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Item 13 Public comment Caltrain member agency contributions

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To: "Mandelman, Rafael (BOS)" <rafael.mandelman@sfgov.org>

Cc: Supervisor Aaron Peskin <aaron.peskin@sfgov.org>, SFCTA Board Secretary <clerk@sfcta.org>, Caltrain Board <board@caltrain.com>, SFCTA CAC <cac@sfcta.org>, Caltrain CAC Secretary <cacsecretary@caltrain.com>, Caltrain BAC <bac@caltrain.com>

Dear Chair Mandelman and Commissioners,

The intent of this email is to introduce a potential solution to the member agency financial contribution stalemate and the resulting impact on Caltrain's operating budget.

Revenue Assumptions

| Revenue Item | FY2024 Assumptions | FY2025 Assumptions |
|--------------------|---|---|
| Member Agencies | No member agency obligation | No member agency obligation |
| Measure RR | Full allocation to Operations Per sales tax forecast | Full allocation to Operations Per sales tax forecast |
| LCFS | N/A | LCFS credits valued at \$5.0M |
| LCTOP / SRA | One-time allocation to Operations LCTOP: \$2.4M SRA: \$4.8M | One-time allocation to Operations LCTOP: \$1.0M SRA: \$7.4M |
| Measure RR Reserve | Use of \$60.0M to balance the budget (FY2024: \$0) | Use of \$60.0M to balance the budget (FY2025: \$38.1M) |



Background

1) Section 7 on page 9 of the 1996 Joint Powers Agreement mandates the following Financial Commitments for Caltrain Operations:

*“Each Member Agency agrees to share in the operating costs associated with the PCS. Member Agency subsidies for the Main Line Service shall be based on the existing passenger boarding formula which is predicated upon county of origin a.m. peak hour hoardings of passengers as adjusted annually prior to the JPB's adoption of the operating budget. **SCVTA shall be responsible for all net operating costs of the Gilroy Service based upon the fully allocated cost methodology.**”*

[Restated Joint Powers Agreement Peninsula Corridor Project \(Oct. 1996\) \(PDF 649 KB\)](#)

2) The voters of Santa Clara County subsequently passed a sales tax measure known as “2000 Measure A” (Complete Text of Measure A attached for your convenience) which reads as follows:

Increase Caltrain Service, specifically

“Purchase new locomotive train sets for increased Caltrain service in Santa Clara County from Gilroy to Palo Alto and provide additional facilities to support the increased service.”

Conclusions

1) **SCVTA's financial responsibility for the Gilroy service is clearly established in the October 1996 restated JPA**

2) Funding for the Gilroy service is available in a ½ cent sales tax Measure passed in 2000 by the voters of Santa Clara County

Recommendation

1) Make SCVTA accountable for a ***“all net operating costs of the Gilroy Service based upon the fully allocated cost methodology.”***

2) San Francisco and San Mateo counties will each agree to match SCVTA's contribution to the Gilroy service (approximately \$5M/year).

Respectfully presented for your consideration.

Roland Lebrun

CC

Caltrain Board

SFCTA CAC

Caltrain CAC

Caltrain BPAC



2000 Measure A Complete text.pdf

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COMPLETE TEXT OF 2000 MEASURE A

Shall the Board of Directors of Santa Clara Valley Transportation Authority (VTA) be authorized to enact a retail transactions and use tax ordinance imposing (a) a tax for the privilege of selling tangible personal property at retail upon every retailer in Santa Clara County, the territory of VTA; such tax to be at the rate of one-half of one percent of the gross receipts of the retailer from the sale of all tangible personal property sold by him at retail in the territory of VTA, and (b) a complimentary tax upon the storage, use, or other consumption in Santa Clara County, the territory of VTA; such tax to be at the rate of one-half of one percent of the sales price of the property whose storage, use, or other consumption is subject to the tax, such taxes to be imposed for a period not to exceed 30 years, and to take effect only upon the expiration of the current County of Santa Clara 1996 Measure B ½ cent sales tax in April, 2006, and to be used only to:

- **Extend BART from Fremont through Milpitas to Downtown San Jose and the Santa Clara Caltrain Station, specifically,**

To build a BART Extension from Fremont to Milpitas, San Jose and Santa Clara with a major connection to the Tasman Light Rail line at the Milpitas BART Station. In San Jose to include a BART subway section with stations at San Jose State University, the new San Jose City Hall, Downtown San Jose at Market Street, San Jose Arena and the Diridon Multimodal Station connecting to Caltrain, ACE, Amtrak, the Vasona Light Rail line and the VTA bus service. In Santa Clara, to serve Santa Clara University, and the Caltrain Station with a people mover connection to San Jose International Airport.

- **Provide Connections from San Jose International Airport to BART, Caltrain and the VTA Light Rail, specifically,**

To build a people mover rail line connecting the airport passenger terminals directly with BART, Caltrain and the VTA Light Rail line.

- **Extend Light Rail from Downtown San Jose to the East Valley by**

Building a Downtown/East Valley Light Rail line from Downtown San Jose serving the new San Jose City Hall and San Jose University, out Santa Clara Street to Capitol Avenue to join the Capitol Light Rail line then south to Eastridge Shopping Center.

