



Countywide Transportation Plan Update and Transportation Expenditure Plan Development Steering Committee Meeting Agenda

Thursday, September 22, 2011, 12 to 3 p.m.
1333 Broadway, Suite 300, Oakland, CA 94612

Mayor Mark Green, Chair
Councilmember Kriss Worthington, Vice Chair
(see back for members)

Meeting Outcomes:

- Receive an update on the Countywide Transportation Plan and Transportation Expenditure Plan (CWTP-TEP) activities since the last meeting
- Discuss and provide input on the administrative draft CWTP
- Discuss the TEP Parameters
- Receive Presentation on Student Transit Pass Research
- Discuss and provide input on the outreach process and polling questions
- Receive an update on the Sustainable Communities Strategy (SCS)/Regional Transportation Plan (RTP) process

12:00 p.m.	1. Welcome and Call to Order	
12:00 – 12:05	2. Public Comment	
12:05 – 12:10	3. Approval of July 28, 2011 Minutes <i>03 Steering Committee Meeting Minutes 072811.pdf – Page 1</i>	A
12:10 – 12:15	4. Update on CWTP-TEP Activities Since Last Meeting	I
12:15 – 1:00	5. Presentation and Discussion on the Administrative Draft CWTP-TEP <i>05 Presentation Draft CWTP.pdf – Page 11</i> <i>05A Draft CWTP.pdf – Document attached separately</i> <i>05B Summary of Financial Recommendation.pdf – Page 21</i> <i>05C Comments and Responses on CWTP Evaluation Results.pdf – Posted in September</i>	I
1:00 – 1:45	6. Presentation and Discussion on the TEP Parameters <i>06 Proposed TEP Parameters.pdf – Page 23</i> <i>06A Summary of TEP Proposals from CAWG and TAWG.pdf – Handout at meeting</i>	I

1:45 – 2:20	7. Presentation of Student Pass Program Research <i><u>07 Student Transit Pass Research Summary.pdf</u></i> – Page 29	I
2:20 – 2:40	8. Discussion on the Outreach Process and Polling Questions <i><u>08 Presentation Fall 2011 Survey Update.pdf</u></i> – Page 53 <i><u>08A Draft Public Polling Questions.pdf</u></i> – Page 61 <i><u>08B Update on Public Outreach Process.pdf</u></i> – Page 71 <i><u>08B1 Public Outreach Dates.pdf</u></i> – Page 75	A
2:40 – 2:45	9. Update: Steering Committee, CAWG, TAWG, and Other Items/Next Steps <i><u>09 Memo Regional SCS-RTP CWTP-TEP Process.pdf</u></i> – Page 77 <i><u>09A CWTP-TEP Committee Meetings Schedule.pdf</u></i> – Page 91 <i><u>09B CAWG and TAWG July 2011 Minutes.pdf</u></i> – Page 95	I
2:45 – 2:50	10. Member Reports	I
2:50 – 2:55	11. Staff Reports	I
2:55 – 3:00	12. Other Business	I
3:00 p.m.	13. Adjournment/Next Meeting: Joint Steering Committee/CAWG October 7, 2011, 12 to 2 p.m. at Alameda CTC	I

Key: A – Action Item; I – Information/Discussion Item; full packet available at www.alamedactc.org

Steering Committee Members:

Mark Green, Chair

Mayor, City of Union City

Kriss Worthington, Vice Chair

Councilmember, City of Berkeley

Ruth Atkin, Councilmember

City of Emeryville

Tom Blalock, Director

BART

Suzanne Chan, Vice Mayor

City of Fremont

Scott Haggerty, Supervisor

County of Alameda

Greg Harper, Director

AC Transit

Olden Henson, Councilmember

City of Hayward

Jennifer Hosterman, Mayor

City of Pleasanton

Marshall Kamena, Mayor

City of Livermore

Rebecca Kaplan, Councilmember

City of Oakland

Nate Miley, Supervisor

County of Alameda

Larry Reid, Councilmember

City of Oakland

Rob Bonata, Vice-Mayor

Alternate, City of Alameda

Luis Freitas, Vice Mayor

Alternate, City of Newark

Tim Sbranti, Mayor

Alternate, City of Dublin

Joyce Starosciak, Councilmember

Alternate, City of San Leandro

Staff Liaisons:

Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation, (510) 208-7428, tlengyel@alamedactc.org

Beth Walukas, Deputy Director of Planning, (510) 208-7405, bwalukas@alamedactc.org

Location Information: Alameda CTC is located in Downtown Oakland at the intersection of 14th Street and Broadway. The office is just a few steps away from the City Center/12th Street BART station. Bicycle parking is available inside the building, and in electronic lockers at 14th and Broadway near Frank Ogawa Plaza (requires purchase of key card from bikelink.org). There is garage parking for autos and bicycles in the City Center Garage (enter on 14th Street between Broadway and Clay). Visit the Alameda CTC website for more information on how to get to the Alameda CTC: <http://www.alamedactc.com/directions.html>.

Public Comment: Members of the public may address the committee regarding any item, including an item not on the agenda. All items on the agenda are subject to action and/or change by the committee. The chair may change the order of items.

Accommodations/Accessibility: Meetings are wheelchair accessible. Please do not wear scented products so that individuals with environmental sensitivities may attend. Call (510) 893-3347 (Voice) or (510) 834-6754 (TTD) five days in advance to request a sign-language interpreter.

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**Countywide Transportation Plan Update and Transportation Expenditure Plan
Development Steering Committee Meeting Minutes
Thursday, July 28, 2011, 12 p.m., 1333 Broadway, Suite 300, Oakland, CA**

Attendance Key (A = Absent, P = Present)

Members:

<u> P </u> Mayor Mark Green, Chair	<u> P </u> Councilmember Olden Henson
<u> P </u> Councilmember Kriss Worthington, Vice-Chair	<u> A </u> Mayor Jennifer Hosterman
<u> P </u> Councilmember Ruth Atkin	<u> P </u> Mayor Marshall Kamena
<u> P </u> Director Tom Blalock	<u> P </u> Councilmember Rebecca Kaplan
<u> P </u> Vice Mayor Suzanne Chan	<u> P </u> Supervisor Nate Miley
<u> P </u> Supervisor Scott Haggerty	<u> A </u> Councilmember Larry Reid
<u> P </u> Director Greg Harper	<u> P </u> Mayor Tim Sabritini (Alternate)

Staff:

<u> P </u> Arthur L. Dao, Alameda CTC Executive Director	<u> P </u> Vanessa Lee, Clerk of the Commission
<u> P </u> Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation	<u> P </u> Angie Ayers, Acumen Building Enterprise, Inc.
<u> P </u> Beth Walukas, Deputy Director of Planning	<u> P </u> Geoffrey Gibbs, Legal Counsel
	<u> P </u> Zack Wasserman, Legal Counsel

Guest(s): Please see the attached attendee list.

1. Welcome and Call to order

Vice Chair Kriss Worthington called to order the Countywide Transportation Plan (CWTP) Update and Transportation Expenditure Plan (TEP) Development Steering Committee meeting at 12:05 p.m.

2. Public Comment

The meeting was turned over to the Chair Mark Green at this time. There were no public comments.

3. Approval of May 26, 2011 Minutes

Councilmember Rebecca Kaplan moved to approve the May 26, 2011 minutes as written. Director Tom Blalock seconded the motion. The motion carried unanimously. (12-0)

4. Approval of CAWG Replacement Member Appointment

Supervisor Scott Haggerty moved to approve the appointment of Hale Zukas as a CAWG representative. Director Tom Blalock seconded the motion. The motion carried unanimously (10-0).

5. Update on CWTP-TEP Activities Since Last Meeting

Tess Lengyel gave an update on the Countywide Transportation Plan (CWTP) activities since the last meeting. She informed the committee that Alameda CTC has done a great deal of technical analysis, and the group will hear an overview presentation about this work. Other activities since the last meeting include updating the *Transit Sustainability and Integration* and *Transportation Demand Management and Parking Management* issue papers based on the comments received from the Community Advisory Working Group (CAWG) and TAWG. Staff held a CAWG/TAWG joint meeting on July 21 to review the CWTP evaluation results.

6. Presentation on CWTP-TEP Planning Process

Bonnie Nelson gave a presentation on the planning process for the CWTP, TEP, and the Regional Transportation Plan (RTP). She reiterated that the CWTP and the TEP will be produced together with the help of CAWG and TAWG, and the Metropolitan Transportation Commission (MTC) will produce the RTP. Bonnie stated that in September, the first draft of the CWTP will be ready for the groups to review; discussion of projects and programs for the TEP will continue through the fall, as well as discussion on the upcoming outreach and polling. She stated that the goal is to have a second draft of the CWTP and the first draft of the TEP for the Steering Committee at the Board retreat in December.

Public Comment:

- *Gabrielle Miller with the Community Advisory Working Group (CAWG) and Genesis* stated that Genesis is a regional community organization and is made up of institutional members representing congregations, unions, and organizations from around Alameda County. Genesis is an affiliate of the Gamaliel Foundation and is working with over 100 organizations across the country to improve funding for Transportation service operations and maintenance. Gabrielle stated that Genesis held a public meeting on July 14, 2011, to introduce the topic of the eco-bus pass program. She thanked the elected officials for attending and/or sending a representative to the meeting. Gamaliel affiliates are focusing on getting an eco-bus pass for Alameda County children in grades 6 through 12 to help improve problems with truancy and to assist in children getting to school. Having a student bus pass is not enough if sufficient bus services do not exist. The organizations are looking to bring back bus services and get beyond the cuts that happened in the last two years in Alameda County.
- *Betty Wharton with Genesis* shared a success story in obtaining endorsements for the eco-bus pass from Alameda County and school district superintendents. Betty referenced the letters in the Steering Committee agenda packet from the state legislature and the Superintendent of Schools Shelia Jordan that endorse the eco-bus pass program.
- *Mahasin Abdul-Salaam co-chair of Genesis' Transportation Task Force* stated that she, along with 600 community residents and 100 Bay Area transportation justice organizations, attended the July 14, 2011, meeting to help make AC Transit transit passes free for students. Mahasin commended the members of the Steering Committee for attending and/or sending representatives to show strong support for

this cause. She stated that the presence of the elected officials meant a lot to the residents of Alameda County.

The Steering Committee members support the need for transit operations funding. Generally, the committee wants to look at the eco-bus pass by planning area because needs in North County are different than needs in other areas of Alameda County. The committee discussed:

- How the decisions of the state officials to cut funds to the cities are impacting Alameda County and may have a significant impact on implementing the eco-bus pass program.
- The need for staff to look at similar programs across the country and existing local programs to help determine an approach to implement the eco-bus pass program. This exercise should include looking at the study AC Transit did in 2003 to provide a free student bus pass.
- How Alameda CTC can consider looking at the Clipper card to implement the program; consider students' attendance and grades as an eligibility requirement.

Councilmember Kriss Worthington moved to have Alameda CTC staff bring suggestions on the eco-pass program including ideas on addressing the program by planning and geographic areas to the Steering Committee. Councilmember Olden Henson seconded the motion and the motion passed unanimously (12-0).

7. Presentation on CWTP Technical Analysis and Evaluation Outcomes and Next Steps

Art Dao introduced to the committee the CWTP Technical Analysis and Evaluation Outcomes Report. He stated that the Alameda CTC is working with a new set of rules and a new process because of Senate Bill (SB) 375 and the Association of Bay Area Governments (ABAG) Sustainable Communities Strategy (SCS) that connect land use and transportation for the first time. Art explained that the committee will receive a presentation describing the performance evaluation process Alameda CTC used to analyze the results of projects and programs. The vision, goals, and performance measures adopted by the Steering Committee guided the evaluation process. Art stated that Alameda CTC will review the evaluation process in detail, and he mentioned to the committee that Alameda CTC will do two additional evaluations, one in the fall and one in the spring of 2012.

Steve Decker and Jamey Dempster gave a presentation that described the performance evaluation process Alameda CTC used to analyze the results of projects and programs. Steve reiterated that the vision, goals, and performance measures adopted by Alameda CTC guided the evaluation process. He reviewed each of the steps in the evaluation process and gave an example of project and program outcomes.

The Steering Committee had many questions on the evaluation process/methodology and results in terms of the outcomes. The members did not agree with the results and requested more clarification on the results. The members were concerned with the results the tools generated. The committee agreed that this process is different than prior plans and overall, is a step in the right direction. The members want to include revenue

generation, congestion relief, along with the other factors (included in the evaluation report) in the evaluation process.

Public Comment:

- *Lindsay Imai with Urban Habitat and CAWG* stated that staff heard many questions from the CAWG members regarding the evaluation process and outcomes. She referred the committee to slide 31 on the handout *for project evaluation example for I-880 Northbound high-occupancy vehicle (HOV)/high-occupancy toll (HOT) lane and goal accessible, affordable, and equitable*. The way the project is being measured is by geographic proximity, and the HOT/HOV lanes scored highest on the accessible, affordable, and equitable goal, and she stated that this goal is not a good measure for this project. She recommends that this goal relate proximity to high-frequency transit. Under the project-level evaluation, why was the performance measure of “clean, healthy” dropped when it relates to particulate matter? Lindsay stated that she will submit her feedback in writing by August 5.

Art informed the committee that staff will bring a list of projects and programs to the committee that integrates the comments suggested to add revenue generation, congestion relief, and other factors in the evaluation process.

8. Presentations and Discussion on TEP Financial Projections and Parameters

Bonnie and Nancy Whelan gave a presentation and led the discussion on the TEP financial projections and parameters.

Many of the Steering Committee members agreed that having a measure in perpetuity and adding an additional half cent to make the measure a full one cent is the best approach. Generally, the committee supports the idea of innovation and technology, but were not in concurrence about a new category in addition to the projects and programs categories. Discussion took place on the future impact of the measure if it is in perpetuity and the project/program split is the same as it is currently. It was noted that a 60/40 split will provide significant increases in funding in real dollars and that the Commission could consider adjusting some of the percentages and still result in a major increase in overall funding amounts, if another half-cent is approved. It was also discussed that the Alameda CTC may go to the voters every 20 years to receive voter approval on a new expenditure plan; therefore, funding projects and programs would need to be contained within 20-year increments to not impact future funding opportunities and decision-making.

Public Comment:

- *Jane Krammer with Stand* stated that the section for innovation matters because the public has a lot of capability to be innovative. Alameda CTC staff and the Steering Committee need to find ways to engage the public to contribute in a conversation on emerging technology. Input from the public is needed for ideas on innovation.

Due to time constraints, Tess noted that a presentation on sales tax measures around the state is included in the packet. The presentation provided a historical overview on the

different measures in the state and how Alameda CTC is preparing for its third sales tax measure in Alameda County. The items covered in the presentation include:

- California Self-help Counties
- The evolution of transportation sales tax measures
- Funding volatility
- Transportation sales tax measures in the last decade
- Measures around the state that passed in the 21st Century
- Cumulative statewide investments
- The Alameda County sales tax evolution

9. Discussion of the Fall 2011 Outreach Approach and Title VI

Tess requested that the Steering Committee approve the fall outreach approach, which will repeat the outreach strategy used in the first round of outreach with more focused outreach efforts on reaching Asian and Hispanic populations.

Mayor Mark Green moved to approve the fall outreach approach. Mayor Marshall Kamena seconded the motion. The motion passed unanimously (12-0).

10. Update: Steering Committee, CAWG, TAWG, and Other Items/Next Steps

Tess requested that the Steering Committee approve adding a meeting in October.

Mayor Mark Green moved to approve adding a meeting in October. Mayor Marshall Kamena seconded the motion. The motion passed unanimously (12-0).

Supervisor Scott Haggerty requested that Alameda CTC staff respond to the letter from the Alameda County Office of Education (ACOE) and request that the ACOE contribute money toward the eco-bus pass program. The members agreed by consensus.

