee, SacRT has developed and maintains a Transit Asset Management (TAM) Plan that includes capital asset inventories, condition assessments, lifecycle management, and investment prioritization. The plan addresses the application of asset management across SacRT’s entire diverse portfolio of assets, which includes assets with a range of useful lives, replacement costs, and inter-relationships.

During this period the following performance metrics shall also be met:

1. SacRT will meet or exceed generally accepted industry standards for the percentage of buses and light rail vehicles that meet or exceed useful vehicle life or average vehicle age benchmarks.
2. SacRT will meet or exceed generally accepted industry standards for miles between road calls, on-time performance, missed trips, and safety/security key performance indicators, unless factors outside of SacRT’s control impact the ability to meet these metrics.
3. SacRT will meet or exceed generally applicable requirements of state law, as may be amended from time



## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

to time, including those of the California Transportation Development Act (TDA), which currently include meeting minimum farebox recovery ratio requirements and independent performance audits conducted every three years.

### *Accountability*

SacRT shall develop a five-year program for use of all capital and operations funds, including capital projects funded under Section II, Subsection C1 of this Expenditure Plan, updated annually and submitted to the Authority for approval before allocations are made. SacRT must be in compliance with the financial management provisions of this section.

For SacRT, the five-year program and each annual program update shall include performance indicators to assess if “Fix It First” investment needs are being prioritized and expenditures are consistent with applicable regional transportation plans, including but not limited to the Metropolitan Transportation Plan, the SacRT Short Range Transit Plan, and the SacRT Transit Asset Management (TAM) Plan, as those plans may be amended from time to time.

### **C. Congestion Relief Improvements.**

22.43% of all annual net tax revenues generated by this Measure shall be used for project management, project development, right-of-way, and construction of highway, transit, rail, increased bus and light rail service, and expressway expansion and widening projects affecting multiple local entities, that reduce congestion, improve operations, and enhance access to the overall transportation network. The objective is for this Measure to assist—but not require—Implementing Agencies, including SacRT, the California Department of Transportation (Caltrans), and the Capital Southeast Connector Joint Powers Authority, to achieve a match of at least one-third of the total cost of each of the eligible projects listed for this category in this Expenditure Plan. Implementing Agencies receiving funding from this category shall develop a five-year program for use of all capital funds, updated annually, and submitted to the Authority for approval before allocations are made.

- 1. Transit and Rail Congestion Improvement Projects.** 10.85% of all annual net tax revenues generated by this Measure shall be allocated monthly to SacRT for transit and rail projects that reduce congestion, expand capacity, improve operations, and enhance access to the transportation system. The proposed allocation amounts for bus and light rail projects are intended to be flexible to allow for SacRT to best apply the funding to achieve the maximum benefit in matching funds from state and federal resources. Projects funded through this subcategory shall be subject to the same accountability provisions included in Section II, Subsection B of this Expenditure Plan regarding development of a five-year plan, updated annually and submitted to the Authority for approval before allocations are made.
- 2. Highway Congestion Improvement Projects.** 11.58% of all annual net tax revenues generated by this Measure shall be allocated to Caltrans and the Capital Southeast Connector Joint Powers Authority for highway congestion improvement projects, including state highway improvements and the Capital Southeast Connector in Sacramento County. Allocations of funding to Caltrans will be used by the department for both project development and capital expenses associated with the projects included in this category and the funding is intended to provide matching leverage for additional state and federal funding. Revenue shall be allocated monthly to the Capital Southeast Joint Powers Authority for the Capital Southeast Connector project.

### **D. Senior and Disabled Transportation Services.**

3.05% of all annual net tax revenues generated by this Measure shall be allocated monthly to provide demand-responsive transportation and other services to eligible seniors and disabled residents. Annually, 80% of the funding for this subcategory will be provided to SacRT to meet the region’s federally mandated Americans with Disability Act (ADA) complimentary paratransit requirement. The funding will be used for planning, design, operational, maintenance, and capital activities for SacRT to provide these critical transportation services to

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

eligible seniors and disabled residents of the County. The remaining 20% of funding for this subcategory will be allocated to the region’s Consolidated Transportation Service Agencies to coordinate and support the many programs serving the transportation needs of seniors, people with disabilities, and other qualified recipients of these services.

**E. Air Quality.**

2.16% of all annual net tax revenues generated by this Measure shall be allocated monthly to the Sacramento Metropolitan Air Quality Management District (SMAQMD) to provide funding for monitoring, planning, emission reduction, and future mobility programs to promote clean air, mitigate climate change and transportation pollution, respond to wildfire smoke impacts, and achieve and maintain health-based air quality standards and low-carbon development goals.

**III. Eligible Projects Within Each Measure Revenue Percentage Allocation Spending Category**

**SACRAMENTO COUNTY TRANSPORTATION RETAIL TRANSACTIONS AND USE TAX**

**EXPENDITURE PLAN 2023-2063**

**ELIGIBLE PROJECTS**

(All dollar figures are estimates)

**LOCAL STREETS AND ROADS (47.25%)** **\$ 3,876,000,000.00**

47.25% of all annual net tax revenues generated by this Measure shall be allocated to each incorporated city and the unincorporated county for local street and road purposes. Funds for each of the subcategories below will be allocated, as reflected in the percentage allocations set forth herein.

**Local Street and Road Repair and Transformative System Improvements (38.72%)** **\$ 3,176,000,000.00**

38.72% of all annual net tax revenues generated by this Measure shall be allocated monthly to each incorporated city and the unincorporated county based 75% on relative population and 25% on relative paved and maintained road mileage. These funds are available for the maintenance and rehabilitation of local streets, roads and other transformative improvements to the local system. Transformative improvements include safety projects, complete streets with or without capacity expansion, sidewalk and pedestrian improvements, mobility innovation projects or programs, active transportation improvements, safe routes to schools, Americans with Disabilities Act compliance, intelligent transportation system enhancements, streetlighting and synchronized signals, electric vehicle charging stations, trail improvements, major arterial improvements, and other improvements which will help transform the overall system to better facilitate improved mobility and the development of alternative travel options.

For the first five years following implementation of this Measure (April 1, 2023, to March 31, 2028), not less than 90% of the funds identified for the Local Street and Road Repair and Transformative System Improvements program shall be used exclusively by all cities and the County of Sacramento for “Fix It First” road and bridge preventative maintenance and rehabilitation, including safety improvements, so as to bring these facilities throughout Sacramento County to a pavement condition index (PCI) of at least 70 at the soonest possible time, and bridges to meet acceptable state and federal standards.

At the end of the five-year period following the date of implementation of this Measure (after

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

March 31, 2028), not less than 50% of the funds identified for the Local Street and Road Repair and Transformative System Improvements program shall be used exclusively by all cities and the County of Sacramento for “Fix It First” street, road, and bridge preventative maintenance and rehabilitation so as to continue efforts to bring these facilities throughout Sacramento County to PCI of at least 70, and bridges to meet acceptable state and federal standards.

A 70 PCI is generally defined as safe, reliable and smooth street surfaces with little to no blemishes, potholes or substantial cracking. Streets and roads with a 70 PCI are expected to have a comfortable and safe ride for all motorized vehicles and bicycles, with minimum wear and tear on all such users.

The definition of maintenance and rehabilitation shall include as eligible for these funds the non-capacity upgrade of existing streets, including improvements to enhance safety and access for pedestrians, bicycles, and transit users.

Notwithstanding these allocation restrictions, the percentage commitments to “Fix It First” maintenance and rehabilitation may be reduced, and any city and the County of Sacramento may direct a higher percentage of those funds to new transformative system improvements, provided the following conditions have been met:

1. The public agency manager responsible for road maintenance has certified in writing to the City Council and City Manager in a city and the Board of Supervisors and the County Chief Administrative Officer that the road facilities under their management have met or will meet within the next 12 months a 70 PCI rating.
2. The public agency manager responsible for road maintenance has submitted a written plan to the City Manager or County Chief Administrative Officer clearly demonstrating how the 70 PCI rating will be sustained in the future. Any diversion of the funds committed to maintenance and rehabilitation can only continue as long as a jurisdiction maintains an average PCI of 70 or above for its street and road system. In addition, local jurisdictions must maintain current levels of funding for maintenance and rehabilitation and shall not use funds from this allocation to offset existing funding planned or allocated for this purpose.

With the exception of the City of Isleton, which will receive a fixed amount of these funds, the percentage allocation for each jurisdiction is listed and includes eligible projects proposed for funding from this category. In addition to the “Fix It First” Maintenance and Rehabilitation allocation, the jurisdiction lists include safety projects, complete streets projects, improvements to major arterials, local road capacity expansion, bicycle and pedestrian improvements, intelligent transportation system enhancements, and other transformative improvements which will facilitate improved mobility and the development of alternative travel options for the future. Arterial improvements and system access projects may also be included in another category of the Expenditure Plan.