- **Purchase Low Floor Light Rail Vehicles, specifically**

To better serve disabled, seniors and others; purchase an additional 20 low floor light rail vehicles to join the 30 low floor vehicles now being constructed for the new Tasman, Capitol and Vasona Light Rail lines and 50 new low floor vehicles to replace VTA's existing 50 light rail vehicles.

- **Improve Caltrain: Double Track to Gilroy and Electrify from Palo Alto to Gilroy**

Extend the Caltrain double track from the San Jose Tamien Station through Morgan Hill to Gilroy. Provide VTA's funds for the partnership with San Francisco and San Mateo counties to electrify Caltrain from San Francisco to Gilroy.

- **Increase Caltrain Service, specifically**
Purchase new locomotive train sets for increased Caltrain service in Santa Clara County from Gilroy to Palo Alto and provide additional facilities to support the increased service.
- **Construct a New Palo Alto Intermodal Transit Center**
In partnership with the City of Palo Alto and Stanford University, design and construct a new parkway and underpass for University Avenue from the campus to downtown Palo Alto to improve bicycle, pedestrian and transit access to the campus, Palo Alto Caltrain station and downtown Palo Alto. Upgrade passenger facilities at the historic Palo Alto Caltrain Station; upgrade transit facilities for VTA, SAMTRANS, Dumbarton Express and the Stanford Marguerita and Palo Alto shuttle services.
- **Improve Bus Service in Major Bus Corridors**
For VTA Line 22 (Palo Alto to Eastridge Center) and the Stevens Creek Boulevard Corridor, purchase new low floor articulated buses. Improve bus stops and major passenger transfer points and provide bus queue jumping lanes at intersections to permit buses quick access along the corridors.
- **Upgrade Altamont Commuter Express (ACE)**
Provide VTA's matching funds for additional train sets, passenger facilities and service upgrades for the ACE Commuter Service from San Joaquin and Alameda Counties.
- **Improve Highway 17 Express Bus Service**
Provide VTA's share of funds for the partnership with the Santa Cruz County Transit District for additional buses and service upgrades for the Highway 17 Express Bus Service.
- **Connect Caltrain with Dumbarton Rail Corridor**
Provide VTA's share of matching funds for a partnership with Alameda and San Mateo counties for the rebuilding of the Dumbarton Rail Corridor to connect to Caltrain and train sets for this new service conditioned on Alameda and San Mateo County's funding.
- **Purchase Zero Emission Buses and Construct Service Facilities**
Provide funds to supplement federal funds to expand and replace existing VTA diesel bus fleet from current size of just over 500 vehicles to 750 vehicles with the new zero emission buses and to provide maintenance facilities for this new, clean vehicle propulsion system. All new buses to be low floor for easier boarding by seniors and the disabled.
- **Develop New Light Rail Corridors**
Provide capital funds for at least two new future light rail corridors to be determined by Major Investment Studies (MIS). Potential corridors include: Sunnyvale/Cupertino; Santa Teresa/Coyote Valley; Downtown/East Valley Connection to Guadalupe Line; Stevens Creek Boulevard; North County/Palo Alto; Winchester/Vasona Junction; and, initial study of BART connection from Santa Clara through Palo Alto to San Mateo County.

- **Fund Operating and Maintenance Cost for Increased Bus, Rail and Paratransit Service**

Provide revenue to ensure funding, to at least 2014, and possibly longer, of the following: the new Tasman East, Capitol and Vasona Light Rail Lines, the commuter rail connection to BART, expanded paratransit services, expanded bus fleet of 750 vehicles, the Downtown/East Valley Light Rail line operations, which can commence in 2008, and the BART extension to San Jose which can commence operations by 2010;

all subject to the following mandatory requirements:

- The Tax Must Expire 30 Years After Implementation

If approved by the voters, this half-cent sales tax must expire 30 years after implementation. The tax will be imposed for the period commencing April 1, 2006, when current tax expires and terminate on March 31, 2036. The length of this tax cannot be extended without a vote - and the approval - of the residents of Santa Clara County.

- An Independent Citizen's Watchdog Committee Must Review All Expenditures.

The Independent Citizen's Watchdog Committee will consist of private citizens, not elected officials, who comprise the VTA's Citizen's Advisory Committee.

Responsibilities of the Citizen's Watchdog Committee are:

- **Public Hearings and Reports:** The Committee will hold public hearings and issue reports on at least an annual basis to inform Santa Clara County residents how the funds are being spent. The hearings will be held in full compliance with the Brown Act, California's open meeting law with information announcing the hearings well-publicized and posted in advance.
- **Annual Independent Audits:** An annual audit conducted by an Independent Auditor will be done each fiscal year to ensure tax dollars are being spent in accordance with the intent of this measure.
- **Published Results of Audits and Annual Reports:** The Committee must publish the results of the Independent Auditor and the Annual Report in local newspapers. In addition, copies of these documents must be made available to the public at large.

such authorization being pursuant to the provisions of Section 100250 et seq. of the Public Utilities Code and Sections 7251 et seq. of the Revenue and Taxation Code.