11. Member Reports

None

12. Staff Reports

None

13. Other Business

None

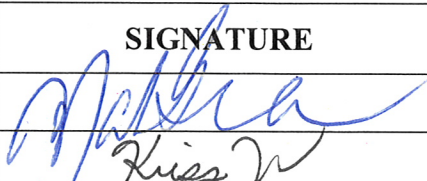
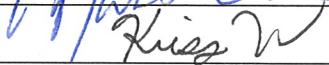
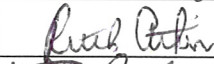


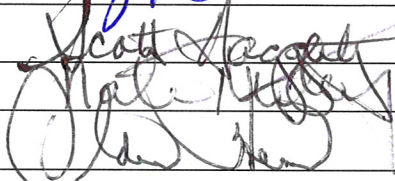
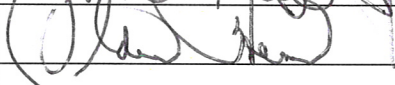
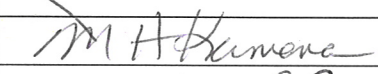
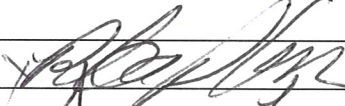
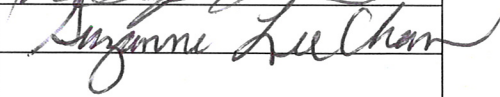

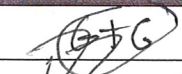
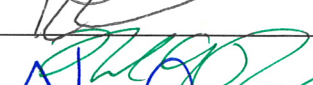
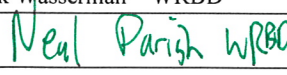
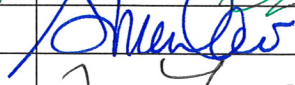
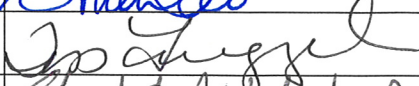
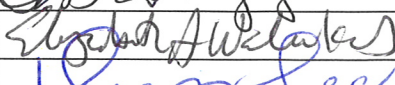
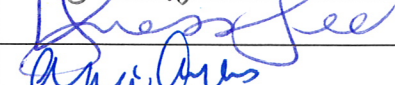
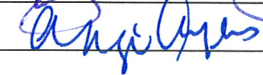
14. Adjournment/Next Meeting





The meeting adjourned at 3 p.m. The next meeting is on September 22, 2011.

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ALAMEDA CTC CWTP-TEP Meeting
July 28, 2011
1333 Broadway, Suite 300, Oakland, CA 94612

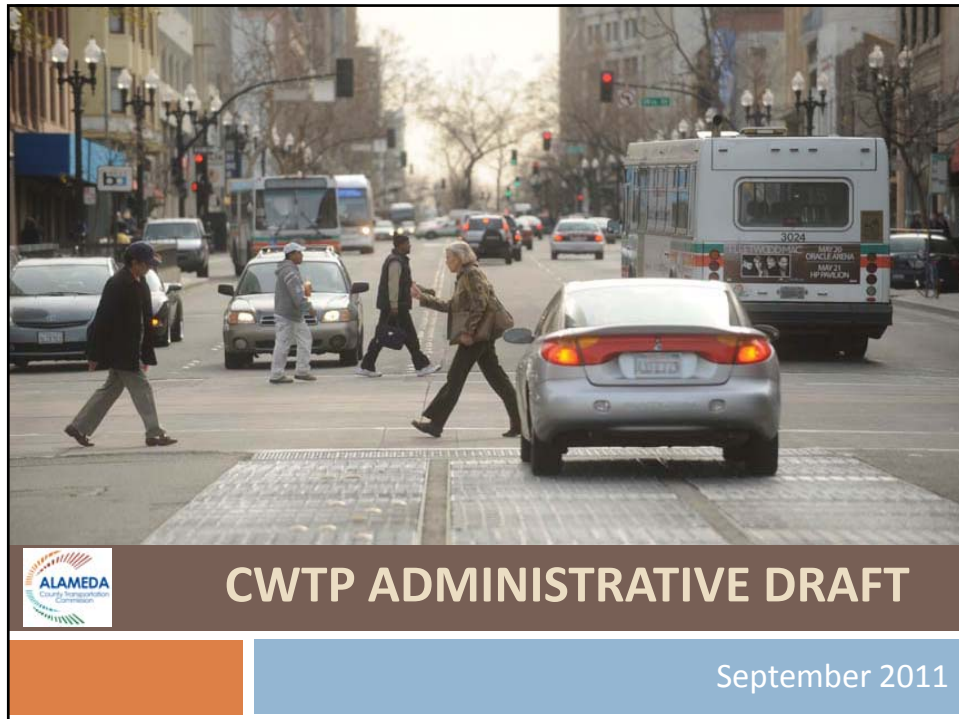
JURISDICTION/AGENCY	MEMBERS	SIGNATURE
City of Union City	Mark Green, Chair	
City of Berkeley	Kriss Worthington	
City of Emeryville	Ruth Atkin	
BART	Thomas Blalock	
AC Transit	Greg Harper	
Alameda County	Scott Haggerty	
	Nate Miley	
City of Hayward	Olden Henson	
City of Pleasanton	Jennifer Hosterman	
City of Livermore	Marshall Kamena	
City of Oakland	Larry Reid	
	Rebecca Kaplan	
City of Fremont	Suzanne Chan	
	ALTERNATES	
City of Alameda	Beverly Johnson	
City of Dublin	Tim Sbranti	
City of Newark	Luis Freitas	
City of Albany	Farid Javandel	
City of San Leandro	Joyce Starosciak	
Legal Counsel	Geoffrey Gibbs - GLG	
	Zack Wasserman - WRBD	
Alameda CTC Staff		
Executive Director	Arthur L. Dao	
Deputy Director of Policy, Public Affairs and Legislation	Tess Lengyel	
Deputy Director of Planning	Beth Walukas	
Clerk of the Commission	Vanessa Lee	
Program Management Team Staff	Angie Ayers	

STAFF	Initials	STAFF	Initials
Patricia Reavey – Director of Finance		Gladys V. Parmelee – Office Supervisor	gvp
Saravana Suthanthira - Senior Transportation Planner		Ray Akkawi – Manager of Project Delivery	
Diane Stark - Senior Transportation Planner		Steve Haas – Senior Transportation Engineer	
Laurel Poeton – Assistant Transportation Planner		John Hemiup – Senior Transportation Engineer	
Yvonne Chan – Accounting Manager		Arun Goel – Project Controls Engineer	
Sammy Ng – Senior Accountant		Matt Todd - Manager of Programming	MT
Lei Lam – Senior Accountant		Vivek Bhat - Senior Transportation Engineer	
Patty Seu - Accountant		Jacki Taylor – Programming Analyst	
Seung Cho – Contract Procurement Analyst			
Liz Brazil – Contract Compliance & Outreach Analyst			
Linda Adams – Executive Assistant		Frank R. Furger – Executive Director, I-680 JPA	
Victoria Winn – Administrative Assistant		James O'Brien	
Claudia Leyva - Administrative Assistant		Stefan Garcia	

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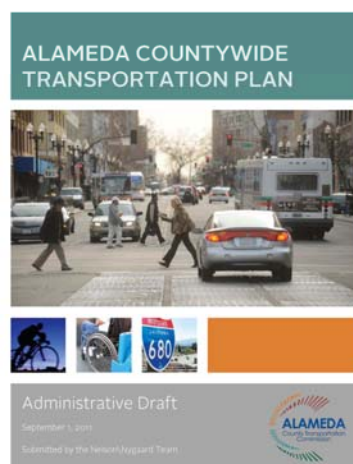
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Countywide Transportation Plan

- First “Administrative” Draft of the CWTP
- 7 Chapters
- New Format
- Draws on past work:
 - ▣ Briefing Book
 - ▣ Issue Papers
 - ▣ Performance Evaluation
 - ▣ Stakeholder Outreach



Structure of CWTP

- Chap. 1: Introduction
- Chap. 2: Vision and Goals, Performance Measures
- Chap. 3: Existing and Future Conditions
- Chap. 4: Coordination with Land Use
- Chap. 5: Funding and Finance
- Chap. 6: Projects and Programs
- Chap. 7: Next Steps



ALAMEDA CTC

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CWTP/TEP Reports, Documents and Presentations

Reports

Since the CWTP/TEP planning process began in the fall of 2010, Alameda CTC and the planning consultant team have completed a number of substantive reports to set the context for the CWTP/TEP and inform the overall planning process. These reports are the building blocks for the final plan and are provided here for your reading and review:

- [Final Vision and Goals \(January 2011\)](#)
- Existing Conditions Report: the "Briefing Book" (March 2011)
 - [Full Briefing Book](#)
 - [Cover and Table of Contents](#)
 - [Chapter 1 - Introduction](#)
 - [Chapter 2 - Population, Demographics and Travel Demand](#)
 - [Chapter 3 - Land Use and Greenhouse Gas Emissions](#)
 - [Chapter 4 - Highways, Roadways and TSM](#)
 - [Chapter 5 - Transit](#)
 - [Chapter 6 - Communities of Concern](#)
 - [Chapter 7 - Biking in Alameda County](#)
 - [Chapter 8 - Pedestrian Travel](#)
 - [Chapter 9 - Goods Movement](#)
 - [Chapter 10 - Parking and Transportation Demand Management](#)
 - [Chapter 11 - Funding and Financial Outlook](#)
 - [Appendix A](#)
- [Performance Measures \(March 2011\)](#)
- Issue Papers (April 2011)
 - [Sustainability Principles](#)
 - [Innovative Funding Strategies](#)
 - [Transit Sustainability and Integration \(rev. June 2011\)](#)
 - [Transportation Demand Management \(TDM\) and Parking Management \(rev. June 2011\)](#)
 - [Goods Movement-Related Issues and Best Practices](#)
 - [Integration of Land Use and Transportation](#)
- [Initial Complete List of Projects/Programs Submitted to MTC \(May 2011\)](#)
- [Spring Outreach Report \(May 2011\)](#)
- [CWTP Evaluation Outcomes Report \(July 28, 2011\)](#)

Related Content

- [About the Countywide Transportation Plan and TEP](#)
- [CWTP Comment Archive](#)
- [CWTP/TEP Public Outreach Archive](#)
- [Comment on the CWTP](#)
- [Plan Development Committees](#)
- [Public Participation and Opportunities for Involvement](#)

SEARCH →

http://www.alamedactc.org/app_pages/view/3070

Developing a Financially Constrained CWTP

- Total estimate of funding available to Alameda County as assigned by MTC: \$6.8 billion
- Call for projects resulted in \$13 billion
 - ▣ Capital project submissions: \$3.2 billion
 - ▣ Program requests: \$9.8 billion
- Fund requests were almost 100% over available funding amounts



Financial Constraints in a New Context

- CWTP to address a new set of goals, different from previous CWTPs
- Consistent with SB 375 and supportive of the Sustainable Communities Strategy
- Consistent with other legislative mandated and adopted goals
 - ▣ Maintenance of transit and roads
 - ▣ Congestion relief to improve air quality
- Results will include broader list of projects and programs to support:
 - ▣ SB 375 and commitments to on-going investments and goals



Considerations in Developing Financially Constrained List

- **Committed Projects:** As defined by MTC are fully funded or under construction and considered as part of baseline transportation network (Figure 6-2)
- **Performance Evaluation:** used to identify relative performance of projects and programs in scenario packages against sustainability goals in adopted CWTP - a starting point
- **Projects Grouped:** Based on performance evaluation and on-going commitments
 - Group A – Measure B
 - Group B – High performing, low cost (under \$5 M) – “low hanging fruit”
 - Group C – Projects from policy and technical consensus processes (Reso. 3434, LATIP, etc.)
 - Group D – Other high performing projects, some high costs
 - Group E – All other projects, generally medium to low scoring



Considerations *continued*

- **Projects identified in Tiers (Figures 6-3 through 6-6):**
 - Tier 1 – fully funded
 - Tier 2 – partially funded and have commitment to project phase implementation or project development
 - Vision – no discretionary funding proposed in this CWTP, but eligible for funding as it becomes available
- **Projects Moved into Vision Tier:**
 - Projects were moved into Vision funding from Group E if they were low performing and had less than 50% of outside funding identified
- **Program Performance:** Programs were allocated funding based upon CWTP goals, prior commitment, and the importance of new investment strategies to meet SB 375 goals
- **Equity**



Baseline Funding Request: \$13 B

**Table 1: Baseline Funding Request
Capital Projects and Programs**

	Capital Projects	Overall Program Requests	Total Amount by Planning area
North County	\$554		\$554
Central County	\$279		\$279
South County	\$1,112		\$1,112
East County	\$1,267		\$1,267
		\$ 9,868	
Totals	\$3,212	\$9,868	\$13,080

□ **MTC Assigned Funding: \$6.8 billion**



Overall Funding Recommendation

**Table 2: Proposed Financially Constrained First Draft Countywide Transportation Plan
Capital Projects and Programmatic
Capital Projects: 40%**

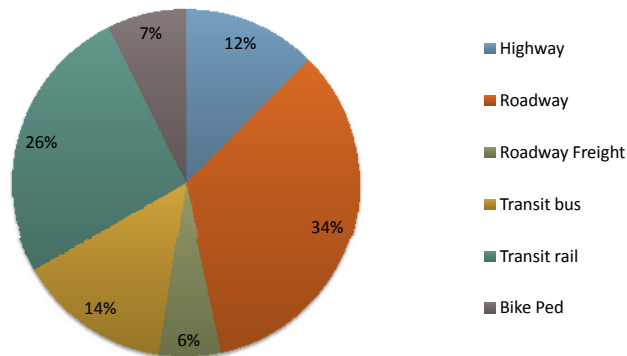
	Capital Projects	Programmatic Capital Projects	Total Amount by Planning area	Percent of Total by Planning Area	County Pop. Share
North County \$	390	\$ 750	\$ 1,140	42%	46%
Central County \$	150	\$ 200	\$ 350	13%	21%
South County \$	818	\$ 10	\$ 828	30%	18%
East County \$	395	\$ 10	\$ 405	15%	15%
Totals \$	1,753	\$ 970	\$ 2,723		

□ **Proposed Project and Programmatic Project
Recommendation is 40% of MTC allocated funds**



Proposed Funding for Capital and Programmatic Capital Projects: 40%

Proposed Funding for Capital and Programmatic Capital Projects

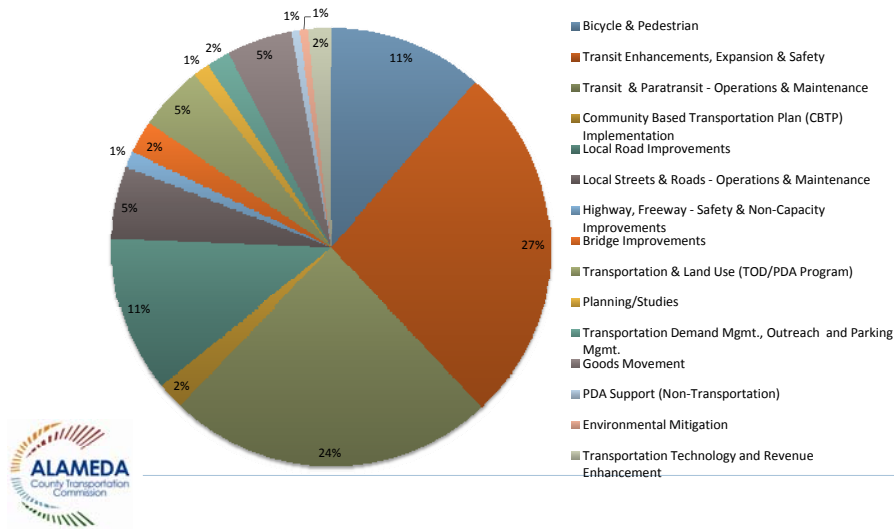


Countywide Programs Recommendation: 60%

- 15 countywide Program Categories (Figure 6-11)
- Program Request: \$9.8 billion
- Program Recommendation: \$4.1 billion
- **Program funding** recommendation represents **60%** of MTC allocated funds



Proposed Program Funding: 60%



What Proposed Funding Does

- Strongly supports transit operations and regional rail plan to move more people not cars
- Establishes guarantees for transit, roadway, community based transportation plans, bike and pedestrian funding
- Supports TOD, PDAs
- Supports roadway and highway investments to address freight movement and congestion relief
- Honors on-going commitments and legislative mandates



Additional Analysis

- Additional analysis will be done in the next evaluation to address how investments support:
 - ▣ Low-income communities
 - ▣ Transit-oriented development
 - ▣ Priority development areas



Schedule

- End of September: **Steering Committee approves Administrative Draft CWTP with List of Projects & Programs/TEP Parameters**
- October: **Second Round of Evaluation and Public Outreach**
 - ▣ Proposed future transportation network
 - ▣ Locally preferred land uses
 - ▣ CWTP-TEP Outreach discussed under item 08
- November/December: **Second Draft of the CWTP/First Draft TEP**
 - ▣ Includes evaluation results, More info from MTC on funding if available
 - ▣ Edits to other sections from CAWG/TAWG/Steering Comm.
 - ▣ Polling and Outreach results
- December/January 2012: **Final Draft CWTP-TEP** released for Review
- May 2012: Commission approval of **Final CWTP and TEP**
 - ▣ Finalized Land Use Scenarios from SCS for Chapter 4



Questions?