**Citrus Heights (5.29%)** **\$ 167,900,000.00**

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- “Fix It First” street maintenance and rehabilitation
- “Complete Streets” improvements:
  - Auburn Blvd (Rusch Park – I-80)
  - Auburn Blvd (Sylvan Corners – Greenback Lane)
  - Auburn Blvd (Greenback Lane – Manzanita Avenue)
  - Antelope Road (Auburn Blvd – Old Auburn Road)
  - Dewey Drive (Greenback Lane – Connemara Circle)
  - Fair Oaks Blvd (Oak Avenue – Madison Avenue)
  - Greenback Lane (Sunrise Blvd – Fair Oaks Blvd)
  - Oak Avenue (Sunrise Blvd – Wachtel Way)
  - Old Auburn Road (Sylvan Corners – Roseville City Limit)
  - Roseville Road (Butternut Drive – City Limit)

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

- San Juan Avenue (Madison Avenue – Sylvan Road)
- Sunrise Blvd (Sayonara Drive – North City Limit)\*
- Sylvan Road (San Juan Avenue – Sylvan Corners)
- Wachtel Way (Oak Avenue – Auburn Road)
- Van Maren Lane (Greenback Lane – Garden Gate Drive)
- Antelope Road/I-80 Interchange (bike, pedestrian, Americans with Disabilities Act and congestion relief improvements)
- Implementation of intelligent transportation system improvements
- Implementation of a bicycle master plan
- Implementation of a pedestrian master plan
- Implementation of an Americans with Disabilities Act transition plan
- Support of a local transportation management agency

### **Elk Grove (10.99%)**

**\$ 348,820,000.00**

- 
- “Fix It First” street maintenance and rehabilitation
  - Widen, rebuild, and extend Kammerer Road\*\*
  - Construct SR-99 at Whitelock Parkway Interchange\*\*
  - Implementation of an intelligent transportation system master plan
  - Signal maintenance and rehabilitation
  - Citywide “complete streets” improvements
  - Implementation of bicycle, pedestrian, trails, and Americans with Disabilities Act master plans
  - Trail maintenance and rehabilitation, including:
    - Laguna Creek Trail
    - Elk Grove Creek Trail
    - Powerline Trail
    - Stone Lake Trail
  - Congestion reduction on Elk Grove Blvd\*\*
  - Congestion reduction on Laguna Blvd/Bond Road\*\*
  - Pedestrian overcrossing of UPRR on Elk Grove Blvd
  - Pedestrian overcrossing of UPRR on Laguna Blvd
  - Support of a local transportation management agency

### **Folsom (5.29%)**

**\$ 167,900,000.00**

- 
- “Fix It First” street maintenance and rehabilitation
  - Construct US-50 at Empire Ranch Road Interchange\*\*
  - Construct US-50 at Oak Avenue Parkway Interchange\*\*
  - Construct US-50 Rowberry Overcrossing between Oak Avenue Pkwy and Prairie City Road\*\*
  - Widen White Rock Road (Prairie City Road – Empire Ranch Road)
  - Folsom Blvd bicycle overcrossing
  - Implementation of an intelligent transportation systems master plan
  - Implementation of a bicycle master plan
  - Implementation of a pedestrian master plan
  - Implementation of an Americans with Disabilities Act transition plan
  - Folsom Lake State Recreation Area Trail improvements
  - Support of a local transportation management agency

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

**Galt (1.70%)** **\$ 53,960,000.00**

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- “Fix It First” street maintenance and rehabilitation
- Construct SR-99 at Walnut Avenue Interchange\*\*
- Implementation of a bicycle master plan
- Implementation of a pedestrian master plan
- Implementation of an Americans with Disabilities Act transition plan
- Carillion Blvd “complete streets” improvements
- Support of a local transportation management agency

**Isleton (Fixed Amount)** **\$ 2,000,000.00**

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- “Fix It First” street maintenance and rehabilitation
- Community Center Americans with Disabilities Act ramps and parking lot rehabilitation
- Safety lights for Tower Park and Ride Lot
- Electric vehicle charging stations
- Dock/ferry station rehabilitation
- Implementation of a green streets plan
- Pilot program shuttle, Isleton to E-Bart station
- Support of a local transportation management agency

**Rancho Cordova (5.09%)** **\$ 161,560,000.00**

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- “Fix It First” street maintenance and rehabilitation
- Construct US-50 at Rancho Cordova Parkway Interchange, including the Interchange at US-50 to White Rock Road\*\*
- Widen White Rock Road (Sunrise Blvd – Grant Line Road)
- Widen Douglas Road (Sunrise Blvd – Western City Limit with Bridge over Folsom South Canal)
- “Complete streets” improvements to Sunrise Blvd (Folsom Blvd – Jackson Highway)\*
- “Complete streets” improvements to Mather Field Road
- “Complete streets” improvements to Coloma Road
- Zinfandel bicycle and pedestrian US-50 overcrossing
- Implementation of a bicycle master plan
- Implementation of a pedestrian master plan
- Implementation of an Americans with Disabilities Act transition plan
- American River Parkway improvements
- Support of a local transportation management agency

**City of Sacramento (31.27%)** **\$ 992,510,000.00**

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- “Fix It First” maintenance and rehabilitation (to include “complete streets” and safety elements whenever feasible)
- Implementation of an intelligent transportation system master plan
- Implementation of a vision zero action plan, including improvements related to high injury networks and safe routes to school
- “Complete streets” improvements, including:
  - Stockton Blvd\*
  - Franklin Blvd

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

- Fruitridge Road
- Northgate Blvd
- Meadowview Road/24th Street
- Broadway
- Implementation of an active transportation plan, including
  - Implementation of a bikeway master plan
  - Implementation of a pedestrian master plan
- Accessibility improvements
- Pedestrian and bicycle safety improvements
- 14th Avenue extension
- 67th Street bike/pedestrian tunnel to CSUS
- Operations and security
- Support of strategic local transportation management agency initiatives
- Parking facilities

**County of Sacramento (40.36%)**

**\$ 1,281,030,000.00**

- “Fix It First” street maintenance and rehabilitation
- “Fix It First” bridge maintenance, rehabilitation, and replacement
- “Fix It First” signal and ITS maintenance and rehabilitation
- Implementation of a local roadway safety plan (LRSP)
- Implementation of an active transportation plan, including a bicycle master plan and a pedestrian master plan
- Implementation of a smart region technology plan
- Implementation of an Americans with Disabilities Act transition plan
- Implementation of intelligent transportation systems
- Improve access to the American River Parkway
- American River Parkway improvements
- Support and construction of mobility hubs
- Infrastructure and support of MicroMobility and SharedMobility services
- Infrastructure and support of transportation demand management
- Hazel Avenue/US-50 Interchange\*\*
- North Watt Avenue at UPRR/Capitol Corridor Overcrossing
- Arterial corridor rehabilitation with “complete streets” improvements, intelligent transportation system improvements, and streetscape:
  - Arden Way (Ethan Way – Watt Avenue)\*
  - Auburn Blvd (Fulton Avenue – Manzanita Avenue)
  - Cypress Avenue (Edison Avenue – Manzanita Avenue)
  - El Camino Avenue (Ethan Way – Fair Oaks Blvd)
  - Elverta Road (Watt Avenue – Antelope Road)
  - Fair Oaks Blvd (Howe Avenue – Madison Avenue)\*\*
  - Folsom Blvd (Watt Avenue – Bradshaw Road)\*\*
  - Fulton Avenue (Auburn Blvd – Fair Oaks Blvd)
  - Garfield Avenue (Greenback Lane – Winding Way)
  - Greenback Lane (Hazel Avenue – Madison Avenue)
  - Howe Avenue (Auburn Blvd – Fair Oaks Blvd)
  - Madison Avenue (Watt Avenue – Sunrise Blvd)
  - Manzanita Avenue (Auburn Blvd – Fair Oaks Blvd)
  - Marconi Avenue (Howe Avenue – Fair Oaks Blvd)
  - Oak Avenue (Hazel Avenue – Folsom City Limit)
  - Pasadena Avenue (Cypress Avenue – Winding Way)
  - Power Inn Road (Florin Road – Calvine Road)
  - San Juan Avenue (Madison Avenue – Fair Oaks Blvd)
  - Stockton Blvd (North of 65<sup>th</sup> Street – Power Inn Road)

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

- Sunrise Blvd (Madison Avenue – Coloma Road)
- Watt Avenue (Capital City Freeway – Fair Oaks Blvd)\*\*
- 47<sup>th</sup> Avenue (Franklin Blvd – Stockton Blvd)
- Other locations with similar needs
- Road capacity expansion with “complete streets” and intelligent transportation system improvements:
  - Antelope Road (Watt Avenue – Roseville Road)
  - Bradshaw Road (Old Placerville Road – Calvine Road)
  - Calvine Road (Power Inn Road – Grant Line Road)
  - Douglas Road (Rancho Cordova City Limit – Kiefer Blvd)
  - Elkhorn Blvd (Rio Linda Blvd – I-80)
  - Elverta Road (SR-99 – Watt Avenue)
  - Greenback Lane (Fair Oaks Blvd – Hazel Avenue)
  - Hazel Avenue (Placer County Line to Madison Avenue)
  - Jackson Highway (Watt Avenue – Grant Line Road)
  - Madison Avenue (Sunrise Blvd – Greenback Lane)
  - North Watt Avenue (Antelope Road – Capital City Freeway)
  - Roseville Road (Airbase Drive – Placer County Line)
  - South Watt Avenue/Elk Grove-Florin Road (Kiefer Blvd – Calvine Road)\*\*
  - Sunrise Blvd (Jackson Highway – Grant Line Road)\*\*
  - Other locations with similar needs
- Support of a local transportation management agency

**LOCAL STREETS AND ROADS**

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<b>Local Projects of Regional Significance (8.53%)</b>	<b>\$ 700,000,000.00</b>
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8.53% of all annual net tax revenues generated by this Measure shall be allocated to the Implementing Agencies listed in this category to fund projects within the boundaries of these agencies that provide a regional benefit to the overall transportation network. These projects include construction or modifications to interchanges interfacing with state highways, and projects that are required for mitigation purposes for new or expanded access to the system improvements to local arterials that promote regional connectivity. The interchange projects listed will require a federal, state, local, and/or developer match of at least one-third of the cost of the improvement. Allocations are reflected in the percentage allocations below, which take into account population, lane miles, and sales tax generation, and funding will be provided to local jurisdictions for expenditure on these specific projects only. Implementing Agencies are shown for each project.

