



SB 1031



SamTrans Board Meeting | Jessica Epstein, Director
Government and Community Affairs | May 1, 2024

Recent SB 1031 Meetings/Hearings

- MTC Legislation Committee – April 12
- Senate Transportation Committee – April 23
- Senate Revenue and Taxation Committee – April 24
- MTC (Full Commission) Meeting – April 24
- MTC Workshop – April 24 & 25

Next steps

- MTC Legislative Committee – May 10
- Senate Appropriations Committee; date TBD

Updates to SB 1031

Topic	Previous Version	Current Version
Consolidation/Coordination	Study and plan to consolidate all 27 agencies. No funding identified.	Definition of consolidation includes coordination. Establishes goals of study and plan. Primary focus still consolidation, no funding identified.
MTC Authority	Enhances MTC's authority over fares, mapping & wayfinding, etc. Can restrict STA and LTF funds.	Maintains enhanced authority, now offers guardrails. Per Senate Transportation Committee can only restrict STA funds.
Expenditures	Minimum \$750 million to transit operations.	Expenditure Plan and return-to-source formulas.
Revenues	Size of measure not specified.	Per Senate Transportation Committee, goal is to raise \$1.5 billion annually; sales tax increase limited to not more than 1/2 cent which raises ~ \$1.0 billion.
Conflict with local tax measures	Allows for ballot measure any year and any number of times.	Per Senate Transportation Committee, MTC's authority to put a ballot measure to voters expires after 2040, taxes may have a duration of up to 30 years.

SB 1031 Funding Framework

- San Mateo County will contribute 11% of overall measure
 - ½ cent sales tax (current SMC range 9.375%-9.875%); parcel tax; payroll tax; regional vehicle surcharge
 - 70% guaranteed minimum Return to Source
- Funding formula for total funds:

Expenditure Category	Percent
Transit Transformation	45%
<i>Transit Formula</i>	<i>40%</i>
<i>Transit Discretionary</i>	<i>60%</i>
Safe Streets	25%
Connectivity	15%
Flexible	15%
Total	100%

Transit Transformation

- SamTrans – \$25M (\$20M formula, \$5M discretionary)
 - Guaranteed sum to operators with >5 million Riders per year and/or 25 million Miles per year
- Caltrain/BART – SMC share calculated by AM boardings (all discretionary)

System	AM Boardings	\$ Total
Caltrain	37%	\$15M
BART	9%	\$24M

- Caltrain will also get county shares from San Francisco and Santa Clara
- BART will also get county shares from Alameda, Contra Costa, SF and SC

Safe Streets

- Funding would likely be administered by San Mateo County Transportation Authority; funds can be sub-apportioned to cities within the County
- Eligible investments include:
 - Pedestrian safety on sidewalks, crosswalks, and midblock segments with an emphasis on improvements near community facilities such as schools, business districts, and shopping areas;
 - Modifications to intersections, including adjustments to signal timing and projects that reduce conflicts between vehicles and other road users;
 - Safety and accessibility at transit stops;
 - Street surface repair and roadway treatments to reduce vehicle speeds;
 - Improvements to drainage and stormwater infrastructure.
- San Mateo County - \$27M

Connectivity

- Multimodal Capital Improvement program administered by MTC with priorities developed in consultation with County and other partners
- Projects required to be in Plan Bay Area 2050+
- MTC may issue bonds to accelerate capital projects
- Eligible investments include:
 - Highway, transit, and rail mobility projects that close gaps and relieve bottlenecks in the existing transportation network in a climate-neutral manner;
 - Resilience improvements that protect transportation infrastructure from climate-fueled natural disasters;
 - Transportation safety improvements, including grade separations.
- San Mateo County - \$16M

Flexible

- 15% of total funds to ensure each county has a minimum Return to Source of 70%
- Funds only going to those counties that are below the minimum
- Any remaining funds are at MTC discretion for regional priority improvements including transit/transformation (i.e. wayfinding, safety and cleanliness) and/or capital improvements
- San Mateo County - \$0M

Application to San Mateo County

- Return to Source – 99%
 - Approx. 59% operations
 - Approx. 41% capital

\$1B Scenario SMC Generation \$110/year

Expenditure Category	Percent
Transit Transformation	45%
<i>Transit Formula</i>	40%
<i>Transit Discretionary</i>	60%
Safe Streets	25%
Connectivity	15%
Flexible	15%
Total	100%

Expenditure Category	Percent
Transit Transformation	
<i>Transit Formula</i>	\$20M
<i>Transit Discretionary</i>	\$44M
Safe Streets	\$27M
Connectivity	\$16M
Flexible	\$0
Total	\$108M

➤ \$64M – 59%

➤ \$43M – 41%

Note: Sums may not total due to rounding

\$1B Revenue Measure

- 99% Return to Source

County	Safe Streets	Connectivity	Transit Formula	Near-Term Transit Flex (Operating Shortfall & Min Guarantee)	TDM		
					Mandate	Flex	Total
Alameda	\$ 55	\$ 33	\$ 40	\$ 115		\$ -	\$ 243
Contra Costa	\$ 28	\$ 17	\$ 20	\$ 56		\$ -	\$ 121
Marin	\$ 8	\$ 5	\$ 6	\$ 23		\$ -	\$ 42
Napa	\$ 6	\$ 3	\$ 4	\$ 1		\$ 2	\$ 16
San Francisco	\$ 25	\$ 15	\$ 18	\$ 275		\$ -	\$ 332
San Mateo	\$ 27	\$ 16	\$ 20	\$ 44		\$ -	\$ 108
Santa Clara	\$ 72	\$ 43	\$ 52	\$ -		\$ 35	\$ 202
Solano	\$ 13	\$ 8	\$ 9	\$ 1		\$ 5	\$ 36
Sonoma	\$ 15	\$ 9	\$ 11	\$ -		\$ 7	\$ 43
Contribution to Shortfall Coverage				\$ (245)	\$ 150	\$ 95	\$ -
Regional Funds for Improvements					\$ -	\$ 6	\$ 6
Grand Total (With TDM)	\$ 250	\$ 150	\$ 180	\$ 270	\$ 150	\$ 150	\$ 1,150



Thank You



Please email epsteinj@samtrans.com with any questions.