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Summary of Financial Recommendation: Tables 1, 2, 3

Table 1: Baseline Funding Request
Capital Projects and Programs

	Capital Projects	Overall Program Requests	Total Amount by Planning area	Available MTC Funds
North County	\$ 554		\$ 554	\$ 2,500 new discretionary
Central County**	\$ 279		\$ 279	\$ 4,365 estimated measure
South County	\$ 1,112		\$ 1,112	\$ 6,865 Total estimated
East County	\$ 1,267		\$ 1,267	
		\$ 9,868		
Totals	\$ 3,212	\$ 9,868	\$ 13,080	

191% Total Projects and Programs Requests as percent of MTC Total
47% Total Project Request as percent of MTC Total
144% Total Program Request as percent of MTC Total

Table 2: Proposed Financially Constrained First Draft Countywide Transportation Plan
Capital Projects and Programmatic Capital Projects: 40%

	Capital Projects	Programmatic Capital Projects	Total Amount by Planning area	Percent of Total by Planning Area	County Population Share	Capital Projects Only by Planning Area - % of Total	Programmatic Capital Projects Only by Planning Area - % of Total	Available MTC Funds
North County*	\$ 390	\$ 750	\$ 1,140	42%	46%	14.3%	27.5%	\$ 2,500 new discretionary
Central County**	\$ 150	\$ 200	\$ 350	13%	21%	5.5%	7.3%	\$ 4,365 estimated measure
South County	\$ 818	\$ 10	\$ 828	30%	18%	30.0%	0.4%	\$ 6,865 Total estimated
East County	\$ 395	\$ 10	\$ 405	15%	15%	14.5%	0.4%	
Totals	\$ 1,753	\$ 970	\$ 2,723					

*North County includes \$50 Million in Community Based Transportation Plan capital investments

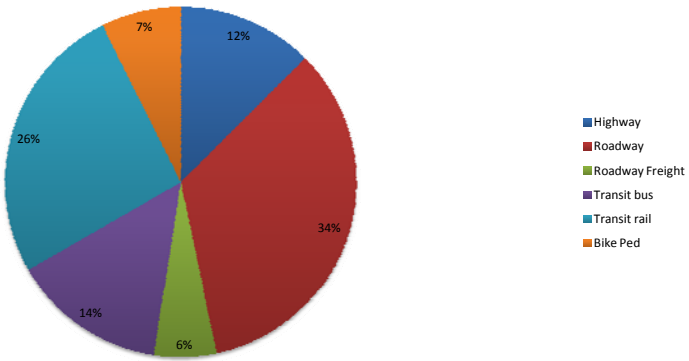
**Central County includes \$50 Million in Community Based Transportation Plan capital investments

40% Total Projects amount as percent of MTC Total
60% Total Program Amount as percent of MTC Total
\$ 4,142 Total Available for Program Allocations

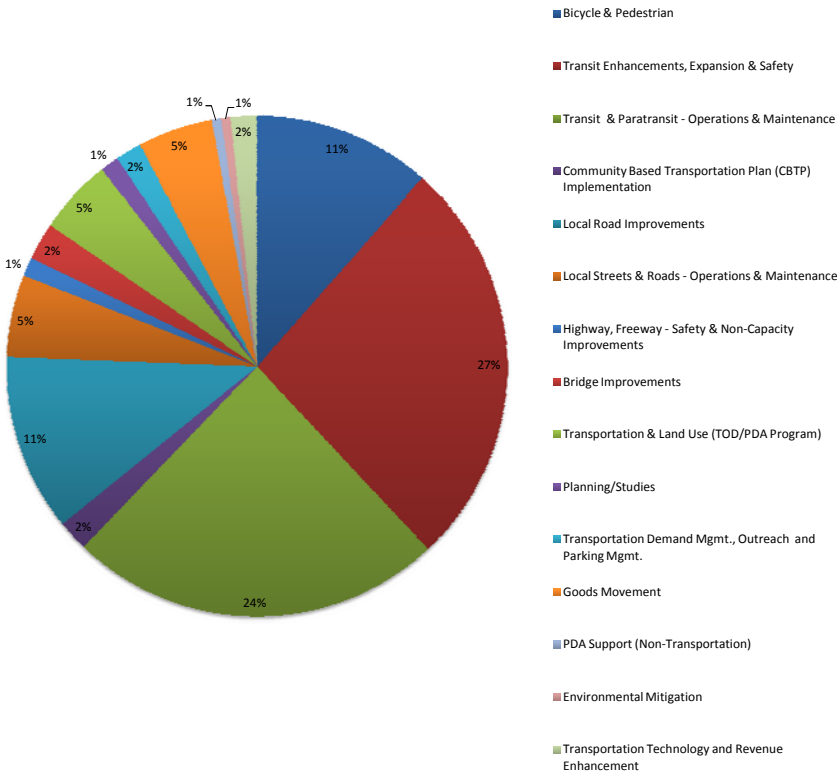
Table 3: Proposed Programs Funding

Program Category: 60%	Total Estimated Request (including Programmatic Capital Projects)	Program as % of Total	Proposed Funding (no programmatic capital projects)	Proposed Funding - Programs as % of Total
			\$ 4,142	
1 Bicycle & Pedestrian Infrastructure, support facilities (including operations), and maintenance	\$ 2,344	23.8%	\$ 475	11%
2 Transit Enhancements, Expansion & Safety Capital rehab., capacity expansion, safety, stations, communications, environmental	\$ 1,892	19.2%	\$ 1,100	27%
3 Transit & Paratransit - Operations & Maintenance Operations restoration, service expansion, maintenance, transit priority measures (TPM), fare incentives	\$ 1,745	17.7%	\$ 1,000	24%
4 Community Based Transportation Plan (CBTP) Implementation Improvements for transit, bike/pedestrian, safety, support services- focus on communities of concern	\$ 236	2.4%	\$ 82	2%
5 Local Road Improvements Major Arterial Performance Initiative Program, safety, grade separations, signals, complete streets, signage, coordination with freeways	\$ 1,054	10.7%	\$ 475	11%
6 Local Streets & Roads - Operations & Maintenance Pavement and other maintenance, signal operations, ITS	\$ 972	9.9%	\$ 220	5%
7 Highway, Freeway - Safety & Non-Capacity Improvements Interchange improvements, freeway operations and maintenance, ramp metering, soundwalls	\$ 27	0.3%	\$ 50	1%
8 Bridge Improvements Operations, replacement, repair, maintenance and expansion	\$ 286	2.9%	\$ 100	2%
9 Transportation & Land Use (TOD/PDA Program) Supports Transit Oriented Development (TOD) and Priority Development Areas (PDA) through multimodal improvements and CEQA mitigation	\$ 831	8.4%	\$ 200	5%
10 Planning/Studies Planning studies and implementation	\$ 60	0.6%	\$ 50	1%
11 Transportation Demand Mgmt., Outreach and Parking Mgmt. Range of programs includes Guaranteed Ride Home, Safe Routes to School (SR2S), Safe Routes to Transit (SR2T), travel training, variable parking pricing	\$ 154	1.6%	\$ 70	2%
12 Goods Movement Improvements for goods movement by truck and coordinated with rail (and air) such as truck parking and truck/port/freight operations	\$ 170	1.7%	\$ 200	5%
13 PDA Support (Non-Transportation) Non-transportation infrastructure to support PDAs such as sewer, utilities, etc.	\$ 20	0.2%	\$ 25	1%
14 Environmental Mitigation Environmental Mitigation for major construction projects	\$ -	0.0%	\$ 25	1%
15 Transportation Technology and Revenue Enhancement Advancing technologies for transportation and revenue efficiency such as charging stations, communications, HOT/Express lanes toll collection, etc	\$ 77	0.8%	\$ 70	2%
TOTAL	\$ 9,868	100%	\$ 4,142	100%

Proposed Funding for Capital and Programmatic Capital Projects



Total Proposed Program Allocations by %





MEMORANDUM

To: Alameda CTC
From: Bonnie Nelson
Date: August 5, 2011
Subject: Parameters for Development of the Transportation Expenditure Plan

The attached table summarizes the basic parameters that staff seeks approval on for developing a framework for creating a draft Transportation Expenditure Plan. These parameters provide guidance and may be changed as a result of polling, public input, or the needs of the specific projects and programs selected for the plan. It should be noted that these parameters would pertain only to the new funding generated by augmentation of Measure B, and would not affect the current Measure.

These parameters will be finalized in much more detail through the development of the expenditure plan guidelines, which will describe in detail how funds will be allocated and what expenses will be eligible for funding. More formal guidelines will be developed after a draft project and program list is developed.

The proposed TEP Parameters build on the success of the current measure, retaining the basic allocation of funds, 60% to programs and 40% to capital projects. It is important to recognize that maintenance of the 60/40 split ensures significant increases in real dollars for projects and programs since a new half cent will essentially double the existing available funds. Funds for planning and development would be specifically eligible under both the project and program category to ensure that projects and programs continue to be made ready for future funding cycles. Projects selected for the TEP would be expected to be "construction ready" (including project phases) within 7 years of plan adoption. While a time extension may be possible by a vote of the Alameda CTC Board, projects that do not appear able to meet this criterion would not be selected for funding in this plan cycle. Other factors to be used to select projects for sales tax funding include ability to meet the adopted plan goals, public support and the ability to leverage investments and transportation improvement outcomes across multiple projects. Program funds would be distributed in almost all cases on a combination of pass through or "formula funds" and grant based funds to foster innovation and coordination across jurisdictions.

It should be noted that these parameters focus the planning efforts on a half cent augmentation of the current tax through 2022 which would then become a 1 cent tax in perpetuity. Priorities, in the form of an updated expenditure plan, would go back to the voters in 2042 and every 20 years thereafter.

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TEP Parameters Recommendations, September 2011

	Issue/Parameter	Current Measure B	Recommendation for New TEP ¹
A	Duration of Tax	20 years	A permanent extension with reconsideration of the expenditure plan by voters every in 2042 and every 20 years thereafter (50% vote for expenditure plans)
B	Amount of Tax	½ cent	<ul style="list-style-type: none"> 2012-2022: Augment current tax by ½ cent if polling suggests this could pass Beyond 2022: 1 cent tax Pending results of polling (Oct 2011)
C	Division of funds between Programs and Projects	60% Programs 40% Projects	<ul style="list-style-type: none"> 60% Programs 40% Projects Include project/program development as eligible for funding in both categories.
D	Program Categories	Program categories and shares of programmatic expenditures: <ul style="list-style-type: none"> Local Streets & Roads: 22.34% Mass Transit: 21.92% Specialized Transportation for Seniors & People w/Disabilities: 10.45% Bicycle & Pedestrian Safety: 5.00% Transit Center Development Funds: 0.19% 	Keep current categories and add: <ul style="list-style-type: none"> PDA/TOD/Climate Action (which will replace the current Transit Center program) Parking & Transportation Demand Management (TDM) Technology and Innovation Environmental Mitigation Goods Movement Planning and Project Management Other? Guidelines will determine how funds are allocated in each program.

¹ These parameters will provide guidance for development of the Transportation Expenditure Plan and may be changed based upon poll results, public input, or the need of specific projects and programs selected for the plan.

	Issue/Parameter	Current Measure B	Recommendation for New TEP ¹
E	Performance Measures (to select projects and programs for funding)	<ul style="list-style-type: none"> Plan developed with extensive public involvement in two year process Funding for programs intended to reflect geographic equity based on 2005 population projections Projects have five years from the first year of revenue collection (up to April 1, 2007) to receive environmental approvals and to have a fully funded project. If projects cannot meet requirement, one-year time extensions can be requested. If projects still cannot meet requirement, funds are re-allocated. If project becomes infeasible or unfundable, funds can be re-allocated. Leveraging of outside funding sources is encouraged 	<ul style="list-style-type: none"> Maximum performance according to adopted goals² and implementation policies, such as a complete streets policy (to be brought to the commission in fall 2011) Public Support/Polling: Based on polls conducted March and October 2011 and CWTP/TEP Workshops and Toolkits Projects: <ul style="list-style-type: none"> Able to be constructed within 7 years of passage of expenditure plan (full funding plan and environmental clearance within 7 years of adoption); Funds able to be reallocated if full funding is not identified or project becomes infeasible; Constructability Leverage (both \$\$ and outcomes): Establish maximum contribution from sales tax for construction phases, as a percentage of construction cost; fund feasibility studies, early design, outreach and environmental work at a higher percentage. One year time extensions may be requested if measurable progress has been made towards full funding and development.
F	Flexibility	<ul style="list-style-type: none"> No formal way to build in flexibility, however examples of flexibility in past TEP include: <ul style="list-style-type: none"> Paratransit "gap grant" program to fill mobility gaps. Bike/Ped Program allocates funding through competitive grant process Transit operators have flexibility to determine priorities for funds 	<ul style="list-style-type: none"> New program for technology innovation to allow for new ideas to be funded during the life of the plan. Flexible use of grant funds within program categories. Development of a priority list for receiving funds if a project becomes unfundable or if excess funds are available. Rainy day fund maintained to ensure minimum levels of service in program categories.