<b>Citrus Heights (3.60%)</b>	<b>\$ 25,200,000.00</b>
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- Auburn Blvd Phase II (Rusch Park – I-80\*\*)
- Madison Avenue Corridor (Fair Oaks Blvd – San Juan Avenue)
- Sunrise Blvd (Sayonara Drive – Madison Avenue)\*\*
- Antelope Road/I-80 Interchange (bike, pedestrian, Americans with Disabilities Act, and congestion relief improvements)\*\*

<b>Elk Grove (10.20%)</b>	<b>\$ 71,400,000.00</b>
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- Whitelock Parkway/SR-99 Interchange\*\*
- Elk Grove Blvd congestion relief\*\*
- Laguna Blvd/Bond Road congestion relief\*\*

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

**Folsom (10.50%)** **\$ 73,500,000.00**

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- Empire Ranch Road/US-50 Interchange\*\*
- Oak Avenue Parkway/US-50 Interchange\*\*
- East Bidwell/US-50 interchange improvements\*\*
- Rowberry Overcrossing/US-50 between Oak Avenue Pkwy and Prairie City Road\*\*
- Oak Avenue Parkway (Folsom-Auburn Road – American River Canyon Drive)
- Folsom-Auburn Road at Folsom Lake Crossing
- Folsom Blvd/Blue Ravine Road Rail/Trail Grade Separation

**Galt (1.20%)** **\$ 8,400,000.00**

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- Walnut Avenue/SR-99 Interchange\*\*

**Isleton (0.10%)** **\$ 700,000.00**

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- Local street and road repair
- SR-160 safety plan

**Rancho Cordova (10.50%)** **\$ 73,500,000.00**

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- Rancho Cordova Parkway/US-50 Interchange, including the Interchange at US-50 to White Rock Road\*\*
- White Rock Road complete streets (Sunrise Blvd – Grant Line Road)
- Widen Douglas Road (Sunrise Blvd – West City Limit)\*\*

**City of Sacramento (30.20%)** **\$ 211,400,000.00**

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- Richards Blvd/I-5 Interchange
- Mack Road/SR-99 Interchange (safety improvements)
- 65th Street/US-50 Interchange
- I Street Bridge replacement (Railyards Blvd) over Sacramento River
- American River Bridge to South Natomas
- Broadway Bridge over Sacramento River
- Improvements to Cosumnes River Blvd (SR-99 – Franklin Blvd)
- West El Camino Avenue/I-80 Interchange
- Northgate Blvd/I-80 Interchange
- Sacramento River/American River/regional bike trails (development, patrol, and maintenance for those areas not covered by Sacramento County Parks)
- Intermodal Transportation Facility development

**County of Sacramento (33.70%)** **\$ 235,900,000.00**

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- Arden Way (Ethan Way – Watt Avenue)\*\*
- Bradshaw Road (Old Placerville Road – Calvine Road)\*\*
- Elverta Road (SR-99 – Antelope Road)
- Fair Oaks Blvd (Howe Avenue – Madison Avenue)\*\*



**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

- Folsom Blvd (Watt Avenue – Bradshaw Road)\*\*
- Hazel Avenue/US-50 Interchange\*\*
- Madison Avenue (Watt Avenue – Greenback Lane)
- Rural road shoulder and safety improvements
- South Watt Avenue/Elk Grove-Florin Road (Kiefer Blvd – Calvine Road)\*\*
- Sunrise Blvd (Jackson Highway – Grant Line Road)\*\*
- Watt Avenue (Capital City Freeway – Fair Oaks Blvd)\*\*
- 47<sup>th</sup> Avenue (Franklin Blvd – Stockton Blvd)

\* Includes implementation of SacRT High Capacity Corridor

\*\*Project may also be included in another category

**SACRAMENTO REGIONAL TRANSIT DISTRICT (SacRT)  
MAINTENANCE, OPERATIONS, AND TRANSFORMATIVE  
SYSTEM IMPROVEMENTS (25.11%)**

**\$ 2,060,000,000.00**

25.11% of all annual net tax revenues generated by this Measure shall be allocated monthly to SacRT for the transit equivalent of “Fix It First” along with needed operational and other transformative improvements. For the first five years following implementation of this Measure, not less than one-third of these funds will be spent on operational needs to achieve a state of good repair of the transit system, bus and light rail vehicle replacement, safety, security, and continuation of the RydeFreeRT fare assistance program for students/youth in grades K-12 as well as fare assistance for senior, disabled, student, and low-income passengers. During this period, SacRT will only be eligible for this funding to the extent performance metrics in the following categories are met:

1. Performance goals and industry standards for the percentage of buses and light rail vehicles that meet or exceed useful vehicle life or average vehicle age benchmarks;
2. Performance goals and industry standards for miles between road calls, on-time performance, missed trips, and safety/security key performance indicators; and
3. Performance goals and industry standards consistent with generally applicable state law, including the California Transportation Development Act (TDA) goals and requirements, as may be amended from time to time, which currently include meeting minimum farebox recovery ratio requirements and independent performance audits conducted every three years.

Other investments with these funds are intended to provide for improved access for the senior and disabled populations, fare subsidies for transit-dependent riders, financial support for expanded light rail operations, and the implementation of innovative services that will improve transit connections and encourage increased ridership. The following projects will be eligible for funding through this category:

- Increase bus and rail service frequency, and span of coverage
- Continuation of RydeFreeRT (Grades K-12)
- State of good repair, bus replacement, safety, security, and facilities
- Fare subsidy program for seniors and low-income passengers
- Low-floor trains systemwide
- Americans with Disabilities Act upgrades for bus and rail, including station upgrades to accommodate low-floor trains
- Full zero emission replacement buses
- Innovative transit-oriented development
- On-demand transit such as SmaRT Ride type programs
- Florin Station transit-oriented development partnership (\$1.0 million)
- SmaRT Ride Microtransit program

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

**CONGESTION RELIEF IMPROVEMENTS (22.43%) \$ 1,840,000,000.00**

22.43% of all annual net sales revenues generated by this Measure shall be allocated to the Implementing Agencies indicated for highway, transit, or rail projects that reduce congestion, expand capacity, improve operations, and enhance access to the transportation system. Allocations of funding to Caltrans for highway congestion improvements will be used by the department for both project development and capital expenses associated with the projects listed and will provide matching leverage for additional state and federal dollars. Allocations of funding to the Capital Southeast Connector Joint Powers Authority for the Capital Southeast Connector project shall be allocated monthly and will be used for project management and development and capital expenses associated with the project. To help mitigate regional greenhouse gas emissions and in furtherance of the region’s sustainable communities strategy, the Capital Southeast Connector Joint Powers Authority will consult with SacRT to develop a transit component for the project at appropriate locations. Proposed allocation amounts for SacRT bus and light rail projects included as transit and rail congestion improvements are intended to be flexible to allow for the transit agency to best apply the available funding to achieve the maximum benefit in matching funds from state and federal sources.

**Transit and Rail Congestion Improvement Projects (10.85%) \$ 890,000,000.00**

10.85% of all annual net tax revenues generated by this Measure shall be allocated on a monthly basis to SacRT for transit and rail projects that reduce congestion, expand capacity, improve operations, and enhance access to the transportation system. The proposed allocation amounts for bus and light rail projects are intended to be flexible to allow for SacRT to best apply the funding to achieve the maximum benefit in matching funds from state and federal resources.

- Capital improvement projects:
  - LRT peak service trains
  - LRT extensions, Green Line to the airport, Blue Line to Elk Gove and Citrus Heights, Gold Line to Folsom
  - High capacity bus corridor network throughout Sacramento County, including but not limited to Stockton Blvd, Watt Ave, Sunrise Blvd, Florin Rd, and Arden Way
  - BRT to Citrus Heights, Stockton Blvd, and Sunrise in Rancho Cordova
  - In coordination with the Capital Southeast Connector Joint Powers Authority, design, plan and construct a transit component, such as a bus rapid transit service, along the Capital Southeast Connector corridor to mitigate greenhouse gas (GHG) emissions and meet air quality targets. SacRT will match \$40 million in revenues generated by this Measure with \$80 million in state and federal funds for a total of \$120 million in resources toward this goal. The project would consist of providing signaling and a bypass at critical connector sections to improve service, lower travel time, and reduce GHG impacts

**Highway Congestion Improvement Projects (11.58%) \$ 950,000,000.00**

11.58% of all annual net tax revenue generated by this Measure shall be allocated to Caltrans and the Capital Southeast Connector Joint Powers Authority for highway congestion improvement projects, including state highway improvements and the Capital Southeast Connector project in Sacramento County. Allocations of funding to Caltrans will be used by the department for both project development and capital expenses associated with the projects included in this category and the funding is intended to provide matching leverage for additional state and federal dollars to ultimately complete the identified projects. Allocations of funding to the Capital Southeast Connector Joint Powers Authority will be used for project management and development and capital expenses associated with the project. To help mitigate regional greenhouse gas emissions, the Capital Southeast Connector Joint Powers Authority will consult with SacRT in the development of a transit component, such as a bus rapid transit service, for appropriate locations on the Connector Road between I-5 and the El Dorado County Line.

- Caltrans  
(7.92% of all annual net tax revenue generated by this Measure) \$ 650,000,000.00
  - Capital City Freeway Bus/Carpool Lanes (I-80 – P Street)
  - I-5 Bus/Carpool Lanes (US-50 – SMF)
  - I-5/I-80 Interchange complex improvements

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

- I-5/US-50 Interchange complex improvements
- SR-99/US-50/Bus-80 Interchange complex improvements
- SR-99 Bus/Carpool Lanes (I-5 to Sac/Sutter County Line)
- I-5/SR-99 interchange complex improvements
- Capital Southeast Connector Joint Powers Authority for Capital Southeast Connector (I-5 – US-50)  
(3.66% of annual net tax revenue generated by this Measure) \$ 300,000,000.00

**SENIOR AND DISABLED TRANSPORTATION SERVICES (3.05%) \$ 250,000,000.00**

3.05% of all annual net tax revenues generated by this Measure shall be allocated to SacRT and any designated Consolidated Transportation Services Agency to provide transit services for Sacramento County’s senior and disabled populations, including vehicle acquisition, operations of Americans with Disabilities Act and Non-Americans with Disabilities Act demand response service and maintenance, development and implementation of scheduling, communications, and service delivery technology to improve customer interface, senior and disabled low-fare discount programs, planning and implementation of new services to accommodate a growing customer base, such as SacRT’s SmartRide service, or other similar services, for senior and disabled populations, maintenance and delivery of social services transportation, mobility training, and other innovative mobility management programs designed for elderly and disabled populations. These funds shall be split 80% to SacRT and 20% to designated transportation services agencies.

**AIR QUALITY (2.16%) \$ 177,500,000.00**

2.16% of all annual net tax revenues generated by this Measure shall be allocated to the Sacramento Metropolitan Air Quality Management District (SMAQMD) to provide funding for monitoring, planning, emission reduction, and future mobility programs to promote clean air, mitigate climate change and transportation pollution, respond to wildfire smoke impacts, and achieve and maintain health-based air quality standards and low-carbon development goals. Pursuant to generally applicable law, meeting these standards as demonstrated in an approved State Implementation Plan for the Sacramento Region is a legally binding requirement for the region to receive federal funds for road widening, new roads, and other infrastructure projects. The funds will also leverage millions in State dollars to support other regional efforts for active transportation and land use, electrification of the transportation sector, and future mobility options, including deployment of electric school buses, electric transit for first- and last-mile trips, electric charging and hydrogen fueling infrastructure, and micro-mobility shared uses.