² Adopted CWTP/TEP Goals: Multimodal; Accessible, Affordable and Equitable; Integrated with land use patterns and local decision making; Connected across the county, within and across the network of streets, highways, transit, bicycle and pedestrian routes; Reliable and Efficient; Cost Effective; Well Maintained; Safe; and Supportive of a Healthy and Clean Environment

	Issue/Parameter	Current Measure B	Recommendation for New TEP ¹
G	Distribution of program funds (formula-based "pass-through" or grants)	<ul style="list-style-type: none"> Programmatic funds disbursed monthly on a set formula to each program category, distribution within each program varies: <ul style="list-style-type: none"> Mass Transit: Pass-through to transit operators who determine priorities for funds Local Streets and Roads: Pass through to cities; formula weighted 50% by population and 50% on number of road miles. Bike/Ped Safety: Competitive grants, 25% allocated to regional projects and 75% to cities- each city can receive up to their proportional share based on population. Specialized Transportation Srs/Disabled: pass-through formula determined by PAPCO, generally based on population of seniors and disabled plus small "gap grant program." Transit Center Dev't: Competitive grants. 	<ul style="list-style-type: none"> Transit Operations: Pass through to be spent on maintaining or increasing service levels. Annual reporting on use of grant funds. Specialized Transportation: Combination of pass through and innovation grant funds, with funds allocated to the planning area rather than to individual cities to encourage coordination. Bike/Ped Program: Pass through plus grant-based program Local Streets and Roads: Pass through program for local roads plus a grant program for major corridors. Pass through allocated based on a combination of daytime population, nighttime population and road miles subject to upholding complete streets policy. (see row E) PDA/TOD/Climate Action (which will replace the current Transit Center program) (new) grants based Parking & Transportation Demand Management (TDM) (new): grant-based program Technology and Innovation (new): grant-based program Environmental Mitigation (new): grant-based program Goods Movement (new): grant-based program Planning and Project Management (new): agency administered for planning and project implementation costs
H	Rainy Day Fund	<ul style="list-style-type: none"> If annual receipts less than projected, funds would be programmed based on annual Strategic Plan 	<ul style="list-style-type: none"> Up to 50% of excess funds that result from higher than expected receipts, lower than expected project costs or the addition of leveraged funds from other sources will be maintained as funding for years with reduced receipts. 50% of these funds may be reallocated to accelerate implementation of high priority projects at the discretion of the Alameda CTC. Grant funding levels may be adjusted to allow for maintenance of base service levels and/or additional planning funds.
I	Other Considerations	<ul style="list-style-type: none"> Programs submit annual audits documenting use of funds. Independent oversight by CWC. Tier 2 list of projects to be funded if excess funds remain after accelerating Tier 1 projects and funding unmet senior and disabled needs. 	<ul style="list-style-type: none"> Continue policies for annual audits of programs. Continue oversight by CWC. If excess funds are available, allocate up to 50% to accelerate projects and programs and remainder to fund unanticipated needs and rainy day fund.

Issue/Parameter	Current Measure B	Recommendation for New TEP ¹
	<ul style="list-style-type: none"> Projects are allowed 1 year funding extensions by majority vote of the Board if needed. 	<ul style="list-style-type: none"> Projects are allowed 1 year funding extensions by majority vote of the Commission if needed and if project can demonstrate progress toward implementation.
I Excess Funds	<ul style="list-style-type: none"> In the event of excess revenue as a result of higher than expected receipts, lower than expected project costs, or the addition of leveraged funds from other sources: <ul style="list-style-type: none"> All excess revenue will be programmed in the Strategic Plan and disbursed based on geographic equity First priority will be to meet unanticipated requirements of Tier 1 projects (but no project may be given more than 15% over anticipated estimate) Second priority: address gaps in special transportation service for seniors/people with disabilities Next priority: funding Tier 2 projects based on Strategic Plan priorities and geographic equity 	<p>Excess revenue will be utilized as a rainy day fund and to accelerate high priority projects and programs.</p>



MEMORANDUM

To: Alameda CTC Staff and Committees
From: Bonnie Nelson
Date: August 9, 2011
Subject: Student Transit Pass Research Case Studies Summary

Student bus pass programs have been discussed during the development of the Alameda County CWTP & TEP and an application has been submitted by the Alameda County Office of Education for a free student pass for grades 6 – 12. To more fully understand student bus pass programs, this memorandum presents an analysis of existing conditions as well as past experience and peer examples to provide some “lessons learned” that could help shape an Alameda County student transit pass program. This memorandum includes current conditions, review of eight peer youth programs, eleven university programs, and one Alameda County employer-based program, the City of Berkeley’s EcoPass.

Current Conditions

School students in Alameda County are served by a combination of “yellow bus” and public transit service. In Alameda County, very few students have access to yellow school buses, resulting in more demand for school transportation from public transit operators. Students ride all of the transit operators in the County, including BART, AC Transit, Union City Transit and LAVTA, with most school trips for middle and high school public school students occurring by bus rather than by BART, which typically carries longer trips.

Of the three major bus operators in the County, Union City Transit and AC Transit currently offer significant discounts for youth riders. AC Transit offers a 50% discount off the cash fare and a 75% discount off of the full 31-day pass fare, charging students \$20 per month as of August, 2011 (passes increased in August from \$15 to \$20). Union City Transit offers a \$1 single ride for students and a \$30 monthly pass. Students aged 13 to 18 who are enrolled in middle or high school are eligible to purchase BARTT tickets at a 50% discount (colored orange). These “orange tickets” only come with a \$32 value and are sold for \$16. Children 5-12 years old may purchase BART tickets (colored red) at a 62.5% discount. These “red tickets” only come with a \$24 ticket and are sold for \$9.

Figure 1 shows the current conditions for youth riders throughout the Bay Area, and at transit properties nationally. The figure shows that even with the increase in pass price that occurred in August, AC Transit’s youth pass is among the lowest cost pass throughout the Bay Area and nationally. This does not suggest that further discounts would not bring additional benefits, but does show that Alameda County student travel costs (as a percentage of full transit fare) are already less than many of their peers.

Peer Case Studies

To gain insight into the benefits, costs and lessons learned from other deep discount or free pass programs, eight peer systems were identified and contacted to better understand their program and the outcomes they have experienced. In addition to looking beyond the Bay Area, we have included summary information from an AC Transit pilot program providing free bus passes to low-income youth from 2002-2004. That pilot program differed from the proposed program in a number of ways, most importantly in that it targeted *only* low-income youth. However, it does offer some important lessons that could help shape a future program.

Figure 1 Transit Agency Single and Multi-Fare Prices

Metro Area	Youth Discount - Single Ride?	Youth Discount - Weekly, Monthly, Value?	Cost of Fares								Ages Eligible	Other Eligibility Requirements?	Where to obtain youth pass?	Any restrictions on use?
			Single Fare			Multi-fare								
			Type	Regular \$	Youth \$	Youth %	Type	Regular	Youth	Youth %				
Bay Area Transit Operators Examples														
Livermore/Dublin/Pleasanton - LAVTA	No	No	Regular	\$2.00	\$2.00	100%	East Bay Value Pass	\$60.00	\$60.00	100%	6 and under are free	N/A	N/A	N/A
			Fare Buster 10-ride	\$1.60	\$1.60	100%								
Oakland – AC Transit* Alameda Contra Costa County *Fares effective Aug. 2011	Yes	Yes - 31 day monthly (w/ Clipper only)	Local	\$2.10	\$1.05	50%	31-day pass (Local)	\$80.00	\$20.00	25%	5 to 18	None	Two methods: 1) Attend card sign-up event w/ proof of age; 2) Visit AC Transit ticket office at 1600 Franklin St., M-F (8 AM - 6 PM) w/ proof of age	None
			Transbay	\$4.20	\$2.10	50%	31-day pass (Transbay)	\$151.20	N/A	N/A				
			Transfer (Bus to Bus)	\$0.25	\$0.25	100%	N/A	N/A	N/A	N/A				
			Transfer (BART to Bus)	\$1.85	\$0.80	43%	N/A	N/A	N/A	N/A				
			Transfer (Transbay to Local)	Free	Free	N/A	N/A	N/A	N/A	N/A				
Union City Transit	Yes	Yes	Local	\$1.75	\$1.00	57%	Monthly	\$46.00	\$29.00	63%	6 to 17	None	Mail, fax, email, or sold at City Hall	None
SF Bay Area - BART	No	Yes	N/A	N/A	N/A	N/A	BART Orange	\$32.00	\$16.00	50%	13 to 18	Enrolled in middle/secondary school; Only at participating schools	Orange tickets are sold by schools only. Schools collect payment in advance from students and place ticket orders directly with BART.	Only for school trips (M-F)
								BART Red	\$24.00	\$9.00				
Marin County – Golden Gate Transit	Yes	Yes	Regular	-	-	50%	1-day pass	\$5.00	\$2.50	50%	6 to 18	May also use Youth Clipper Card. ID may be required upon bus entry.	For GGT Youth passes, either online, phone, by mail, or at selected local vendors.	None
						7-day pass	\$20.00	\$10.00	50%					
						31-day pass	\$80.00	\$40.00	50%					
						Monthly	\$72.00	\$21.00	29%					
San Francisco -	Yes	Yes	Local	\$2.00	\$0.75	38%	Monthly				5 to 17	Monthly pass requires special Youth	Effective August 2011,	None

Metro Area	Youth Discount - Single Ride?	Youth Discount - Weekly, Monthly, Value?	Cost of Fares							Ages Eligible	Other Eligibility Requirements?	Where to obtain youth pass?	Any restrictions on use?
			Single Fare			Multi-fare							
			Type	Regular \$	Youth \$	Youth %	Type	Regular	Youth				
MTA			Special Event (round trip)	\$12.00	\$10.00	83%	Monthly (Lifeline)	\$31.00	TBD	TBD	Clipper Card and valid ID; Lifeline youth pass (pilot) requires enrollment in SFUSD school, and priority given for those who qualify for a free lunch under federal guidelines and who attend middle or high school	Youth Clipper cards bought either in person at SFMTA sales kiosks or online (and shipped by mail). Lifeline Youth passes distributed through school sites.	
	San Jose - VTA	Yes	Local	\$2.00	\$1.75	88%	Day Pass	\$6.00	\$5.00	83%	None	Prepaid fares must be bought in person and are available at various sales locations. Recently launched Clipper Card, which only allow for VTA monthly passes. For Clipper, must apply in person at one of two locations in San Jose w/ proof of age.	
			Community Bus	\$1.25	\$0.75	60%	8-hour Light Rail Pass	\$4.00	\$3.50	88%			
					Day Pass Token	\$5.40	\$4.50	83%					
			Monthly Flash Pass	\$70.00	\$45.00	64%							
			Annual Pass	\$770.00			Annual Pass	\$770.00	\$495.00	64%			
Other Major Metropolitan Transit Operators Examples													
Los Angeles - Metro	No	Monthly	Regular	\$1.50	\$1.50	100%	Monthly TAP Card	\$75.00	\$24.00	32%	Must be enrolled in accredited elementary, junior high or high school in LA County. Applicants must include with application either: a) current report card, b) current school ID, c) printout showing in-class schedule, d) letter on school letterhead showing signature of school official	Submit application in person or by mail: submit to one of four Metro Customer Centers or mail to TAP Service Center (addresses on application form)	Students in grades 9-12 must present valid ID along with TAP card
New York			0 - 1 mile from School (Grades 7 - 12)	\$ 2.25	\$ 2.25	100%	7-day pass	\$ 29.00	N/A	N/A	Students who receive a full-fare MetroCards must live: K-2: 0.5+ miles away Grades 3-6: 1 – 1.5 miles away Grades 7-12: 1.5+ miles away Students who receive a half-fare MetroCards must live: K-2: Less than 0.5 miles away Grades 3-6: 0.5 - 1 mile away Grades 7-12: 1 - 1.5 miles away	Schools distribute Student Metrocards to eligible students (without photos); varying benefits are dependent on students' distance from school,	Passes are valid from 5:30 AM to 8:30 PM on schooldays. Half-fare cards are only good on buses
	1 - 1.5 miles from School (Grades 7 - 12)	\$ 2.25	\$ 1.13	50%	30-day pass	\$ 104.00	N/A	N/A					
	1.5+ miles from School (Grades 7 - 12)	\$ 2.25	Free	N/A									
Tempe/Phoenix – Valley METRO	Yes	Yes	1-Ride	\$1.75	\$0.85	49%	All day pass	\$3.50	\$1.75	50%	Tempe Youth Program: 1) A parent or guardian must accompany the youth	You can get the pass at the Tempe Transit Store	None
						3-day pass	\$10.50	\$5.25	50%				

Metro Area	Youth Discount - Single Ride?	Youth Discount - Weekly, Monthly, Value?	Cost of Fares						Ages Eligible	Other Eligibility Requirements?	Where to obtain youth pass?	Any restrictions on use?		
			Single Fare			Multi-fare								
			Type	Regular \$	Youth \$	Youth %	Type	Regular					Youth	Youth %
					</									

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AC Transit Free Low-Income Student Bus Pass Pilot Project

Introduction

In 2002, AC Transit began a two-year demonstration project to provide free bus passes to low-income middle and high school students. The initiative was designed to, in part, “improve social equity by lessening the financial burden on low-income families and increasing opportunities for low-income students, improve school attendance rates, and increase participation in after-school and weekend enrichment programs.” Concurrent with this program, AC Transit also reduced the cost of its monthly student pass from \$27 to \$15.

At the onset of the program, the University of California, Berkeley, was provided funding to conduct an evaluation of the program during its first operational year. These findings were published in a 2004 paper entitled “Free Transit for Low-Income Youth: Experience in San Francisco Bay Area, California.”¹

Background

According to the article, implementation of the demonstration project was the result of a combination of “grassroots community activism and growing political pressure to remove the burden of school transportation costs from low-income households.” In particular, the program was spurred by conditions in the West Contra Costa school district, located at the north end of AC Transit’s service area, where, “excessively high absenteeism rates in the schools led to a \$1 million penalty in state funding.” Noting “decreased attendance during the last week of the month,” observers theorized that “students’ inability to afford bus fare” was one of the primary causes of poor attendance rates. In response to the perceived need, grassroots campaigns sprung up at a few schools in the 1990s to supply the neediest students with free transit passes. The pilot program was intended to reduce absenteeism, increase the use of transit among youth riders, increase student safety and create a “transit habit” at an early age.

Methodology

The primary goal of the UC Berkeley evaluation was “to determine how free transit affects youth travel, school attendance, and participation in after-school activities.” In order to measure the effectiveness of AC Transit’s free pass program, the authors utilized “before and after surveys, interviews, focus groups, and ridership analyses.” Interviews were conducted with students and administrators alike, including truancy officers to gauge how well the new policy affected “students with the most severe attendance problems.”

It should be noted that the UC Berkeley researchers identified one major methodological challenge to the research: because the study covered only the first year of a new fare policy, the findings would not reflect any long-term effects of the new policy. Instead of changing the habits of someone who is accustomed to skipping school, the article suggested, “the program may be more effective at creating good habits among younger students so that they don’t develop

¹ *Transportation Research Record: Journal of the Transportation Research Board No. 1887*, TRB, National Research Council, Washington, D.C., 2004, pp.153-160

attendance problems.” Still, the paper argued that, “it is useful for transportation planners to study youth travel behavior and the immediate effects of fare changes on behavior.”

Analysis

From UC Berkeley’s analysis of the AC Transit low-income student free pass (and \$15 non-low-income student pass), the researchers determined the following:

General

- Findings after one year of implementation indicate that the free bus pass program increased student bus ridership and after-school participation, but did not increase overall attendance. Increases in bus use were greater among pass holders, in areas with high levels of bus service, and among high school students.
- Although overall bus-to-school mode shares did not vary significantly in the two survey years before and after implementation, students receiving the free bus pass did increase their use of the public bus, primarily for trips other than travel to school.

After-School Programs

- After-school participation did increase, suggesting a more direct relationship between the availability of a transit ride home and participation after school.
- Coordinators described significant bus ridership after school, but stressed that safety concerns and student age are major factors influencing mode choice.
- When asked about ridership after school hours, many after-school program site leaders—particularly those working with younger students—cited bus stop safety as a major issue, especially when a program ends after dark.

Truancy and Attendance

- Data analysis showed no significant change in overall attendance from spring 2002 to spring 2003. Attendance rates among bus pass holders also remained constant, even when analyzed across age, gender, and racial and ethnic groups.
- Truancy prevention coordinators emphasized that truancy and transportation are linked, but successful reduction of truancy demands on more than a transit policy. Nonetheless, officers report that truant students regularly ride the bus when they do attend school, and a bus pass program is an important component of a comprehensive policy.

Conclusions & Organizational Impact

As indicated by the analysis above, UC Berkeley researchers’ findings were somewhat inconclusive. The project was significantly altered after the first year of its two-year demonstration, eliminating the free pass for some students and creating a deeply discounted \$15 monthly pass available to all students.

BART Student Pass Program

Program Description: BART sells two types of tickets to youth based on age (red: 5 to 12, orange: 13 to 18). Red tickets have no use restrictions while orange tickets may only be used for school trips, Monday through Friday. However, BART fare gates do not deny orange ticket use during non-school hours. Red tickets are distributed through authorized vendors while orange tickets are made available only through participating schools.

Cost to Student: Red ticket: \$9/month. Orange ticket: \$16/month.

Source of Funding: Paid for out of BART’s operating fund. No special funding.

Level of Subsidy: Total annual program cost is \$195,562 in FY2011/12.

Types of Transit: Rail

Measures of Success: There are approximately 141,000 annual trips made by orange ticket student riders in Alameda County, but no studies are available reporting on the ticket's effectiveness in increasing student ridership. However, there are also no significant reports of abuse reported to BART.

Pass Availability: Orange tickets are sold only by participating schools. Presently, 76 of Alameda County's 155 middle and high schools participate in the orange ticket program. Schools must apply to become a vendor of the orange ticket for their own students by filling out and submitting an application. Schools collect payment in advance from students and place ticket orders directly with BART. Some schools purchase an additional quantity to have as needed if students missed the school's cut-off date for order. A school check or money order is accepted along with the purchase request written on school letterhead. Schools can establish their own policies on eligibility to purchase tickets – ie. School attendance, maintenance of grade average etc. but these policies are not required or monitored by BART.

Other Case Studies

Tempe, AZ

Program Description: The Tempe Youth Transit Pass Program allows all eligible Tempe youth ages 6 to 18 to ride regional and local Valley Metro bus routes and the METRO light rail for free. The pass is a student-specific electronic pass (with photo), specific to Tempe.

Cost to Student: Free

Source of Funding: Paid for by the City of Tempe by a ½ cent dedicated sales tax (Tempe only).

Level of Subsidy: Completely funded by dedicated sales tax. Total annual program cost is \$423,416.

Types of Transit: Bus, Light Rail

Measures of Success: As of July 12, 2011 there are approximately 4,400 youth enrolled in the Tempe Youth Pass Transit Program. Begun in 2005, enrollment rates have doubled since the program's inception. While transit ridership has been increasing steadily over the life of this program, City staff is unable to tell if the increases are attributable to the Youth Pass Program, as many other service changes (new light rail, new bus routes, cuts to service frequency due to economy, etc.) have taken place over the same time period.

Pass Availability: Passes must be obtained at the Tempe Transit Store. In order to receive a youth pass, the following conditions apply: 1) A parent or guardian must accompany the youth when registering for the program; 2) The most recent utility bill (dated within the last 60 days) with a Tempe address. 3) Youth's birth certificate; 4) Valid driver's license/photo ID of parent/guardian; 5) If legal guardian, must also bring a copy of your marriage license or state guardianship papers.

New York, NY

Program Description: Transit passes given to K-12 students, either at no cost or at half price, depending on the home address distance from school. Passes are valid from 5:30 AM to 8:30 PM on schooldays.

Cost to Student: No cost or 50% based on location

Source of Funding: Equal funding amounts by State of New York and City of New York. Total annual program cost is \$161,500,000.

Level of Subsidy: Varies. Until the 1990s the program was entirely paid for by state and local governments, at which time the State of New York and City of New York limited their contributions to \$45 million each, annually. Currently, MTA must partially fund the program at an amount that depends on the level of funding provided by City and State budgets (fluctuates from year to year). A major lesson learned was the unpredictability of funding for the program given the current political and economic climates.

Types of Transit: Bus, Rail

Measures of Success: Approximately 417,243 students now receive free Metrocards and another 167,912 get half-fare cards.

Pass Availability: Schools distribute Student Metrocards to eligible students (without photos); varying benefits are dependent on students' distance from school, as shown in the table below:

		DISTANCE FROM RESIDENCE TO SCHOOL			
		Less than ½ mile A*	½ mile or more, but less than 1 mile B*	1 mile or more but less than 1½ miles C*	1½ miles or more D*
GRADE LEVEL	K-2	Not Eligible**	Eligible for Full Fare Transportation		
	3-6	Transportation Not Provided			
	7-12	Transportation Not Provided	Not Eligible**		

Source: <http://schools.nyc.gov/Offices/Transportation/ServicesandEligibility/BusTransportation/default.htm>

Portland, OR

Program Description: Free all-zone Tri-Met pass for all high school and alternative students at Portland Public Schools (the second largest school district in the Portland area). The pass is simply the student's identification card.

Cost to Student: Free

Source of Funding: In Portland, the program is funded by \$2.55 million a year from TriMet, all of which is indirectly funded by the state in the form of a Business Energy Tax Credit,² combined with \$800,000 from the school district. Total annual program cost is \$3.5 million.

Level of Subsidy: Complete (at no cost to transit agency), passes provided to students in lieu of school bus service.

Types of Transit: Bus, Light Rail

Measures of Success: Increases in ridership as a result of Youth Pass program are as follows.

- Prior to Youth Pass program, 44% of students used TriMet to get to school.
- Since program implementation, 80% of students use TriMet frequently or every day.

² See: http://portlandafoot.org/w/Business_Energy_Tax_Credit

- Ridership is highest in schools serving the most low-income students of color where transit options are fewest.³

Pass Availability: Students may obtain passes at a host of locations, including on the bus, at light rail and commuter rail stations, online, at neighborhood ticket outlets, or at school. Those in grades 9-12 or ages 15-17 must provide proof of age or student status upon fare inspector or transit operator request, and a TriMet-issued ID card is required to prove GED student status.

Washington DC

Program Description: Youth who live and attend school (18 years or younger) within the District of Columbia are eligible to receive transit passes at half-price. Currently there are no use restrictions and students may use the pass during all hours of operation.

Source of Funding: District of Columbia (passes provided in lieu of school bus service).

Cost to Student: \$30/month

Level of Subsidy: Paid for by City (\$5 to \$6 million per year).

Types of Transit: Bus, Rail

Measures of Success: About 16,000 D.C. students receive subsidized rides on Metro during the school year. Metro board members have discussed limiting the passes to certain days and hours in response to a crime report showing that juveniles made up one-fourth of all arrests by the transit agency last year. Crime spiked on the transit system in 2010, with assaults and robberies of smartphones on the rise.

Pass Availability: SmartStudent Passes have the following set of eligibility requirements:

1. Students must be under 19, except for students with disabilities, who remain eligible until they turn 22.
2. Students must reside in the District of Columbia and attend a District public, charter, parochial, or private school.
3. Students must use Metrobus and Metrorail for travel to and from school and related educational activities.
4. Students are certified as eligible by the District Department of Transportation (DDOT).
5. Students must possess a valid Student Travel Card issued by the District Department of Transportation/Mass Transit Division. Students can obtain this card by completing a Student Metro Travel Card Application, having it signed and dated by the school principal or administrator, and submitting it to DDOT.
6. Students must present a Student Travel Cards when purchasing a SmartStudent Pass.
7. The SmartStudent pass is good for unlimited travel within the District for a period of one month at a cost of \$30 or as otherwise provided by DDOT.

Fort Collins, CO

Program Description: All citizens under the age of 17 living in Fort Collins are allowed to ride transit for free.

Cost to Student: Free

Source of Funding: Bohemian Foundation has provided the City of Fort Collins a grant to subsidize the Youth Fare Program.

³ http://www.oregonlive.com/opinion/index.ssf/2011/06/trimet_youth_pass_creating_our.html and <http://portlandafoot.org/w/YouthPass>

Level of Subsidy: Completely funded by private foundation. All citizens under the age of 17 are allowed to ride transit for free.

Types of Transit: Bus

Measures of Success: 15% of total 2010 ridership was by youth (17 or younger).⁴

Pass Availability: Not applicable (Youths up to the age of 17 ride for free).

Sacramento, CA

Program Description: Students between the ages of 5 and 18 are given a transit pass at a 50% discount.

Cost to Student: \$50/month

Source of Funding: Measure A (countywide sales tax).

Level of Subsidy: Unknown.

Types of Transit: Bus, Light Rail

Measures of Success: As of 2002 (one year after program started), “research by RT staff shows a more than 30% increase in student ridership on regular RT routes serving middle and high schools, as well as an increase in student pass sales.”⁵ The program has since been scaled back (students aged 5 to 18 used to receive a 75% discount, now they receive a 50% discount—same as seniors/disabled).

Pass Availability: Student fares and passes may be purchased in person, by phone, by mail, or online. Additionally, Student Monthly Stickers are sold at most high schools and some middle schools. Eligible passengers must be pursuing a high school diploma, and RT Student stickers must be affixed to an RT Student photo ID card, not a photo ID. Finally, students are eligible to purchase single fares and daily passes with their school ID.

San Diego, CA

Program Description: Residents ages 6 through 18 are eligible for a Compass Regional Fare Card at a 50% discount. School or transit youth identification card is required.

Cost to Student: \$36/month

Source of Funding: Funded by *TransNet* funds (local half-cent sales tax).

Level of Subsidy: Completely funded by *TransNet* funds at no cost to transit agency (passes sold at 50% discount).

Types of Transit: Bus, Light Rail

Measures of Success: SANDAG has never looked at ridership trends specific to youth passes.

Pass Availability: Eligible students and youths may purchase discount passes either online, at neighborhood outlets, or in person at the downtown Transit Store. School or transit youth identification card is required.

⁴ http://www.larimer.org/compass/ridership_cd_transport.htm#Chart3

⁵ <http://portal.sacrt.com/WebApps/PressReleases/PressReleases.asp?ShowPressID=31>

University Programs

In addition to youth transit pass programs, a number of universities, including UC Berkeley, offer a “class pass” that provides free transit to students, and is generally funded through student fees. Presented below are eleven case studies from various academic institutions. Figure 2 and Figure 3 show the effects that transit pass programs have had on drive alone rates, transit rates, and ridership at other universities.

Figure 2 Effects of Universal Transit Pass Introduction, Trip to Work/School

Location	Drive to work or school			Transit to work or school		
	Before	After	Delta	Before	After	Delta
UC Berkeley (students)	16%	7%	-9%	14%	27%	13%
UCLA (faculty and staff)	46%	42%	-4%	8%	13%	5%
Univ. of Washington, Seattle	33%	24%	-9%	21%	36%	15%
Univ. of British Columbia	68%	57%	-11%	26%	38%	12%
Univ. of Wisconsin, Milwaukee	54%	41%	-13%	12%	26%	14%
Colorado Univ. Boulder (students)	43%	33%	-10%	4%	7%	3%

Figure 3 Transit Ridership Growth from U-Pass Programs

University	Year began	First year increase in student ridership			Subsequent growth rate (% per year)
		Before	After	Change	
CSU, Sacramento	1992	315,000	537,700	+ 71%	+ 2%
UC Davis	1990	587,000	1,054,000	+ 79%	+ 10%
University of Wisconsin, Madison	1996	812,000	1,653,000	+ 104%	*
University of Illinois, Urbana-Champaign	1989	1,058,000	3,102,000	+ 193%	+ 8%
University of Colorado, Boulder	1990	300,000	900,000	+ 200%	+ 8%

Subsequent growth rate is not available because the program started in 1996.

UC Berkeley Class Pass Program

Program Description: Passes given to all students at UC Berkeley.

Source of Funding: The Class Pass is funded by a \$69.50 portion of every student's registration fees each semester.

Level of Subsidy: Complete (at no cost to transit agency).

Measures of Success: Mode split changes observed as a result of the Class Pass Program:

- Overall student transit mode share has grown from 14% in 1997 to 27% in 2008.
- Student drive-alone share fell from 16% to 7% during the same period.
- 20% of UC Berkeley students now commute by AC Transit, according to the most recent survey of student commute patterns.

The class pass program also provides substantial benefits to many students who do not commute by AC Transit, but who use the pass for non-school trips: while 6,900 students commute by AC Transit, many more (about 33,000) pick up their Class Pass each year. Many students find that the program helps them meet their transportation needs without having to bring a car to campus.

Stanford "GO-Pass" Pilot Program:

Program Description: The Stanford Go-Pass Program allows free unlimited use of local transit (VTA buses and light rail) and Caltrain for all eligible university employees⁶. The program was recently expanded to include off-campus graduate students, who are now able to purchase a GO-Pass for \$99.50/year.

Source of Funding: Stanford must purchase passes for all eligible employees and enrolled off-campus graduate students at the cost of \$99.50/year per pass. This is a deep discount resulting from the bulk purchase, as the regular monthly pass price is \$60-259 per month.

Stanford also offers an "Eco Pass" program for university and Stanford Hospital employees, which is valid for unlimited rides on VTA buses, light rail, Dumbarton Express, Highway 17 Express, and Monterey-San Jose Express.

Level of Subsidy: Complete (at no cost to transit agency).

Measures of Success: Stanford has documented the following results from these pass programs:

- Drive alone mode share from 72% to 63%, a 12% decrease;
- Caltrain use from 4% to 10%, a 150% increase.

University of San Francisco

Program Description: All students at University of San Francisco pay a \$90 annual fee as part of their annual student fees to be able to ride Muni free. They must go to the Student Office at the start of every semester to get a new sticker on their ID to allow them to board Muni buses. The passes are valid when school is in session. Staff at the student office reported that there are very few students who do not take advantage of the program by getting their sticker.

University of Colorado

Program Description: The U-pass program allows each eligible permanent faculty or staff member to ride local or regional buses by showing their University identification card. This program has resulted in some employees taking transit instead of driving to campus, freeing up 350 parking spaces. It was 2.4 times more expensive to build a new parking space than to eliminate demand for one parking space through funding this transit pass program.

Measures of Success: The net annual savings to the University was \$566,000.⁷

Vancouver, B.C. U-Pass Program

Program Description: Passes given to students at the University of British Columbia, Simon Fraser University, Capilano University and Langara College.

⁶ The GO Pass program offers FREE transit to university employees who work 50 percent or more, receive regular Stanford University benefits, and are on campus primarily for employment at the university. Individuals must live off Stanford property (Stanford West and Oak Creek Apartments are on Stanford property) to be eligible for the GO Pass. http://transportation.stanford.edu/alt_transportation/EcoPass.shtml

⁷ University of Colorado Environmental Center 2002, pp. 18-19, cited in "The Road Less Traveled: Sustainable Transportation for Campuses" by Will Toor. *Planning for Higher Education*, March-May 2003, p. 135.

Source of Funding: Paid for by Universities through student fees.

Level of Subsidy: No cost to transit agency, except for lost revenue as a result of illicit trade of U-Passes.

Measures of Success: Translink has implemented a U-Pass program with the University of British Columbia, Simon Fraser University, Capilano University and Langara College. Since 1997, the University of British Columbia has more than doubled transit ridership to campus, and now 12,000 fewer cars visit campus each day.⁸ The program is set to expand this fall to Douglas College, Kwantlen Polytechnic University and BCIT. However, the illicit use of U-Passes costs the agency about \$15 million per year, and has prompted the agency to threaten to discontinue the program.

City of Berkeley Employee Program

Program Description: The City of Berkeley purchases AC Transit passes for all City employees.

Source of Funding: The City pays \$67 per year per employee for 1,374 passes, or approximately \$92,000 per year for the entire program.

Level of Subsidy: No cost to transit agency.

Measures of Success: 240 employees use their EcoPass each month, taking almost 49,000 bus trips annually. 20% of former drive alone employees now use EcoPass/AC Transit. 59% of users have reported they would reduce or stop riding the bus without the EcoPass.

Program Considerations

The peer studies presented in this memorandum show a range of potential outcomes for a student pass program. However, there are a number of lessons learned which may be useful in considering a program in Alameda County.

Ridership

The study of the pilot program conducted by AC Transit provides the most detailed information regarding ridership impacts. Findings from the report and AC Transit indicate that although bus ridership did increase (by 25%), particularly among pass holders, the rise was primarily due to after-school programs and non-school related travel. By contrast, in the one year of the pilot program, bus-to-school mode shares remained stable. The increase in after-school bus use appeared to be mainly driven by the availability of transit.