*Percentages may not add to 100% due to rounding.*

**IV. “Off the Top” and Program Administration & Independent Taxpayer Oversight Expenditures**

The following projects/items are authorized “Off the Top” and Program Administration & Independent Taxpayer Oversight expenditures pursuant to Sections I.B and I.P, respectively herein, and are not subject to the percentage-based net revenue allocations within spending categories as set forth above in Section III:

**REGIONAL MOBILITY CENTER \$ 20,000,000.00**

\$500,000 in annual tax revenues generated by this Measure, not to exceed \$20 million for the Program Period, shall be available to the City of Sacramento for a Regional Mobility Center to provide funding in collaboration with other public and private entities, for a center to foster innovation in clean transportation, including electric and automated vehicle technology, to develop future smart mobility solutions for the region.

The center will provide a platform for industry innovators, educational institutions, and clean tech regulators to conduct research and development work to create new technology and hardware, and provide a supportive regional environment to attract and grow transformative mobility startup businesses in the area, adding new jobs and

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

stimulating investment in clean and innovative mobility solutions. The center will also contribute to machinery and equipment costs that will be used to train a future workforce for the clean mobility sector.

**COMMUTER RAIL SERVICE ENHANCEMENTS** **\$ 80,000,000.00**

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\$2 million in annual tax revenues generated by this Measure, not to exceed \$80 million for the Program Period, shall be available to the San Joaquin Regional Rail Commission for operations and service enhancements related to the Altamont Corridor Express (ACE) service that benefit Sacramento County residents. Determination of that benefit shall be based on the route-miles of ACE service and the number of stations served by ACE in Sacramento County.

**SACRAMENTO INTERMODAL TRANSPORTATION FACILITY** **\$ 40,000,000.00**

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\$1 million in annual tax revenues generated by this Measure, not to exceed \$40 million for the Program Period, shall be available to the City of Sacramento for support of operations related to the Sacramento Intermodal Transportation Facility.

**TRANSPORTATION MANAGEMENT AGENCIES** **\$ 8,000,000.00**

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\$200,000 in annual tax revenues generated by this Measure, not to exceed \$8 million for the Program Period, shall be available to SACOG and the Sacramento Metropolitan Air Quality Management District (SMAQMD) to support the activities of Transportation Management Agencies in Sacramento County. Allocation details and program performance metrics will be developed by SACOG and SMAQMD in coordination with County Transportation Management Agencies prior to April 1, 2023, and subject to approval of the Authority.

**AMERICAN RIVER PARKWAY** **\$ 64,000,000.00**

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Not more than \$64 million in tax revenues generated by this Measure will be dedicated to the County of Sacramento, Department of Regional Parks, for the American River Parkway. The available funds will be allocated as follows: \$1 million per year from April 1, 2023, through March 31, 2039, and \$2 million per year for the remaining Program Period. Activities funded through this program will be coordinated with the appropriate jurisdictions in which the Parkway is located and projects eligible for funding shall include trail maintenance and rehabilitation, habitat preservation, and safety programs for trail segments where crime and safety conditions are an identified problem, so as to preserve and enhance active transportation use.

**PROGRAM ADMINISTRATION & INDEPENDENT TAXPAYER OVERSIGHT** **\$ 85,000,000.00**  
**(1.00% "Off the Top")**

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Not more than 1.00% of all annual gross tax revenues generated by this Measure, after deductions for the collection costs of the CDTFA, shall be available for program administration and independent taxpayer oversight of the Measure. The 1% limitation applies to administrative expenditures and support of the Independent Taxpayer Oversight Committee. The Authority may consider increasing the Program Administration allocation up to 1.5% through an Expenditure Plan amendment, as provided for in Sections V and XIII of this Measure, which increase shall only be effective after the expiration of the Existing Tax.

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**

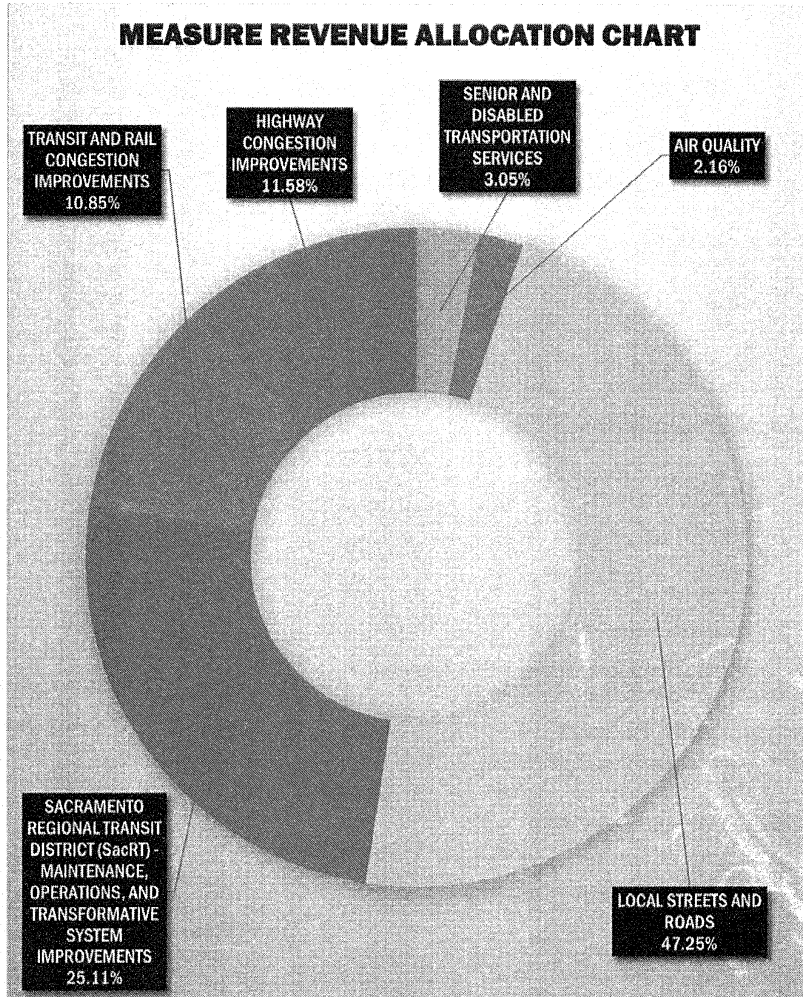
The following charts reflect the estimated allocation of revenue generated by the Measure to Implementing Agencies for eligible projects within each Measure Revenue Percentage Allocation Spending Category set forth in this Expenditure Plan:

**PROPOSED MEASURE REVENUE ALLOCATIONS**

(All dollar figures are estimates and are stated in millions of dollars)

<b>LOCAL STREETS AND ROADS</b>	<b>47.25%</b>	<b>\$ 3,876,000,000</b>
<b>Local Street and Road Repair and Transformative System Improvements</b>		
	<b>38.72%</b>	<b>\$ 3,176,000,000</b>
Citrus Heights	5.29%	\$ 167,900,000
Elk Grove	10.99%	\$ 348,820,000
Folsom	5.29%	\$ 167,900,000
Galt	1.70%	\$ 53,960,000
Isleton	Fixed Amount	\$ 2,000,000
Rancho Cordova	5.09%	\$ 161,560,000
City of Sacramento	31.27%	\$ 992,510,000
County of Sacramento	40.36%	\$ 1,281,030,000
<b>Local Projects of Regional Significance</b>		
	<b>8.53%</b>	<b>\$ 700,000,000</b>
Citrus Heights	3.60%	\$ 25,200,000
Elk Grove	10.20%	\$ 71,400,000
Folsom	10.50%	\$ 73,500,000
Galt	1.20%	\$ 8,400,000
Isleton	0.10%	\$ 700,000
Rancho Cordova	10.50%	\$ 73,500,000
City of Sacramento	30.20%	\$ 211,400,000
County of Sacramento	33.70%	\$ 235,900,000
<b>SACRAMENTO REGIONAL TRANSIT DISTRICT (SacRT) - MAINTENANCE, OPERATIONS, AND TRANSFORMATIVE SYSTEM IMPROVEMENTS</b>	<b>25.11%</b>	<b>\$ 2,060,000,000</b>
<b>CONGESTION RELIEF IMPROVEMENTS</b>	<b>22.43%</b>	<b>\$ 1,840,000,000</b>
<b>Transit and Rail Congestion Improvement Projects</b>		
	<b>10.85%</b>	<b>\$ 890,000,000</b>
<b>Highway Congestion Improvement Projects</b>		
	<b>11.58%</b>	<b>\$ 950,000,000</b>
<b>SENIOR AND DISABLED TRANSPORTATION SERVICES</b>	<b>3.05%</b>	<b>\$ 250,000,000</b>
<b>AIR QUALITY</b>	<b>2.16%</b>	<b>\$ 177,500,000</b>
<b>REGIONAL MOBILITY CENTER</b>		<b>\$ 20,000,000</b>
<b>COMMUTER RAIL SERVICE ENHANCEMENTS</b>		<b>\$ 80,000,000</b>
<b>SACRAMENTO INTERMODAL TRANSPORTATION FACILITY</b>		<b>\$ 40,000,000</b>
<b>TRANSPORTATION MANAGEMENT AGENCIES</b>		<b>\$ 8,000,000</b>
<b>AMERICAN RIVER PARKWAY</b>		<b>\$ 64,000,000</b>
<b>PROGRAM ADMINISTRATION &amp; INDEPENDENT TAXPAYER OVERSIGHT</b>	<b>1.00% off the top</b>	<b>\$ 85,000,000</b>
<b>TOTAL MEASURE REVENUE ALLOCATIONS</b>		<b>\$ 8,500,500,000</b>

**INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS**



"Percentages are net of any applicable required California Department of Tax and Fee Administration (CDTFA) collection fees as well as Authority Program Administration and Independent Taxpayer Oversight costs (1% of all annual gross tax revenues generated by the Measure) and direct allocation of fixed dollar amounts to a Regional Mobility Center, Commuter Rail Service Enhancements, the Sacramento Intermodal Transportation Facility, Transportation Management Agencies, and the American River Parkway."

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

### EXHIBIT B

#### INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE

##### A. Background.

In 2004, when Authority voters approved the Existing Tax, they required the creation of the Independent Taxpayer Oversight Committee (“ITOC”) to review the fiscal and program performance of the Existing Tax transportation program through an annual audit, to ensure that all Existing Tax funds are spent by the Authority in accordance with all provisions of the voter-approved Existing Tax expenditure plan and measure. The ITOC’s other mission is to provide positive, constructive advice to the Authority on how to improve implementation over the thirty-year course of the Existing Tax program for the benefit of Sacramento County residents and businesses, and to study and report on other issues related to the current or future use of transportation tax funds that may be expressly authorized by the Authority Board.

Per prior voter approval, ITOC members are selected pursuant to an open selection process that actively advertises for potential members and selects three ITOC members who are residents of Sacramento County and possess the following professional and/or community credentials:

- One member who is a professional—active or retired—in the field of municipal audit, finance and/or budgeting with at least five years in a relevant and senior decision-making position in the public or private sector.
- One member who is a licensed civil engineer or trained transportation planner—active or retired—with at least five years of demonstrated experience in the field of transportation in government and/or the private sector.
- One member who is a current or retired manager of major public and/or privately financed development or construction projects, who by training and experience would understand the complexity, costs, and implementation issues involved in building large scale infrastructure improvements.

Additionally, the Chair of the Authority Governing Board, the Executive Director of the Authority, and the County Auditor shall serve as ex-officio non-voting members of the ITOC.

Authority voters, when requiring the creation of the ITOC in 2004, also imposed the following terms and conditions on ITOC members:

- Members shall serve staggered four-year terms. In no case shall any voting committee member serve more than eight years on the ITOC.
- Members shall serve without compensation, except they shall be reimbursed for authorized travel and other expenses directly related to the work of the ITOC.
- Members cannot be current local elected officials in the county or a full time or part time staff member of any city, the county government, local transit operator, or state transportation agency.
- If and when vacancies on the ITOC occur on the part of voting ITOC members, the Authority shall appoint an appropriate replacement within 90 days of the vacancy to fill the remainder of the term.
- **Conflict of Interest Prohibition:** ITOC voting members are prohibited from acting in any commercial activity directly or indirectly involving the Authority, such as being a consultant or vendor to the Authority during their tenure on the ITOC. ITOC voting members shall not have direct commercial interest or employment with any public or private entity that receives transportation tax funds authorized by the voters.

##### B. Extension and Expansion of Authorization for the Independent Taxpayer Oversight Committee

In order ensure comprehensive oversight of the tax revenues generated by this Measure, while at the same time

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

avoiding unnecessary duplication of administrative costs with respect to the ITOC's current oversight of the Existing Tax revenues, voters hereby require the continuation and extension of the ITOC's authority and mandatory obligations as follows:

- 1. Required ITOC Oversight of Measure funds and Expenditure Plan.** The ITOC shall supervise regular audits to assess the fiscal and program performance of this Measure's transportation tax program to ensure that all tax funds generated by this Measure are expended effectively and in accordance with the provisions of this Measure, including the Expenditure Plan. The ITOC shall also provide constructive advice to the Authority Board and staff on how to improve program implementation, and will study and report on other issues related to current or future administration of this Measure's tax funds.

The ITOC shall continue as long as funds from the tax approved by this Measure are made available. The Authority Board and staff shall fully cooperate with and provide necessary financial and staff support to ensure that the ITOC effectively carries out its duties and obligations. The annual cost of the new/additional activities of ITOC pursuant to the Measure shall not exceed \$150,000, adjusted for inflation, and shall be derived from the one percent (1.0%) of annual tax funds earmarked for Authority administration.

- 2. ITOC Membership and Selection Requirements.** The composition of the ITOC, eligibility for membership, service terms, and the process for selecting and replacing members, including but not limited to when the Existing Tax expires, and the provisions prohibiting conflicts of interest will be as set forth herein above, consistent with voters' intent for a single ITOC to oversee both the Existing Tax program and the tax program adopted by this Measure. Notwithstanding the foregoing, given the anticipated increased demands on the ITOC in light of its new responsibilities with respect to the tax program adopted by this Measure, the Authority is authorized to add up to two additional ITOC members, subject to the same policies and requirements set forth herein above, except the eligibility for membership of the two additional members shall be residents of Sacramento County whose community engagement and/or professional background have resulted in significant knowledge related to transportation, the County's mobility needs, and governmental processes.
- 3. Audit Requirement for Measure Funds and Tax Program.** The ITOC shall supervise annual fiscal audits and periodic performance audits of the Measure funds and tax program, which shall be performed in accordance with generally accepted auditing standards and government auditing standards issued by the Comptroller General of the United States, as may be amended from time to time. Performance audits will assess program performance relative to standards to be adopted by the Authority Board. The Board shall adopt program performance standards no later than April 1, 2023, and shall review said standards for currency at least every five years.
- 4. Role of Financial and Performance Audits.** The ITOC shall under the competitive procurement rules of the Authority consult with the Executive Director and the Authority Board regarding the selection of a professional auditing firm to conduct the fiscal and performance audits of the receipt and expenditure of all Measure funds. The ITOC will report audit results—with a detailed listing of findings—to the Authority Board and public. The ITOC will recommend additional audits or program review that it believes will improve the financial operation and integrity of program implementation, while meeting all voter mandates. No professional audit firm will conduct more than five consecutive annual fiscal audits. The Authority Board shall consider findings and recommendations from each annual audit at a publicly-noticed meeting. The annual audit report shall be made readily available to the public on the Authority's website.



**Ann Edwards**  
County Executive



**David Villanueva**  
Deputy County Executive  
Administrative Services

**Courtney Bailey-Kanelos**  
Registrar of Voters  
Voter Registration & Elections

## County of Sacramento

### REGISTRAR OF VOTERS CERTIFICATE OF INITIATIVE PETITION

I, Karalyn Fox, Election Manager of the County of Sacramento, State of California, hereby certify:

That the SACRAMENTO COUNTY TRANSPORTATION MAINTENANCE, SAFETY, AND CONGESTION RELIEF ACT OF 2022-RETAIL TRANSACTIONS AND USE TAX INITIATIVE petition was filed with this office on JUNE 10, 2022.

That said petition consists of 4,922 sections with 76,374 signatures. That each section contains signatures purporting to be the signatures of qualified electors of this county;

That attached to this petition at the time it was filed was an affidavit purporting to be the affidavit of the person who solicited the signatures, and containing the dates between which the purported qualified electors signed this petition;

That the affiant stated his/her own qualification, that s/he had solicited the signatures upon that section, that all of the signatures were made in his/her presence and that to the best of his/her knowledge and belief each signature to that section was the genuine signature of the person whose name it purports to be;

That after the proponent filed this petition, I verified 3% of signatures submitted by examining the records of registration in this county, to determine what number of qualified electors signed the petition, and from that examination, I have determined the following facts regarding this petition:

Number of signatures filed by proponent (raw count)	<b>76,374</b>
Number of signatures verified	<b>2,291</b>
Number of signatures found SUFFICIENT	<b>1,743</b>
Number of signatures found NOT SUFFICIENT	<b>548</b>
Not Sufficient because DUPLICATE	<b>0</b>

IN WITNESS THEREOF, I have hereunto set my hand this 12th day of JULY, 2022.

Karalyn Fox  
Elections Manager



## Signature Verification Calculations

### County Measures Submitted to Voters

EC Div. 9, Ch. 2, Art. 1 -- §§ 9100-9190

**Petition Title:** Sacramento County Transportation Maintenance Tax

#### Initiative Petition Calculations

**Number of votes last cast for governor:** 522,562  
EC 9107

**Total Signatures Submitted:** 76,374

Signatures needed to qualify for election: 52,256  
10% threshold -- EC 9118

The random sample shall include 500 signatures or 3% of those submitted, whichever is greater. EC 9115(a)

Number of signatures to verify: 2,291

**Number of valid signatures:** 1,743

**Number of duplicate signatures:** 0

#### SOS Signature Validation Formula

Factors	Description
A	Value of each signature
B	Penalty value for duplicate signature
C	Total value of all duplicate signatures
V	Adjusted number of valid signatures

Factor	Formula	
A	Total Signatures/signatures to verify = A	33.33653426
B	A x (A - 1) = B Penalty value for duplicate signatures	1077.99
C	B x duplicate penalty value = C	0.00
V	Signatures submitted x (valid signatures in sample/sample size) = V	58,106
<b>V - C = Statistically valid total</b>		<b>58,106</b>

If the statistical sample is within 95% to 110% of the required number signatures, the elections official must verify ALL petition signatures. EC 9115(b)

**Statistical total as percent of total needed: 111.19%**

### Measure Qualifies for Election



**JULY 27, 2022**

**AGENDA ITEM # 7**

**MEMORANDUM OF UNDERSTANDING REGARDING IMPLEMENTATION OF THE  
“SACRAMENTO COUNTY TRANSPORTATION MAINTENANCE, SAFETY AND CONGESTION  
RELIEF ACT OF 2022 - RETAIL TRANSACTIONS AND USE TAX”**

Action Requested: Authorize Executive Director to execute an MOU.

Key Staff: Kevin M. Bewsey, Executive Director  
Tim Jones, Chief Financial Officer

**Recommendation**

Staff recommends the STA Governing Board authorize the Executive Director to execute a Memorandum Of Understanding (MOU) regarding implementation of the “Sacramento County Transportation Maintenance, Safety And Congestion Relief Act Of 2022 - Retail Transactions And Use Tax”.

**Background**

In 1988, the Sacramento Transportation Authority (STA) was created when Sacramento County voters approved Measure A, a 20-year half-cent sales tax for transportation improvements. In 2004, voters approved a 30-year extension to the program. The two sales tax measures have generated approximately \$3 billion in transportation funding for the region. During this time, STA, in its role as program administrator, has distributed these funds and collaborated with the County of Sacramento and the Cities of Citrus Heights, Elk Grove, Folsom, Galt, Isleton, Rancho Cordova, and Sacramento, Caltrans, Sacramento Regional Transit, ParaTransit, Capital Southeast Connector, SACOG, and Sacramento Metropolitan Air Quality Management District.