Other case studies have found significant increases in transit ridership after the introduction of youth pass programs, but it is often unclear from available data precisely what students (middle or high school) and what hours (primary class times or non-school hours) experienced the most dramatic increases. The TriMet Youth Pass program in Portland increased use of transit to access schools from 44% to 80%, with high ridership in schools serving larger numbers of low-income students of color.⁹ This information shows that by increasing transit availability to low-income youth, ridership can dramatically increase. Similarly, research of the 2002 youth pass program in Sacramento showed a 30% increase in student ridership, but again the data did not distinguish between time of trips.

The time at which peak youth ridership is achieved is a very important element. For example, if a free transit pass program increases student ridership during the AM and PM peak commute hours

⁸ <http://trek.ubc.ca/>

⁹ http://www.oregonlive.com/opinion/index.ssf/2011/06/trimet_youth_pass_creating_our.html

when buses are already fully occupied, the transit provider will need to spend considerable funds increasing service. However, if student ridership primarily increases during off-peak weekday hours or weekend hours when buses have capacity, additional service may not be necessary and costs to the transit agency may be lower. As research of the AC Transit study shows, student ridership mainly increased during after school events and other non-peak times, such as weekends, whereas student ridership from home-to-school during regular class hours remained relatively constant. Any future youth transit pass program should examine the likely peak hours of students transit demand to establish accurate cost estimates.

Cost

The review of peer case studies revealed that the clear majority of transit providers offer some level of price reduction for youth transit passes, although providers each have different purchase rules and age restrictions. For example, AC Transit currently offers one of the deepest price reductions (75% discount) for youth passes compared to other agencies within and outside the Bay Area. BART offers 50% and 62.5% discounts on orange and red tickets, respectively. Other Bay Area agencies offer smaller scale discounts, with Union City Transit giving a 37% reduction and LAVTA offering none. In order to determine the cost of a potential free student pass program to the transit providers, it is necessary to examine several factors:

1. **The current revenue transit providers receive from student cash fares and monthly passes.** If students are provided with free passes, the transit operators will need to be compensated for fare revenue that will be lost from current riders.
2. **The revenues transit providers would have received from increased ridership.** Providing free transit to youth riders will likely result in significant additional ridership. Those riders would have paid fares, generating revenue to the agency. If new riders are filling empty seats on existing routes, an argument can be made that the marginal cost of carrying those riders is minimal. However, school peak times tend to overlap with peak service periods, requiring new service to cover a significant influx in new riders. Transit agencies will want to be compensated for the cost of carrying new riders including lost fare revenue.
3. **The funds necessary to finance new transit service due to increased ridership.** Assuming the program is successful, there would likely be considerable strain put on the existing transit systems. Bus routes during school hours are likely to be overloaded, as school peaks are already prime hours for transit use. To the extent that additional service is required, new revenue will be needed to cover service costs.

The first item assumes that if transit passes are free to students, the participating transit agencies would need to be compensated for their lost revenue. Estimates for potential lost revenue from existing riders were provided by representatives from the transit providers through FY 2025/26. For example, AC Transit estimated revenues of \$4,085,544 and \$5,071,577 for youth cash fares and monthly passes, respectively in FY 2014/15.

Lost revenue from increased riders and the required funds needed to provide new transit service are more difficult to calculate. The cost of servicing new riders during hours when there is excess capacity is minimal, but additional ridership during school peaks would require additional service that would be expensive to provide. Moreover, many schools in Alameda County are not currently served by public transit, and providing free passes to students would likely increase demand for new services. Representatives from AC Transit and LAVTA have predicted costs of supplemental transit service to meet increased ridership, but it is unclear whether those estimates assume all, or only a portion, of new student riders will travel during the peak commute period.

Figure 4 shows the estimated costs of service through FY 2025/26 as provided by the transit operators. These costs are itemized by transit agency and by the cost components listed above. Figure 5 shows how those figures result in per student annual and monthly costs. Figure 6

estimates annual program costs (based on the per student monthly costs from Figure 5) if passes were only given to socioeconomically disadvantaged students.¹⁰

¹⁰ Public school student enrollments provided by California Department of Education. Future enrollments are assumed to be stable as grade 6-12 student enrollments have remained relatively flat since the 2003/2004 school year.

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Figure 4 Total Annual Cost Estimates by Transit Agency

Agency	FY 2011/12	FY 2012/13	FY 2013/14	FY 2014/15	FY 2015/16	FY 2016/17	FY 2017/18	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	FY 2025/26
AC Transit															
Replacement Revenue from Youth Cash															
Fares & Passes	\$7,727,443	\$7,727,443	\$9,157,121	\$9,157,121	\$9,157,121	\$10,873,870	\$10,873,870	\$13,254,776	\$13,254,776	\$13,254,776	\$13,784,967	\$13,784,967	\$14,315,158	\$14,315,158	\$14,315,158
Required Revenue from New Ridership (assuming a 25% increase)	\$1,931,861	\$1,931,861	\$2,289,280	\$2,289,280	\$2,289,280	\$2,718,467	\$2,718,467	\$3,313,694	\$3,313,694	\$3,313,694	\$3,446,242	\$3,446,242	\$3,578,789	\$3,578,789	\$3,578,789
Funds Necessary for New Transit Service	-	\$2,221,050	\$3,331,575	\$3,997,890	\$4,886,310	\$5,552,625	\$5,663,678	\$5,776,951	\$5,892,490	\$6,010,340	\$6,130,547	\$6,253,158	\$6,378,221	\$6,505,785	\$6,635,901
LAVTAMHEELS															
Replacement Revenue from Youth Cash															
Fares & Passes	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000
Required Revenue from New Ridership (assuming a 25% increase)	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Funds Necessary for New Transit Service	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000
Union City Transit															
Replacement Revenue from Youth Cash															
Fares & Passes	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000	\$180,000
Required Revenue from New Ridership (assuming a 25% increase)	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000
Funds Necessary for New Transit Service	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
BART															
Replacement Revenue from Youth Cash															
Fares & Passes	\$195,562	\$203,049	\$205,786	\$209,055	\$214,358	\$219,891	\$222,722	\$227,153	\$244,024	\$255,997	\$261,124	\$268,260	\$273,895	\$278,351	\$282,002
Required Revenue from New Ridership (assuming a 25% increase)	\$48,891	\$50,762	\$51,447	\$52,264	\$53,589	\$54,973	\$55,681	\$56,788	\$61,006	\$63,999	\$65,281	\$67,065	\$68,474	\$69,588	\$70,500
Funds Necessary for New Transit Service	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Totals	\$10,646,757	\$12,877,165	\$15,778,209	\$16,448,611	\$17,343,658	\$20,162,826	\$20,277,417	\$23,372,361	\$23,508,990	\$23,641,806	\$24,431,160	\$24,562,692	\$25,357,537	\$25,490,671	\$25,625,350

Figure 5 Per Student Cost Estimates

	FY 2011/12	FY 2012/13	FY 2013/14	FY 2014/15	FY 2015/16	FY 2016/17	FY 2017/18	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	FY 2025/26
Estimated Number of Students	115,168	115,168	115,168	115,168	115,168	115,168	115,168	115,168	115,168	115,168	115,168	115,168	115,168	115,168	115,168
Annual Cost per Student	\$92.45	\$111.81	\$137.00	\$142.82	\$150.59	\$175.07	\$176.07	\$202.94	\$204.13	\$205.28	\$212.13	\$213.28	\$220.18	\$221.33	\$222.50
Monthly Cost per Student	\$9.24	\$11.18	\$13.70	\$14.28	\$15.06	\$17.51	\$17.61	\$20.29	\$20.41	\$20.53	\$21.21	\$21.33	\$22.02	\$22.13	\$22.25

Figure 6 Total Annual Cost Estimates for Socioeconomically Disadvantaged Students

	FY 2011/12	FY 2012/13	FY 2013/14	FY 2014/15	FY 2015/16	FY 2016/17	FY 2017/18	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	FY 2025/26
Estimated Number of Students	48,321	48,321	48,321	48,321	48,321	48,321	48,321	48,321	48,321	48,321	48,321	48,321	48,321	48,321	48,321
Total Annual Cost	\$4,467,056	\$5,402,868	\$6,620,058	\$6,901,338	\$7,276,873	\$8,459,710	\$8,507,789	\$9,806,334	\$9,863,659	\$9,919,385	\$10,250,574	\$10,305,760	\$10,639,253	\$10,695,112	\$10,751,620



As a point of comparison, the costs of the potential Alameda County pass program have been compared to some of the case studies shown in this memo. Figure 7 shows that the estimated monthly cost of \$14 per student in FY 2014/15 is reasonable when measured against programs in other cities. It should be noted that the costs for the Tempe, AZ, program are relatively low given that the operator did not need to add any additional service following program implementation.

Figure 7 Cost Comparison to Case Studies

City	Total Cost of Program	Monthly Cost of Program	Number of Students/Youth Served	Monthly Cost per Student
Tempe, AZ	\$423,416	\$42,342	4,400	\$10
Alameda County (FY2014/15)	\$16,448,611	\$1,644,861	115,168	\$14
UC Berkeley	\$4,798,975	\$479,898	34,525	\$14
New York, NY	\$161,500,000	\$16,150,000	585,155	\$28
Portland, OR	\$4,300,000	\$430,000	13,000	\$33

School Attendance

Although available research indicates that a youth pass program can increase after-school and overall student ridership, data from the AC Transit pilot program demonstrated no significant change in attendance from providing free passes. Researchers noted that instead of changing truancy habits itself, the program may be more effective at promoting good attendance among younger students so future truancy problems do not arise. As part of that study, truancy prevention coordinators did note that the lack of transportation may be linked to increases in truancy, but stated that it must be part of a broader package to increase school attendance. Researchers agreed that student attendance is a complex subject that requires comprehensive measures to affect long-term change, but ultimately stated that, "No research was found that directly linked transit affordability and use to student attendance and participation..."

As noted above, according to other case studies, student ridership increased substantially once a youth pass program was implemented, but available research does not address conclusively whether school attendance increased. Given the results from the AC Transit study, it is likely that the greatest increases in ridership occurred during non-primary school hours (after school & weekend).

Program Design Issues

In addition to the program considerations addressed above, there are other relevant issues that will need to be addressed prior to implementation of any youth pass program.

- **Funding:** The cost tables presented above show the very high costs associated with offering free youth transit passes. In order for the participating transit agencies to simply recoup the costs of offering passes and providing sufficient transit service, the amount will rise from \$16.4 million in FY 2014/15 to \$23.5 million in FY 2019/20 with monthly costs per student rising from \$14.28 to \$20.41.

Measure B currently provides funding to AC Transit for mass transit programs, which amounted to about \$15.6 million in FY 2009/10¹¹, excluding paratransit funding. If the proposed program were to be fully funded by Measure B, the initial amount of funding for AC Transit, as an example, would need to be roughly doubled. Additional funds would also need to be made available to other transit operators.

- **Pass Distribution:** In order for the youth pass program to be widely used and successful, it must reach a wide audience. Research has shown that students in low-income areas are generally less likely to obtain a transit agency's youth pass, especially if passes are only available at transit providers' offices, if obtaining a pass requires adult supervision or multiple forms of identification, or if there are limited distribution locations. Issues associated with distribution will need to be considered along with implementation.
- **Clipper Coordination:** In order to promote use of a youth pass program, it may be possible to combine the student IDs that are issued by all public schools with a Clipper card chip. By tying student IDs to the Clipper system, it would be possible to measure results and allow the program to be tailored in the longer term to maximize benefits. It must be recognized that the Clipper technology is not installed on all transit operators at this time, which presents a challenge to implementing a comprehensive countywide program. Therefore, crafting a program to meet the needs in each area of the County will be an important consideration.
- **Fraud and Abuse.** Any new youth pass program should have protections in place to prevent fraudulent use of transit passes. By instituting photo identification (as is currently done in Sacramento and Tempe, AZ) along with the Clipper chip on each pass, transit agencies would be able to limit the amount of abuse and track misuse of cards if it arises.
- **Ridership Restrictions:** Depending on the costs associated with a youth pass program, transit agencies may feel compelled to place limitations on student passes to avoid a surge of student riders during peak commute periods that could impact adult transit commuters. Student overcrowding during these periods may detract from a quality transit experience, which could lead current adult commuters to stop using transit.

In order to avoid this, transit agencies may place restrictions on youth pass hours of use, identification of specific routes for free passes, or other factors that would reduce the overcrowding of buses. In addition, restrictions may be put in place for security reasons, as the case study from Washington, DC, has shown a spike in juvenile arrests aboard transit vehicles due to increased ridership.

- **Fully Allocated Program Costs:** The program costs provided in this memorandum are based on estimates provided by the transit operators and do not account for the administration of a program that could cover approximately 115,000 students. In order to properly oversee the pass program, there will likely be additional expenses for administration at the transit agencies as well as coordination with local schools. Coordinating the program among multiple transit agencies could further impact program design and administration.

¹¹ Alameda County Transportation Commission, Compliance Report and Audit Summary for the Pass-through Fund Program, Fiscal Year 2009-2010.

- **Unintended Costs of Success:** Anyone who has ever ridden a bus that has just picked up a full load of junior high school students knows that riding a bus that is crowded with youth riders can be a challenge. The program needs to be designed in ways that ensure that full fare and other reduced fare riders will not be intimidated or encouraged to take other modes during school hours. Another unintended issue may be the apparent misuse of funds providing free services to some students whose families can either well afford for them have a \$20 monthly pass or prefer for their students to use other modes to travel to/from school. It is important that the program design meet the goals of the program to improve school attendance and remove barriers to transit use while creating a new generation of transit riders, while minimizing the unintended consequences that could result from a poorly designed program.
- **Availability of Service:** Providing students with a pass is not the same thing as providing students with a route to their school. Many junior high or high school trips in the County are currently not well served by transit. Simply providing free bus passes will not create new service, but may create the demand for a significant amount of costly peak hour service that cannot be fulfilled.

Conclusion

Done correctly, a youth pass program could improve school attendance particularly for economically disadvantaged students while creating a new generation of transit riders. A program pilot could be developed and funded over a three year period with built in evaluation and then amended as needed to maximize positive results. The pilot program should carefully consider:

- **Who should receive a pass?** Students in the more urban parts of the county are more likely to attend schools that are well served by transit. Should passes be universally distributed even though some schools have little or no transit service? Should passes be given to all students or only those identified as economically disadvantaged? Is there an option for parents who can afford passes to activate a Clipper card with their own funds, rather than using tax payer funding for their children? Will there be an “opt out” for parents who would prefer that their student not have a pass? Should different types of programs be implemented in different areas of the county?
- **What should the pass media be and can it be linked to Clipper?** The availability of Clipper allows for tracking of pass use in a way that was not possible in the past. It may be possible to link a Clipper card with a student ID card. Linking the clipper chip with the ID card would reduce the potential for fraud and abuse and could allow for a very flexible program design.
- **Should there be any requirements on students to receive a pass?** Considerations could include school attendance, GPA, potential to ride transit, etc.
- **Should transit agencies be compensated for the fare revenue for new riders?** How transit agencies are compensated is a critical consideration in designing the pass program.
- **Should there be funding for new service for overcrowded routes or for new routes serving schools that either don’t have service or don’t have adequate service.**

Giving students passes will no doubt create demand for new services. How much funding should be available for school related service? How would increasing school service be weighed against the need to restore other service cuts?

- **What about encouraging the use of other modes?** Many parents would prefer for their student to walk or bike to school and may not be interested in a bus pass. How would this program relate to Safe Routes to School and other initiatives?
- **Does there need to be a travel training or educational component?** The youth pass program assumes that the cost of a pass is a barrier to youth ridership. There may be other barriers including lack of service, but also including lack of information or travel training. Should the program include a travel training component that would teach students how to use schedules and route maps, how to navigate the system, and how to conduct themselves on transit?