Late in 2018, the STA began work on a new half-cent sales tax measure for the November 2020 ballot. The STA solicited a variety of public, stakeholder and agency input to better understand the unmet transportation needs of the region. This outreach was used to develop a Proposed 2020 Measure A Transportation Expenditure Plan. By May of 2020 the STA Governing Board had adopted the Proposed 2020 Measure and the Board of Supervisors and of the city councils of all the cities in the county had approved it. However, by July of 2020 the persistent impact of the coronavirus had created uncertainty. While a majority of voters were still willing to support the proposed measure, the level of support needed to reach the two-thirds voter approval did not warrant going forward with a ballot measure and the STA Governing Board withdrew their request to place the measure on the ballot.

In 2021, a citizens’ group known as “A Committee for a Better Sacramento” (“Committee”) began to draft and circulate a forty-year, \$8.5 billion transportation ballot initiative. This effort was done as a citizens’ initiative, unlike STA’s previous measures and requires a simple majority instead of a two-thirds voter approval. This citizens’ initiative was finalized in February 2022. The half-cent sales tax program is known as the Sacramento County Transportation Maintenance, Safety, and

Congestion Relief Act of 2022—Retail Transactions and Use Tax (the “Initiative”). The Committee drafted the Initiative as an STA ordinance and identifies STA as the administering agency responsible for the implementation of the requirements of this Initiative, including the Expenditure Plan. As such, STA will develop the necessary policies to implement and administer the Initiative. STA staff anticipates initiating the development of these policies in December 2022 in collaboration with the Professional Advisory Group (PAG) and other stakeholders before being presented to the STA Governing Board for approval.

STA staff will collaborate with SACOG, which is the federally designated metropolitan planning organization for the greater region and the regional transportation planning agency for Sacramento County, to ensure the Initiative’s implementation aligns with the region’s long-range emissions reduction targets as envisioned in Senate Bill 375. The Initiative requires that projects not impair the ability of the region to meet federal air quality conformity requirements and that project sponsors mitigate GHG impacts for such projects.

During the May 2022 SACOG Board meeting, an informational item titled “Review & Analysis of Proposed Citizens' Transportation Tax Initiative in Sacramento County” was presented. The analysis identified approximately 26 capacity expanding projects out of 225 projects which were not consistent with the region’s long-range transportation and land use plan called the Metropolitan Transportation Plan and Sustainable Communities Strategy (“MTP/SCS”). The analysis suggests that the region may fall short of meeting its state-mandated 19 percent per capita GHG reduction targets if these 26 capacity expanding projects are constructed on or before 2035. The analysis further suggests how the Initiative may negatively impact the region’s eligibility to compete for major state transportation and housing funding programs, if it falls short of these emission reduction targets.

Subsequently, SACOG, the City of Sacramento Mayor, and the Initiative Committee developed guidelines that further the goal of meeting long-term emission reductions targets. In early June, a proposed framework of agreement was reached and at the June 2022 SACOG Board meeting a framework of agreement was approved which can be found in attachment 2.

#### Framework of the Agreement

The June 9<sup>th</sup>, 2022 Agreement (“Framework”) states that the Committee has identified an estimated \$510 million in revenue, in addition to the \$8.5 billion in revenue projected in the Expenditure Plan. Based upon clarification from the Committee, the Initiative’s estimated tax revenue is conservative, and actual revenues could be approximately 6% higher due to recent inflationary effects. The Framework requests that recipient agencies pass resolutions acknowledging that the additional funds may be needed primarily for GHG mitigation efforts for projects not included in the MTP/SCS.

The Framework further defines the implementation of the Federal Air Quality Requirements and MTP & GHG Reduction Targets. Specifically, the Framework requires project sponsors to develop GHG mitigation measures. To ensure the most effective mitigation measures are in place and that the region’s long-range emissions reduction targets are met, STA will fund a SACOG study and a third-party analysis of the GHG impacts to be completed by December 31, 2023. The

Framework states that STA and project sponsors will follow SACOG's recommendation, If there is a significant deviation from the third-party review, the three-parties will meet and confer. Project sponsors will have to demonstrate to STA they can mitigate GHG impacts sufficiently to adhere to regional GHG reduction targets. SACOG would then consider any mitigated project in the next MTP/SCS.

The Framework includes the City of Sacramento committing \$100 million in Initiative funding to the California Mobility Center. The Center will foster innovation in clean transportation, including electric and automated vehicle technology, to develop future smart mobility solutions for the region.

The Framework requires SACOG, STA, the Committee, and the Capital SouthEast Connector JPA to each issue a public statement in support of the MOU and the agency's intent to implement the provisions of the Initiative. The Committee will reference this MOU in it's ballot argument in support of the Initiative.

### **Discussion**

The STA's experience in administering voter approved sales tax measures along with STA's close working relationships with project sponsors makes it a logical choice to administer this citizens' Initiative. In addition, STA regularly collaborates with SACOG to leverage Measure A funds. STA staff will build on these established relationships to ensure an effective and efficient implementation of the Citizen's Initiative. STA staff will ensure the final GHG mitigation reduction plan will use a transparent process with opportunities for review and comment at key milestones and while incorporating the priorities of the STA Governing Board and project sponsors.

The Final MOU, shown in attachment 3, varies slightly from the Framework. The MOU does not include any of the project sponsors as party to the MOU. So the City of Sacramento, Caltrans or the Capital SouthEast Connector JPA are not a party to the MOU. Additionally, STA would agree to a Transportation Funding Strategy Partnership with SACOG to help leverage regional, state, and federal transportation funding for projects or programs that are consistent with the MTP/SCS.

STA staff believes that this MOU is the best way to satisfactorily resolve GHG mitigation concerns. While the STA Governing Board could take alternative action such as a developing a GHG Implementation Policy or a GHG Implementation MOU between STA and SACOG, these actions do not appear to satisfy the concerned groups. Consequently, Staff recommends the STA Governing Board authorize the Executive Director to execute an MOU substantially similar to the MOU in Attachment 3, regarding implementation of the "Sacramento County Transportation Maintenance, Safety And Congestion Relief Act Of 2022 - Retail Transactions And Use Tax".

### **Fiscal Impact**

The proposed action would commit STA to funding and completing a SACOG study and third-party analysis by December 31, 2023. Funding for this work will come from the Initiative's spending categories that include capacity expanding projects not in the MTP/SCS.

Attachment(s)

1. Resolution
2. Framework of Agreement
3. MOU

SACRAMENTO TRANSPORTATION AUTHORITY

RESOLUTION NO. \_\_\_\_\_

**RESOLUTION OF THE SACRAMENTO TRANSPORTATION AUTHORITY  
AUTHORIZING THE EXECUTIVE DIRECTOR TO EXECUTE A MEMORANDUM OF  
UNDERSTANDING (MOU) REGARDING IMPLEMENTATION OF THE  
“SACRAMENTO COUNTY TRANSPORTATION MAINTENANCE, SAFETY AND  
CONGESTION RELIEF ACT OF 2022 - RETAIL TRANSACTIONS AND USE TAX”**

**WHEREAS**, the Committee For a Better Sacramento (Committee) independently drafted and circulated a local initiative petition entitled the “SACRAMENTO COUNTY TRANSPORTATION MAINTENANCE, SAFETY AND CONGESTION RELIEF ACT OF 2022 - RETAIL TRANSACTIONS AND USE TAX” (the “Initiative”) for signatures and has submitted the Initiative to the County of Sacramento Office of Voter Registration & Elections; and

**WHEREAS**, the Initiative was drafted as an ordinance of STA, to be administered and implemented by STA; and

**WHEREAS**, The Initiative contains Implementation Guidelines within its Expenditure Plan and sections J and K of the Implementation Guidelines require that projects funded by the Initiative shall not impair the ability of the region to meet federal air quality conformity requirements and maintain adherence to the then applicable regional greenhouse gas GHG reduction targets; and

**WHEREAS**, the Sacramento Area Council Of Governments (SACOG) is the federally designated metropolitan planning organization for the greater region and the regional transportation planning agency for Sacramento County as well as the counties of, Sutter, Yolo and Yuba; and

**WHEREAS**, SACOG is responsible for the region’s long-range transportation and

land use plan called the Metropolitan Transportation Plan and Sustainable Communities Strategy (“MTP/SCS”) which includes the region’s plan meet standards for reduction of GHG emissions as identified in State Senate Bill 375; and

**WHEREAS**, SACOG, City of Sacramento Mayor, and the Initiative Committee agreed upon a proposed framework for implementation of the Initiative, which was approved at the June 2022 SACOG Board of Directors meeting; and

**WHEREAS**, a MOU is needed with STA due to its role in administering and implementing the Initiative.

**NOW, THEREFORE, BE IT RESOLVED**, by the SACRAMENTO TRANSPORTATION AUTHORITY as follows:

1. **Authorize Executive Director.** The Governing Board of the SACRAMENTO TRANSPORTATION AUTHORITY hereby authorizes the Executive Director to execute an MOU regarding implementation of the “Sacramento County Transportation Maintenance, Safety And Congestion Relief Act Of 2022 - Retail Transactions And Use Tax”, in substantially similar form as that attached hereto. The MOU will be of no effect if the voters do not approve the Initiative.

On a motion by [Member] \_\_\_\_\_, seconded by [Member] \_\_\_\_\_, the foregoing Resolution was passed and adopted by the Governing Board of the Sacramento Transportation Authority at a regular meeting thereof this \_\_\_\_\_ day of \_\_\_\_\_ 202\_, by the following vote, to wit:

AYES: [Members],

NOES: [Members],

ABSENT: [Members],

ABSTAIN: [Members],

RECUSAL: [Members],  
(PER POLITICAL REFORM ACT (§ 18702.5.)



---

Chair of the Governing  
Body of the Sacramento  
Transportation Authority

(SEAL)

ATTEST: \_\_\_\_\_  
Clerk of the Governing Board of the  
Sacramento Transportation Authority

## JUNE 9<sup>TH</sup>, 2022 AGREEMENT

### **Other items:**

- City of Sacramento will contractually commit \$100M in measure funds to support the California Mobility Center prior to measure certification. This will be supported by Campaign.

### **MTP/SCS Deal:**

#### **Projects in the MTP/SCS are Eligible for Measure Funds without Further Requirements**

- Per the above, if a portion of an Expenditure Plan project is planned or programmed for Construction in the MTP/SCS, that portion of the Expenditure Plan project shall be eligible for Measure funds, without further requirements. Projects in the MTP/SCS for project development are available receive project development dollars.

#### **Prioritizing Additional Funds for GHG Mitigation**

- Based upon a clarification letter from the campaign, the Initiative's estimated tax revenue is conservative, and actual revenues could be approximately 6% higher due to recent inflationary effects. This means there may be over \$510 million in additional revenues which, per the Initiative's express terms, will be available for allocation pursuant to the Expenditure Plan's spending categories and, more specifically, for authorized uses on eligible projects, including for GHG mitigation efforts. Per the measure, additional funds are available for mitigation efforts without a cap. Since additional revenues over projections will go directly to recipient agencies on a pro-rata basis, recipient agencies can pledge that the use of these additional funds be used first for GHG Mitigation.

Action I: The Campaign will send a clarification letter to STA to add to the public record prior to certification that actual additional revenues available for mitigation could be \$510M.

Action II: STA and the Campaign will jointly request that recipient agencies pass resolutions prior to the measure's passage acknowledging that these additional revenues may be needed primarily for GHG mitigation efforts.

#### **Process for Projects not in the MTP/SCS must Mitigate for GHG to Receive Measure Funds**

- For projects that are not planned or programmed for construction in the MTP/SCS, project sponsors shall, in order to be eligible for Measure funds, develop mitigation measures for any projects that increase GHG emissions.
- STA will commission and fund a SACOG and a third-party analysis to provide a review of the entire measure, its capital projects not in the MTP/SCS, and its GHG impacts. This review must identify aggregate GHG impacts of the entire measure and mitigation efforts to cover the measure's aggregate GHG impacts. The analysis on both shall be complete by December 31, 2023. STA and project sponsors will follow SACOG's recommendation, if there is a significant deviation from the third-party review at which time the three-parties will meet and confer.
- Consistent with the analysis resulting from the process describe above, for projects not in the MTP/SCS, once a project sponsor has submitted to STA mitigation measures demonstrating that the project sponsor can mitigate any such project impacts to maintain adherence to the then applicable regional GHG reduction target, the project(s) shall be eligible for Measure funds. Therein, there should be no net increase to regional GHG emissions after mitigation measures are complete.
- SACOG will consider any mitigated project in the next MTP/SCS.

Action I: STA, the Campaign, SACOG, and the Connector JPA will work on drafting a four-party MOU to implement the process outlined above.

Action II: All parties will issue a public statement supporting the agreement and its intent to further the measure.

Action III: The Campaign will reference the agreed upon agreement in the "Yes" arguments for the campaign.

**MEMORANDUM OF UNDERSTANDING REGARDING IMPLEMENTATION OF THE “SACRAMENTO COUNTY TRANSPORTATION MAINTENANCE, SAFETY AND CONGESTION RELIEF ACT OF 2022 - RETAIL TRANSACTIONS AND USE TAX”**

THIS MEMORANDUM OF UNDERSTANDING (“MOU”) is made and entered into as of this \_\_\_\_ day of July 2022, by and between the SACRAMENTO AREA COUNCIL OF GOVERNMENTS, the metropolitan planning organization for the Sacramento region (“SACOG”), and the SACRAMENTO TRANSPORTATION AUTHORITY, a California transportation authority formed pursuant to Public Utilities Code section 180000, et seq. (“STA”) (collectively, the “Parties” or individually, a “Party”). The Committee for a Better Sacramento (“CBS”) is expressly acknowledging this MOU to confirm that the MOU is consistent with the provisions and intent of the citizens’ initiative, as detailed below.

**RECITALS:**

A. A primarily formed, citizens’ ballot measure committee known as Committee for a Better Sacramento, including voter proponent (“CBS”), independently drafted, circulated for voter signatures, and now qualified for the ballot, a local initiative petition titled the “SACRAMENTO COUNTY TRANSPORTATION MAINTENANCE, SAFETY AND CONGESTION RELIEF ACT OF 2022 - RETAIL TRANSACTIONS AND USE TAX” (the “Initiative”). No government officials serve on CBS’s board, CBS is not controlled by any government official or candidate for office, and no government officials were involved in drafting, filing, or circulating the Initiative for voter signatures.

B. The County of Sacramento Office of Voter Registration & Elections has determined that CBS collected more than the requisite number of valid, verified voter signatures to require the Initiative to be presented to voters of STA in November 2022. If approved by a majority of voters of STA voting in the election, the Initiative will establish a 0.5% transactions and use tax within STA (coterminous with Sacramento County) dedicated to funding transportation and transit projects.

C. As an initiative ordinance of STA, the Initiative will be administered and implemented by STA. The Initiative contains an expenditure plan which details how STA is to allocate Initiative revenues and fund projects, subject to the terms of the Initiative (the “Expenditure Plan”). Sections J and K of the Expenditure Plan require that projects funded by the Initiative shall not impair the ability of the region to meet federal air quality conformity requirements and acknowledge that the region must currently meet a 19% per capita greenhouse gas (“GHG”) emissions reduction target. Section K mandates that projects are only eligible to receive funds from the Initiative if the project sponsor can mitigate any such project impacts to maintain adherence to the then applicable regional GHG emissions reduction target, the project is already included in the MTP/SCS (as defined below), or the project is exempt from the GHG emissions reduction target (meaning the project does not increase transportation capacity and therefore does not increase GHG).

D. SACOG is the federally designated metropolitan planning organization for the greater six county Sacramento region and the regional transportation planning agency for Sacramento County as well as the counties of Sutter, Yolo and Yuba. Among other responsibilities, SACOG is responsible to plan for the region’s ability to meet standards for reduction of GHG emissions. As referenced in the Initiative,

federal and state laws require SACOG to develop a Metropolitan Transportation Plan and Sustainable Communities Strategy (“MTP/SCS”) that address GHG emissions reductions requirements. Under the federal and state regulatory framework, the California Air Resources Control Board (“ARB”) establishes passenger vehicle GHG emissions reduction targets that SACOG must meet through the MTP/SCS. SACOG works with ARB to determine an accurate method for measuring the greenhouse gas emissions performance of the MTP/SCS, and ARB ultimately determines whether the MTP/SCS would meet the established GHG emissions reduction target. SACOG has developed an MTP/SCS that is designed to achieve the region’s GHG reduction targets, and SACOG engages in detailed annual monitoring of actual performance of the GHG emissions reductions.

E. The Initiative directs revenues to fund, subject to the Initiative’s requirements, certain capital projects, including but not limited to certain Caltrans projects and portions of the Capital Southeast Connector project, that are not currently planned or programmed for construction in the MTP/SCS and will therefore have to mitigate GHG emissions in order to be eligible to use Initiative funds for construction.

F. Through this MOU, the Parties intend to set forth a structure to implement the provisions of Sections J and K of the Expenditure Plan to establish whether projects that are not within the MTP/SCS will be eligible to receive Initiative funds, as per the terms of the Initiative. This MOU is necessary to establish a framework for intergovernmental cooperation between the STA, as the agency responsible for the Initiative funds, and SACOG, as the agency responsible for planning for, and implementation of, the GHG emissions reductions target. This will help ensure that the agencies which may receive funding for projects requiring mitigation will effectively achieve sufficient GHG mitigation and avoid impacting the region’s ability to meet GHG reduction targets. This MOU also confirms that the implementation provisions contained in this MOU are consistent with both the text of the Initiative and CBS’ intent in preparing the Initiative and submitting it to the voters; nothing in this MOU is intended to alter or in any way change the language as set forth in the Initiative qualified for the ballot by the voters. Finally, by documenting the mutual understandings of the Parties prior to the election, the Parties hereto are better positioned to convey objective information to the voters and the Parties’ various member agencies regarding the Initiative’s implementation if adopted.

**NOW, THEREFORE,** the Parties have reached the following understandings, and for good and valuable consideration, which is hereby acknowledged and received, the Parties set forth their understandings, together with CBS’s confirmation that the provisions are consistent with the Initiative, as follows:

1. **Recitals.** The Parties and CBS acknowledge and agree that the Recitals are true and correct statements. The Parties’ understandings set forth in this MOU are made in reliance upon the Recitals, as well as upon the confirmation by CBS pursuant to paragraph 8, below.
2. **Prioritizing Additional Funds for GHG Mitigation.** CBS has informed the Parties that the Initiative’s estimate of tax revenues is conservative and actual revenues could be approximately 6% higher. This means there may be over \$500 million in additional revenues which, per the Initiative’s express terms, will be available for allocation pursuant to the Expenditure Plan’s spending categories and, more specifically, for authorized uses on eligible projects, including for GHG mitigation efforts. Additional Initiative funds are available for mitigation efforts without a cap, and will be prioritized

for this purpose. Since additional revenues over projections will go directly to recipient agencies on a pro-rata basis, recipient agencies can pledge that the use of a portion of these additional funds be used first for GHG mitigation. This section shall not be construed to limit or eliminate any mitigation obligations under the Initiative or as set forth in this MOU.

2.1. STA and CBS will each request that recipient agencies pass resolutions acknowledging that additional revenues may be needed primarily for GHG mitigation efforts for projects not included in the MTP/SCS.

3. **Process for Projects Not In MTP/SCS.** For projects that are not planned or programmed for construction in the MTP/SCS, project sponsors shall, in order to be eligible for Initiative funds, develop mitigation measures to achieve the necessary reduction target for regional GHG emissions. With the mitigation measures, there should be no net increase to regional GHG emissions from the MTP/SCS. STA will commission and fund a SACOG study, and a third-party analysis, to provide a review of the entire Initiative, its capital projects not in the MTP/SCS, and its GHG impacts. This review must identify aggregate GHG impacts of the entire Initiative and mitigation efforts to cover the Initiative's aggregate GHG impacts. The SACOG study and third-party review shall be completed by December 31, 2023.

3.1. In implementing the GHG mitigation process for projects not in the MTP/SCS, the following shall apply:

- (1) STA and the project sponsors shall be allowed to review and comment on the SACOG study and third-party analysis;
- (2) STA and the project sponsors will follow SACOG's recommendation; and,
- (3) If there is a significant deviation from the third-party review the three parties will meet and confer.