Alameda County TEP Update Fall 2011 Survey

Survey planning document
August 29, 2011



EMC Research, Inc.
436 14th Street, Suite 820
Oakland, CA 94612
(510) 844-0680
EMC #08-3893

DRAFT

Sample Plan

- ▶ Telephone Survey of Alameda County Voters
- ▶ 800 interviews total
- ▶ Margin of error \pm 3.4 percentage points
- ▶ 15 minutes average survey length.
- ▶ Interviews to be in English, Spanish & Cantonese
- ▶ Smaller regions of the county will be oversampled so that there are enough interviews in each to look at regional priorities
- ▶ Results will be weighted to reflect likely voter population distribution in November 2012

Region	# of interviews	Margin of Error (\pm)	Weighted % of Population
Central Alameda Co.	176	7.4	21%
East Alameda Co.	150	8.0	15%
North Alameda Co.	300	5.7	46%
South Alameda Co.	176	7.4	18%
Total	802	3.5	100%

One Objective; Four Options

3

Objective: A one-cent permanent sales tax in Alameda County dedicated for transportation funding.

Option 1: Extend and Augment

- Evergreen existing $\frac{1}{2}$ cent
- Add another $\frac{1}{2}$ cent
- Expenditure plan is for new $\frac{1}{2}$ cent now, then for full cent after current Measure B expiration date

Option 2: Extend Now, Augment Later

- Evergreen existing $\frac{1}{2}$ cent
- Go back to ballot later to add another $\frac{1}{2}$ cent

Option 3: Augment Now, Extend Later

- Establishes a new $\frac{1}{2}$ cent permanent sales tax measure (separate from Measure B)
- Expenditure plan is only for new $\frac{1}{2}$ cent
- Go back to ballot later to extend Measure B

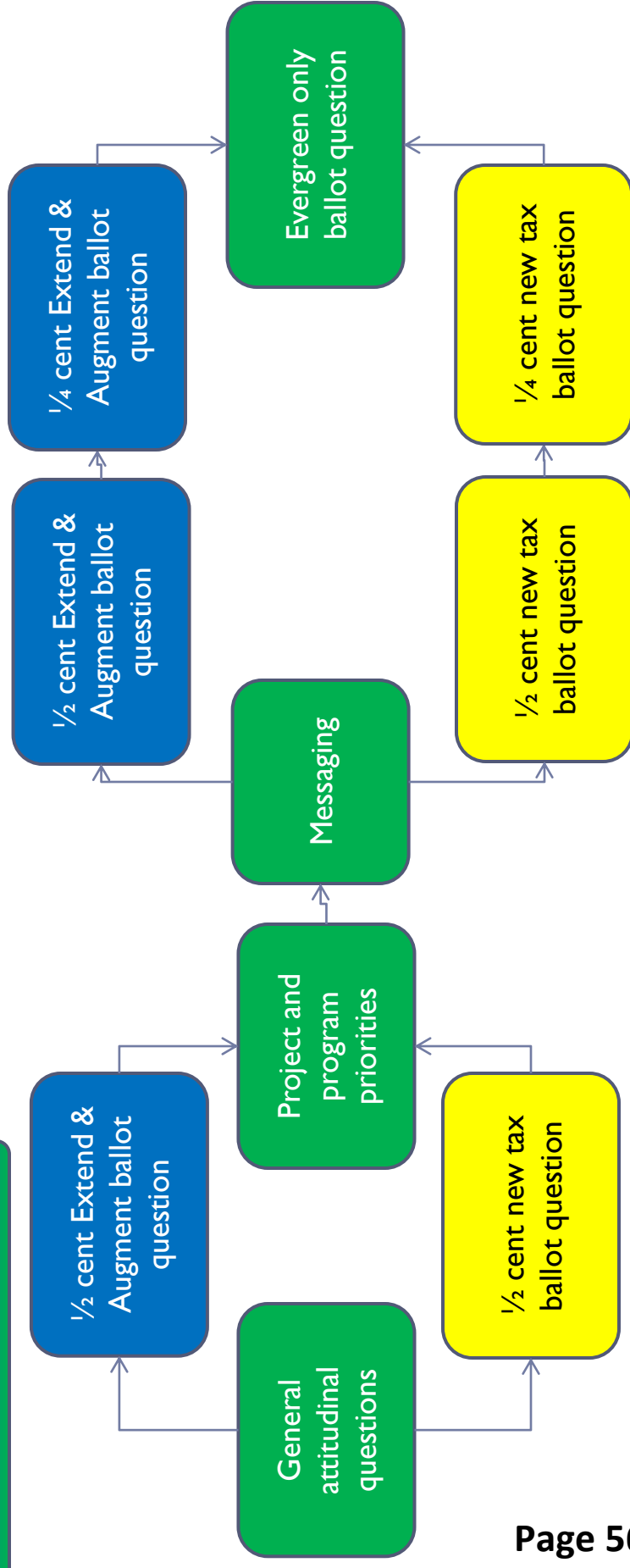
Option 4: Do Nothing in 2012

Questionnaire structure

4

Half get Option 1 ballot question (Extend & Augment), half get Option 3 ballot question (Augment Now, Extend Later – new tax)

Sample A: Option 1



Sample B: Option 3

Sample A-B Plan

Region	# of interviews	Margin of Error (\pm)	Sample A/B interviews	Sample A/B Margin of Error (\pm)
Central Alameda Co.	176	7.4	88	10.4
East Alameda Co.	150	8.0	75	11.3
North Alameda Co.	300	5.7	150	8.0
South Alameda Co.	176	7.4	88	10.4
Total	802	3.5	401	4.9

- ▶ Sample A/B split will only be in effect for the ballot questions, and potentially one or two of the messages tested.

Survey Next Steps

6

▶ Draft ballot questions to test

- ▶ **March 2011 survey:** There may be a measure on the ballot next year in Alameda County that would extend the existing half cent transportation sales tax to address an updated plan for the county's current and future transportation needs. The money from this measure could only be spent on the voter-approved expenditure plan, and all money from this measure would stay in Alameda County and could not be taken by the state (72% yes).
- ▶ **March 2010 survey question 1:** There may be a measure on a future ballot in Alameda County that would extend the half cent transportation sales tax that is used to pay for a number of road and transit improvements all across Alameda County (48% yes).
- ▶ **March 2010 survey question 2:** As you may know, this sales tax is currently being used to pay for a number of important projects in Alameda County, including the Bart Warm Springs extension in Fremont, the widening of Highway 238, public transit operations and access for seniors and the disabled, as well as to repair roads and fund bicycle and pedestrian improvements (56% yes).

▶ Refine project and program list to test

▶ Craft messages to test

Survey Timeline

7

- ▶ August 26-31: Draft questionnaire & circulate with team for review and edit.
- ▶ September 1: Draft questionnaire ready for distribution and public review.
- ▶ September 22: Questionnaire approval by Steering Committee.
- ▶ September 26 – October 6: Survey pre-test and field period.
- ▶ October 27: Presentation of results to Steering Committee.

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Telephone Survey of Alameda County Voters

EMC 11-4453

n=802

DRAFT September 2, 2011

Region	Quota
Central	176
East	150
North	300
South	176

QUESTIONNAIRE

Tracked questions are indicated by the designation "(T)."

Hello, my name is _____, may I speak with **(NAME ON LIST)**. **(SPEAK TO NAME ON LIST ONLY)**

Hello, my name is _____, and I'm conducting a survey for EMC Research to find out how people in your area feel about some of the different issues facing them. We are not trying to sell anything, and are collecting this information on a scientific and completely confidential basis.

AGE FROM SAMPLE

1. 18-29
2. 30-39
3. 40-49
4. 50-64
5. 65+
6. BLANK

1. **SEX (Record from observation)**

1. Male
2. Female

2. Are you registered to vote in Alameda County?

1. Yes → CONTINUE
2. No → TERMINATE

3. (T) Do you think things in Alameda County are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?

1. Right Direction
2. Wrong Track
3. (Don't Know)

4. (T) What is the most important problem facing Alameda County today? **(OPEN END, 1 response, insert precode list)**
5. (T) And what would you say is the most important transportation problem facing Alameda County today? **(OPEN END, 1 response, insert precode list)**

(BEGIN A/B SPLIT: HALF OF THE SAMPLE IN EACH REGION GETS EACH VERSION OF THE BALLOT QUESTION)

(SAMPLE A)

6. The following measure may be on the ballot next year in Alameda County:

Shall a new Alameda County Transportation Expenditure Plan be implemented to address the County's current and future transportation needs? Approval of this measure will keep all funds in Alameda County, authorizes extending the existing transportation sales tax and increasing it by 1/2 cent, with voter approval every 20 years on a new expenditure plan, with continued citizen oversight and a local jobs creation program. No money can be taken by the state.

If this measure were on the ballot today, are you likely to vote yes to approve it, or no to reject it?

(IF UNDECIDED/DON'T KNOW: Which way do you lean — toward voting "Yes" to approve, or toward voting "No" to reject?)

1. Yes, approve
2. (Lean yes)
3. No, reject
4. (Lean no)
5. (Undecided/Don't know)

(SAMPLE B)

7. The following measure may be on the ballot next year in Alameda County:

Shall a new Alameda County Transportation Expenditure Plan be implemented to address the County's current and future transportation needs? Approval of this measure will keep all funds in Alameda County, authorizes a ½ cent transportation sales tax, with voter approval every 20 years on a new expenditure plan, with citizen oversight and a local jobs creation program. No money can be taken by the state.

If this measure were on the ballot today, are you likely to vote yes to approve it, or no to reject it?

(IF UNDECIDED/DON'T KNOW: Which way do you lean — toward voting "Yes" to approve, or toward voting "No" to reject?)

1. Yes, approve
2. (Lean yes)
3. No, reject
4. (Lean no)
5. (Undecided/Don't know)

(END A/B SPLIT: RESUME ASKING ALL)

Now I'm going to read you some of the specific elements of the ballot measure. After each please tell me if you support or oppose that particular element.

(AFTER EACH ELEMENT: Do you support or oppose this element of the ballot measure?)

(IF SUPPORT/OPPOSE: Would you say you strongly support/oppose that element, or somewhat support/oppose that element?)

SCALE:

1. Strongly support	2. Somewhat support
3. Somewhat oppose	4. Strongly oppose
	5. (Don't Know)

This measure would...

(RANDOMIZE LIST)

8. Maintain and enhance mass transit programs that have a demonstrated ability to get people out of their cars, including supporting AC Transit services and the ACE Train, which runs from the Central Valley through the Pleasanton area and on to San Jose, extending BART to Livermore, and expanding express and feeder bus services.
9. Improve the County's aging highway infrastructure. The plan authorizes major new projects to improve interchanges and highway efficiencies to improve traffic flow, and improve surface streets and arterial roads that feed key commute corridors.
10. Maintain and improve local streets and roads. The current expenditure plan provides critical funds to every Alameda County city for maintenance and upkeep of local streets and roads. This new plan will continue to repave streets, fill potholes, and upgrade local transportation infrastructure.
11. Complete major bike and pedestrian routes and improve safety. The plan funds completion of trails along key commute corridors, including the East Bay Greenway, Iron Horse Trail, and Bay Trail, and makes significant road and bikeway improvements to minimize traffic disruption and maximize safety for cyclists and pedestrians
12. **(SAMPLE A)** Extend the current transportation sales tax.
13. **(SAMPLE A)** Increase the transportation sales tax by ½ cent.
14. **(SAMPLE B)** Establish a new ½ cent transportation sales tax.
15. Establish a permanent transportation sales tax for the County to guarantee long-term funding for roads, transit systems, bicycles and pedestrians, that cannot be taken by the State.
16. Ensure an independent Citizens Watchdog group audits the transportation agency and reports yearly to the public in local newspapers to insure the funds are spent as directed by the voters.
17. Allow the county to continue delivering key road and transportation improvements as they did from prior measures in 1986 and 2000, which included improving I-880, bringing BART to Pleasanton and Warm Springs, and easing traffic bottlenecks at key interchanges like I-580 and I-680, and Highways 24 and 13.

(END RANDOMIZE)

18. Given what you have heard, if the election on this ballot measure were held today, are you likely to vote yes to approve it, or no to reject it?

(IF UNDECIDED/DON'T KNOW: Which way do you lean — toward voting “Yes” to approve, or toward voting “No” to reject?)

1. Yes, approve
2. (Lean yes)
3. No, reject
4. (Lean no)
5. (Undecided/Don't know)

I'm going to read you some statements about the transportation sales tax ballot measure. After each statement, please tell me if it would make more likely to support the measure or more likely to oppose the measure, or if it makes no difference. **(IF SUPPORT/OPPOSE: Is that much more likely to support/oppose the measure, or somewhat more likely to support/oppose the measure?)**

- SCALE:**
1. Much more likely to support
 2. Somewhat more likely to support
 3. (More likely to oppose)
 4. No difference
 5. (Don't know)

AFTER EACH QUESTION: Does that make you more likely to support or oppose the measure, or does it make no difference?

(RANDOMIZE ENTIRE LIST)

Streets & Roads

19. This measure will make the carpool lane on I-880 continuous between Oakland and Fremont;
20. This measure will fund installation of new technologies on I-880 to improve traffic flow;
21. This measure will improve Route 84 between I-580 and I-680 near Livermore and Pleasanton to relieve both local and commuter traffic;
22. This measure will fund improvements to major regional roads, like Ashby Avenue in Berkeley, Broadway in Oakland, Mission Boulevard in Hayward, Union City and Fremont, and Stanley Boulevard in Pleasanton;
23. This measure will fund major improvements along the I-80 corridor, including at the on and off ramps at Gilman, University, Ashby, and Powell Streets, that make the corridor safer and less congested;
24. This measure funds major improvements that will make it easier and faster to get between I-680 and I-880 in Fremont;
25. This measure will fund major improvements along the I-680 corridor between Dublin and Fremont to make the corridor safer and less congested;
26. This measure will make the carpool lane on I-680 continuous between Dublin and Fremont;
27. This measure will fund installation of new technologies on I-680 to improve traffic flow;
28. This measure will make our streets, roads, and highways safer and more efficient;
29. This measure funds the completion of major improvements that will help traffic flow better throughout Alameda County;

Public Transit

30. This measure will restore some of the essential public transit services that have been eliminated due to state budget shortfalls;
31. This measure will provide critical funding needed to extend BART to Livermore;
32. This measure will extend commuter trains and buses over the Dumbarton Bridge to improve the commute to Silicon Valley;
33. This measure creates a Bus Rapid Transit system that can move people more quickly into and through the Oakland and Berkeley areas from other parts of the county;
34. This measure will expand express and rapid bus services;
35. This measure makes it easier to use multiple forms of transit in a single trip by creating coordinated transit centers;
36. This measure will keep public transit service affordable for those who depend on it, including seniors, youth, and people with disabilities;
37. This measure will make it easier to get to work and school using public transportation;
38. This measure will support commuter ferry services;
39. This measure ensures that seniors and people with disabilities can get where they need to go on public transit;
40. This measure will increase track capacity through the BayFair BART station, allowing BART to run trains more efficiently and improve on-time performance throughout the BART system.
41. This measure encourages transit use by the next generation by providing all elementary, middle, and high school students in the county with a free transit pass;

Bike/Ped

42. This measure will complete important bicycle and pedestrian trails in the East Bay, including commute corridors like the Bay Trail, Iron Horse Trail, and the East Bay Greenway;
43. This measure will make our streets and roads safer for pedestrians and bicyclists, including the county's 340,000 school-age children;

Goods Movement

44. This measure will make it safer and easier for trucks to get to and from the Port of Oakland without creating backups and traffic congestion;
45. This measure will reduce the pollution and traffic congestion caused by the trucks that carry goods on our streets and roads;

Air Quality/Emissions Reduction

46. This measure will improve air quality by reducing traffic congestion, promoting bicycling, walking, and public transit use, and reducing truck traffic on our roads and highways;

Economic Benefit

47. With the Federal Government in Washington unable to act and severe cuts from Sacramento, this measure will stimulate the local economy and create thousands of jobs right here in Alameda County;
48. This measure will fund multi-use development projects that include housing, restaurant, retail, and businesses, with convenient access to existing and new transportation systems and options;
49. The expenditure plan for this measure invests in every part of Alameda County, and is the result of years of outreach, collaboration, and public involvement;

(END RANDOMIZE)

(BEGIN A/B SPLIT)

(SAMPLE A)

50. Now I'd like to read you the measure again:

Shall a new Alameda County Transportation Expenditure Plan be implemented to address the County's current and future transportation needs? Approval of this measure will keep all funds in Alameda County, authorizes extending the existing transportation sales tax and increasing it by 1/2 cent, with voter approval every 20 years on a new expenditure plan, with continued citizen oversight and a local jobs creation program. No money can be taken by the state.