3.2. Consistent with the analysis resulting from the process described above, for projects not in the MTP/SCS, once a project sponsor has submitted to STA mitigation measures demonstrating that the project sponsor can mitigate any such project impacts to maintain adherence to the then applicable regional GHG reduction target, the project shall be eligible for Initiative funds. There should be no net increase to regional GHG emissions after mitigation measures are complete. SACOG will consider any mitigated project for inclusion in the next MTP/SCS.

3.3. These implementation procedures shall only apply to projects that are not currently planned or programmed for construction in the MTP/SCS. Projects already included in the MTP/SCS for project development are eligible to receive Initiative funds. These implementation procedures do not apply to projects that are exempt from GHG reduction targets – i.e., projects that do not expand transportation capacity. These implementation procedures only apply to eligibility for funding of construction phases of projects.

4. **Statements Regarding MOU.** All Parties will issue a public statement in support of this MOU and the MOU's intent to implement the provisions of the Initiative.

5. **Transportation Funding Strategy Partnership.** The Initiative includes an Expenditure Plan, which identifies projects and programs that will maintain and improve the quality of life in Sacramento County, and are intended to accomplish several goals. One of these goals is to improve the ability of all local jurisdictions and agencies to leverage regional, state, and federal transportation funding with the goal of providing a competitive local match for the projects and programs listed in the Expenditure Plan. In support of this goal, STA, in partnership with SACOG, will develop and implement a Transportation Funding Strategy to advance projects in the Expenditure Plan that support the goals and objectives of the MTP/SCS and help local agencies identify and attract additional state, federal, and regional funding opportunities.
6. **California Mobility Center.** The Parties acknowledge that the City of Sacramento has stated its intention to commit \$100M in future Initiative funds, pursuant to applicable terms and processes set forth in the Initiative, to support the California Mobility Center.
7. **Miscellaneous.** This MOU shall be effective upon adoption by the Parties and may only be amended in writing by mutual consent of the Parties. This MOU shall have no further force and effect if the voters do not approve the Initiative at the November 2022 general election. To the extent any provision contained herein is deemed to be unlawful or unenforceable, the offending provision shall be severed and the remainder of the MOU shall remain in full force and effect. This MOU is intended to clarify and implement the Initiative; nothing herein is intended to modify the express terms of the Initiative. Nothing herein is intended to authorize or in any way allow the construction of projects in a manner that violates federal, state, or local laws and regulations. This MOU may be executed in duplicate counterparts. The signatories below are authorized by their respective Parties to execute this MOU.

[CONTINUED ON FOLLOWING PAGE]

8. **CBS Confirmation.** CBS acknowledges and agrees that the provisions of this MOU are fully consistent with the language in the Initiative and CBS's intentions as the proponent of the Initiative. CBS also acknowledges its commitment to reference this MOU in its ballot argument in support of the Initiative.

CONFIRMED BY CITIZENS FOR A BETTER SACRAMENTO

By: \_\_\_\_\_

The above signatory is an authorized representative of CBS and has full authority to execute on behalf of CBS.

IN WITNESS WHEREOF, the Parties hereto have caused this MOU to be duly executed as of the date the Parties have executed below.

SACRAMENTO TRANSPORTATION AUTHORITY  By: _____ Kevin Bewsey Executive Director	SACRAMENTO AREA COUNCIL OF GOVERNMENTS  By: _____ James Corless Executive Director
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July 27, 2022

AGENDA ITEM # **8**

**SB 1 LOCAL PARTNERSHIP PROGRAM (COMPETITIVE) PROJECT RANKING PROCESS AND CALL FOR PROJECTS**

Action Requested: Approve

Key Staff: Kevin M. Bewsey, Executive Director

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**Recommendation**

Approve the SB 1 Local Partnership Program (Competitive) Project Ranking Process and Call for Projects

**Background Information**

Senate Bill 1 (SB 1), the Road Maintenance and Repair Act of 2017, establishes the Local Partnership Program (LPP) to reward those counties, cities, districts, and regional transportation agencies in which voters have approved fees or taxes dedicated solely to transportation improvements. Statewide, \$200 million in SB 1 revenue is made available annually to these entities in two components: formulaic and competitive.

In August, the California Transportation Commission (CTC) plans to adopt the final LPP-C guidelines and issue a call for projects. This third cycle of SB 1 LPP (Competitive) funding is for FY's 23-24 and 24-25 with applications due November 29<sup>th</sup>, 2022

For cycle 3, just over \$144 million is available statewide for the competitive program. Projects funded from the SB1 LPP (Competitive) program require a one-to-one match and the program will only fund construction of a capital project. The maximum request is \$25 million per project. The Authority is considered the applicant for the program with local jurisdictions functioning as the implementing agencies. An applicant submitting multiple project nominations must prioritize its projects prior to submitting those nominations. A local jurisdiction that has an imposed fees may also apply directly instead of through the Authority.

The CTC draft guidelines have evaluation criteria that give priority to:

- Projects that improve accessibility and connectivity. \*
- Projects that reduce greenhouse gas emissions and advance the State's air quality and climate goals
- Projects that can demonstrate community engagement. \*
- Projects that are cost-effective.
- Projects that can commence construction or implementation earlier.
- Projects that leverage funds above the required matching amount.
- Projects that address safety and system preservation needs.
- Projects that further regional and local transportation, land use, and housing goals.



- Projects that minimize vehicle miles traveled while maximizing throughput.
- \* Certain evaluation criteria listed above have an emphasis on disadvantaged or historically impacted and marginalized communities.

Historically, implementing agencies who wish to have projects nominated provide a informational form and a short presentation to the Authority summarizing the project and how it aligns with the evaluation criteria. At a subsequent Authority meeting, the Authority prioritized the projects for submittal to the CTC.

### **Discussion**

Project applications and priorities are due to the CTC no later than November 29<sup>th</sup>, 2022. All projects will compete against other projects throughout the state including those nominated by local agencies with an imposed fee. The CTC has indicated it will consider geographic balance, but over multiple programming cycles. The CTC may also elect to only evaluate the highest priority application(s) submitted by each agency.

STA staff is recommending the following project prioritization process and schedule:

- Implementing agencies submit a nomination packet demonstrating how their project meets the evaluation criteria as shown in Attachment 1. In addition, we ask that the nomination packet address how the project provides regional benefit to those users that live, work, or play within the County and/or Cities.
- Each implementing agency will be allowed 10 minutes to provide a project presentation.
- During a subsequent Authority meeting, an informal poll will be conducted to identify each Director's priority. Staff will gather this information to reflect the unofficial results which will be used to guide discussion. The Board will then prioritize the project nominations.

### Schedule

- |                                     |  |
|-------------------------------------|--|
| • July 29 <sup>th</sup> , 2022      | STA call for nominations                   |
| • September 2 <sup>nd</sup> , 2022  | Nominations due to STA                     |
| • September 6 <sup>th</sup> , 2022  | Presentations due to STA                   |
| • September 15 <sup>th</sup> , 2022 | Presentations to STA Board                 |
| • October 13 <sup>th</sup> , 2022   | STA Board prioritization                   |
| • November 29 <sup>th</sup> , 2022  | STA submits applications and priorities    |
| • June 28-29, 2023                  | CTC SB1 LPP (Competitive) program adoption |

### Attachment(s)

1. Project Nomination Form



**SACRAMENTO TRANSPORTATION AUTHORITY  
SB 1 CYCLE 3 LOCAL PARTNERSHIP PROGRAM COMPETITIVE  
PROJECT NOMINATION FORM**

**I. General Information**

<b>1. Project Name</b>	
<b>2. Implementing Agency</b>	<b>3. Co-Implementing Agencies</b>
<b>4. Location Description and Project Description</b>	
<b>5. Total Project Cost (\$x1000)</b>	<b>6. Local Partnership Program Request (\$x1000)</b>
<b>7. Construction Start date (mm/yy)</b>	
<b>8. Identify the <u>primary</u> mode(s)</b> <i>Select up to two.</i> Bike/Pedestrian <input type="checkbox"/> Complete Streets ITS <input type="checkbox"/> Highway Managed Lanes <input type="checkbox"/> Transit Rail (Passenger) Other (please describe):	<b>9. Identify any <u>secondary</u> mode(s)</b> <i>Select all that apply.</i> Bike/Pedestrian <input type="checkbox"/> Complete Streets ITS <input type="checkbox"/> Highway Managed Lanes <input type="checkbox"/> Transit Rail (Passenger) Other (please describe):
<b>10. Implementing Agency Contact Name (First, Last)</b>	

**II. Project Consistency with Local Partnership Program Evaluation Criteria**

<b>11. Accessibility: How does the project improve accessibility and connectivity?</b>
<b>12. Air Quality &amp; Greenhouse Gases: How does the project reduce greenhouse gas emissions and advance the State's air quality and climate goals?</b>
<b>13. Community Engagement: Does the project demonstrate community engagement?</b>



**SACRAMENTO TRANSPORTATION AUTHORITY  
SB 1 CYCLE 3 LOCAL PARTNERSHIP PROGRAM COMPETITIVE  
PROJECT NOMINATION FORM**

<p>14. Cost Effectiveness: How does the project demonstrate it is cost-effective?</p>
<p>15. Deliverability: Can the project commence construction or implementation early.</p>
<p>16. Leverage Funds: Does the project leverage funds above the required matching amount?</p>
<p>17. Safety and System Preservation: How does the project address safety and system preservation needs?</p>
<p>18. Transportation, Land Use, and Housing Goals (Regional): How does the project advance transportation, land use, and housing goals as identified in the Regional Transportation Plan, Sustainable Communities Strategy, and Regional Housing Needs Allocation?</p>
<p>19. Transportation, Land Use, and Housing Goals (Local): How does the project advance transportation, land use, and housing goals? This could include demonstrating the local jurisdiction has submitted its Housing Element annual progress report to the State or applied to the Department of Housing and Community Development's Prohousing Designation Program and meets Prohousing criteria that support efficient land use.</p>
<p>20. Vehicle-Miles Traveled: How does the project minimize vehicle miles traveled while maximizing throughput.</p>
<p>21. Regional: How does the project provide regional benefits to those users that live, work, or play within the County and/or Cities?</p>