Given all you have just heard, if this measure were on the ballot today, are you likely to vote yes to approve it, or no to reject it?

(IF UNDECIDED/DON'T KNOW: Which way do you lean — toward voting "Yes" to approve, or toward voting "No" to reject?)

1. Yes, approve
 2. (Lean yes)
 3. No, reject
 4. (Lean no)
 5. (Undecided/Don't know)
51. And what if the measure was for ¼ cent, instead of ½ cent? If this measure were on the ballot today for ¼ cent, are you likely to vote yes to approve it, or no to reject it?
- (IF UNDECIDED/DON'T KNOW: Which way do you lean — toward voting "Yes" to approve, or toward voting "No" to reject?)**
1. Yes, approve
 2. (Lean yes)
 3. No, reject
 4. (Lean no)
 5. (Undecided/Don't know)

(SAMPLE B)

52. Now I'd like to read you the measure again:

Shall a new Alameda County Transportation Expenditure Plan be implemented to address the County's current and future transportation needs? Approval of this measure will keep all funds in Alameda County, authorizes a ½ cent transportation sales tax, with voter approval every 20 years on a new expenditure plan, with citizen oversight and a local jobs creation program. No money can be taken by the state.

Given all you have just heard, if this measure were on the ballot today, are you likely to vote yes to approve it, or no to reject it?

(IF UNDECIDED/DON'T KNOW: Which way do you lean — toward voting "Yes" to approve, or toward voting "No" to reject?)

1. Yes, approve
2. (Lean yes)
3. No, reject
4. (Lean no)
5. (Undecided/Don't know)

53. And what if the measure was for ¼ cent, instead of ½ cent? If this measure were on the ballot today for ¼ cent, are you likely to vote yes to approve it, or no to reject it?

(IF UNDECIDED/DON'T KNOW: Which way do you lean — toward voting "Yes" to approve, or toward voting "No" to reject?)

1. Yes, approve
2. (Lean yes)
3. No, reject
4. (Lean no)
5. (Undecided/Don't know)

(END A/B SPLIT: RESUME ASKING ALL)

54. Some people say now is not the time to raise our taxes, but that we should try to secure long-term local funding for transportation, since the State and Federal Governments are not reliable sources of transportation money. If Alameda County proposed only extending the current ½ cent transportation sales tax with no increase to provide long-term funding for a basic set of transportation projects and programs, would you be likely to vote yes to approve it, or no to reject it?

(IF UNDECIDED/DON'T KNOW: Which way do you lean — toward voting "Yes" to approve, or toward voting "No" to reject?)

1. Yes, approve
2. (Lean yes)
3. No, reject
4. (Lean no)
5. (Undecided/Don't know)

Now I'd like to ask you a few questions for statistical purposes only.

55. In terms of your job status, are you employed, unemployed but looking for work, retired, a student, or a homemaker?
1. Employed
 2. Unemployed
 3. Retired
 4. Student
 5. Homemaker
 6. (Other)
 7. (Don't know)
56. Do you rent or own your home or apartment?
1. Rent/other
 2. Own/buying
 3. (Don't know/Refused)
57. Thinking about a political scale where 1 is very liberal and 7 is very conservative, where would you place yourself on that scale? **(Code 1-7, 8=Don't know)**
58. What is the last grade you completed in school?
1. Some grade school
 2. Some high school
 3. Graduated high school
 4. Technical/Vocational
 5. Some college
 6. Graduated college [including Bachelors, BA]
 7. Graduate/Professional [including Masters, PhD, etc]
 8. (Don't know/Refused)
59. Would you consider yourself to be Hispanic or Latino, Black or African American, White, Asian or Pacific Islander, or something else?
1. Hispanic/Latino
 2. Black/African-American
 3. White
 4. Asian or Pacific Islander
 5. (Bi-racial/ Multi-racial)
 6. Something else/ other
 7. (Refused)

60. In what year were you born? **(Do not read categories, code as appropriate)**

1. 1936 or earlier (75+)
2. 1937-1941 (70-74)
3. 1942-1946 (65-69)
4. 1947-1951 (60-64)
5. 1952-1956 (55-59)
6. 1957-1961 (50-54)
7. 1962-1966 (45-49)
8. 1967-1971 (40-44)
9. 1972-1976 (35-39)
10. 1977-1981 (30-34)
11. 1982-1986 (25-29)
12. 1987-1993 (18-24)
13. (Refused)

THANK YOU!

PARTY REGISTRATION FROM SAMPLE

Democrat
Republican
Other
DTS

CITY CODE FROM SAMPLE

Alameda
Albany
Berkeley
Dublin
Emeryville
Fremont
Hayward
Livermore
Newark
Oakland
Piedmont
Pleasanton
San Leandro
Union City
Other/Unincorporated

ZIP CODE FROM SAMPLE

CITY FROM SAMPLE

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MEMORANDUM

from **Joan Chaplick and Carolyn Verheyen, MIG**

re **Proposed CWTP/TEP Community Outreach Approach and Strategy: Fall 2011**

date **9/2/11**

OVERVIEW

This memorandum describes the proposed outreach approach and strategy for the second round of community outreach for the Alameda Countywide Transportation Plan (CWTP) and Transportation Expenditure Plan (TEP), which was approved by the Steering Committee on July 28, 2011. Actual dates of the meetings will be provided to CAWG, TAWG, and the Steering Committee members once finalized.

The purpose of these outreach activities is to:

- Remind participants of the purpose of the CWTP and its relationship to the Transportation Expenditure Plan (TEP)
- Present the draft CWTP for review and comment; and
- Present preliminary TEP project, program and financial information.

Based on experience developed during the first round of outreach on the CWTP, conducted January through March 2011, the outreach team recommends that a suite of materials be developed for use in three main outreach strategies – Community Workshops, Web-based Outreach and an Outreach Toolkit. This will ensure clear and consistent messaging in multiple mediums. It will also enable the outreach team to collect comments on the draft CWTP through a variety of methods, allowing for more comprehensive data analysis.

This overarching strategy also responds to the lessons learned from the initial round of outreach done in the spring of 2011, as documented in the Summary of Public Participation Findings. In implementing these strategies, there will be an increase in coordination with stakeholder groups, with targeted outreach to Asian and Latino populations in order to achieve a level of participation representative of county demographics. There will also be an emphasis on increasing participation of residents in the central and southern planning areas of the county.

OUTREACH MATERIALS

MIG, along with Alameda CTC staff, will assemble a suite of materials that will educate the public on the key elements of the draft CWTP and enable the Alameda CTC to collect comments and feedback on the draft CWTP. These materials will also aid in explaining the TEP development process, the preliminary projects, programs and financial information and how it integrates with the CWTP process. These materials will be flexible enough to be incorporated in a number of outreach strategies, such as Community Workshops and online efforts.

The materials will include:

- An Executive Summary or Summary of Key Sections from the draft CWTP, and preliminary TEP information
- A Fact Sheet explaining the CWTP/TEP process
- A Questionnaire in hard copy and web-based formats

OUTREACH STRATEGIES

1. Community Workshops (5)

Alameda CTC will host one two-hour workshop in each of the five supervisorial districts. The workshops will be held on weekday evenings, Monday through Thursday, during the months of October and early November. The outreach team will begin scheduling the workshops, and if available, host them in the same ADA and transit-accessible venues used in the first round of workshops. These potential venues include:

- Oakland City Hall
- Fremont Public Library
- Hayward City Hall
- San Leandro Library
- Dublin Public Library

Those participants who shared their email contact information during the first round of workshops will be invited via email to attend the second round of workshops. MIG will utilize existing media contacts to publicize the community workshops. MIG will also coordinate with Alameda CTC staff and advisory committee members to advertise the workshops through existing communication channels such as the Alameda CTC website, newsletters and email announcements.

The following list identifies workshop outreach methods and materials:

Workshop Outreach Method

E-Mail Announcement
Public Service Announcements
Press Release
Website Announcement
Newspaper advertisements

Workshop Materials

Agenda
Draft CWTP and preliminary TEP materials
PowerPoint Presentation
Display Boards
Workshop Handouts (CWTP Executive Summary, CWTP-TEP Process Graphic, TEP preliminary materials)
Comment Form (to include additional demographic information questions such as which planning area of the county participants live and/or work)

The E-mail announcement will do the following:

- Encourage community members to attend a workshop;
- Encourage community members to take the online web questionnaire;
- Offer to translate project materials, including the fact sheet and questionnaire, into requested languages for community members; and
- Offer to meet in-person to make a presentation on the plan and participate in a discussion with existing community groups at their regularly scheduled meetings.

2. Web-based Outreach

Website Updates

Using information taken from the suite of materials, MIG will update the Alameda CTC website appropriately. As a major communication tool, the web will be used to advertise the public meetings, as well as provide a link to an online survey where members of the public can share their opinions on the draft CWTP and preliminary TEP information.

Online Questionnaire

Using the questionnaire developed as part of the suite of materials, MIG will implement an online survey which will be hosted on the Alameda CTC website. Within this survey MIG will collect important demographic information, including which County planning area (North, Central, East or South) the participant lives and works in. The online questionnaire will also inquire as to the level of review of the draft CWTP survey participants were able to complete before commenting.

Email Blasts

Email will be an important method for both educating the public on the CWTP-TEP process and inviting them to share their opinions regarding the draft CWTP and preliminary TEP information. Emails will be used to:

- Inform members of the public about the release of the draft CWTP and preliminary TEP information;
- Direct members of the public to the online questionnaire;
- Invite members of the public to attend Community Workshops; and
- Offer opportunities for an on-site meeting to be conducted with local groups using the outreach toolkit.

3. Outreach Toolkit

During the first round of outreach, MIG developed an outreach toolkit, which was used by CAWG, TAWG, CAC, PAPCO, CWC and Commission members and other trained Alameda CTC and consultant team staff. Using the toolkit, staff and advisory group members were able to inform and receive comment from 724 community members. The outreach team recommends these relationships be strengthened with a second round of outreach efforts based on the toolkit concept.

The outreach toolkit will also be used for more concentrated outreach to under-served communities that were not fully represented in the first round of outreach.

The toolkit can also be used for a meeting in a culturally-appropriate location if requested by a community group or organization. The outreach tool will be used to help promote the five community workshops, so anyone seeking a more in-depth participation opportunity is encouraged to attend.

The outreach toolkit is anticipated to include the following:

1. Moderator Guide
2. Fact Sheet
3. Participant Questionnaire
4. Outreach Recording Template
5. Self-Addressed Stamped Envelope (SASE)

MIG will provide a second round of training to Advisory Committee members in order to familiarize them with the updated toolkit and methods for getting input on the draft plan.

TITLE VI COMPLIANCE

MIG has compiled a broad stakeholder list that identifies a variety of groups representing the ethnic and cultural diversity of Alameda County. Groups will be contacted by email with an announcement that will:

- Encourage community members to attend one of the five conveniently located workshops;
- Encourage community members to take the online web questionnaire;
- Offer to translate project materials, including the fact sheet and questionnaire into requested languages for community members; and
- Offer to meet in-person to make a presentation on the plan and participate in a discussion with existing community groups at their regularly scheduled meetings.

The Questionnaire and workshop handouts will be translated into Spanish and Mandarin, and will be available in additional languages upon request.

The outreach team will monitor the results of the toolkit to track demographic representation in the process. Should gaps in participation be identified, the outreach team will directly contact groups and organizations that represent the needed communities.

DOCUMENTATION AND PRESENTATION

MIG will fully document the results of these methods and prepare a summary report and comments database similar to that prepared for the first round of outreach. Staff and consultants will present these results at meetings of the Steering Committee, CAWG and TAWG in the late fall.

MEMORANDUM

to **Tess Lengyel, Beth Walukas and Diane Stark, Alameda CTC**

from **Carolyn Verheyen and Joan Chaplick, MIG**

re **Status Update on CWTP/TEP Community Outreach Workshop Schedule: Fall 2011**

date **9/14/2011**

This memorandum provides a status update on the community workshop venues and dates confirmed for the Alameda Countywide Transportation Plan (CWTP) and Transportation Expenditure Plan (TEP) outreach effort in Fall 2011. The dates and venues confirmed thus far are as follows:

Tuesday, October 18, 2011

6:30 – 8:30pm

District 5/North Planning Area
South Berkeley Senior Center
Multipurpose Room
2939 Ellis Street, Berkeley

Monday, October 24, 2011

6:30 – 8:30pm

District 4/North Planning Area
East Oakland Senior Center
Multipurpose Room
9255 Edes Avenue, Oakland

Thursday, October 27, 2011

6:30 – 8:30pm

District 2/South Planning Area
Union City Sports Center
Classroom
31224 Union City Boulevard, Union City

Wednesday, November 2, 2011

6:30 – 8:30pm

District 1/East Planning Area
Dublin Civic Center Library
Community Room
200 Civic Plaza, Dublin

All spaces are booked from 5:30 – 9:00 pm, with the workshops planned for 6:30 – 8:30 pm.

A date and venue for the District 3/Central Planning Area meeting in San Leandro is yet to be confirmed.

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Memorandum

DATE: September 15, 2011

TO: CWTP-TEP Steering Committee

FROM: Beth Walukas, Deputy Director of Planning
Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation

SUBJECT: **Review of Sustainable Community Strategy (SCS)/Regional Transportation Plan (RTP) and Countywide Transportation Plan (CWTP)/ Transportation Expenditure Plan Information**

Recommendation

This item is for information only. No action is requested.

Summary

This item provides information on regional and countywide transportation planning efforts related to the updates of the Countywide Transportation Plan and Sales Tax Transportation Expenditure Plan (CWTP-TEP) as well as the Regional Transportation Plan (RTP) and the development of the Sustainable Community Strategy (SCS).

Discussion

Ten separate committees receive monthly updates on the progress of the CWTP-TEP and RTP/SCS, including ACTAC, the Planning, Policy and Legislation Committee (PPLC), the Alameda CTC Board, the CWTP-TEP Steering Committee, the Citizen's Watchdog Committee, the Paratransit Advisory and Planning Committee, the Citizen's Advisory Committee, and the Bicycle and Pedestrian Advisory Committee, and the Technical and Community Advisory Working Groups. The purpose of this report is to keep various Committee and Working Groups updated on regional and countywide planning activities, alert Committee members about issues and opportunities requiring input in the near term, and provide an opportunity for Committee feedback in a timely manner. CWTP-TEP Committee agendas and related documents are available on the Alameda CTC website. RTP/SCS related documents are available at www.onebayarea.org.

August and September 2011 Update:

This report focuses on the months of August and September 2011. A summary of countywide and regional planning activities for the next three months is found in Attachment A and a three year schedule for the countywide and the regional processes is found in Attachments B and C, respectively. Highlights include the release of the One Bay Area Alternative Land Use Scenarios and the development of the two transportation networks to support those scenarios by ABAG and MTC and the release of the first draft of the Alameda Countywide Transportation Plan, preliminary TEP

projects and program packaging parameters, and fall 2011 outreach process and polling questions by the CWTP-TEP Steering Committee, CAWG and TAWG.

1) MTC/ABAG: Development of Alternative Land Use and Transportation Scenarios

On August 26, 2011, ABAG released the One Bay Area SCS Alternative Land Use Scenarios: Core Concentration, Focused Growth, and Outer Bay Area Growth. In July, ABAG's Executive Board and the MTC Commission approved five alternative scenarios to be used to inform the development of the Preferred SCS. Two of the scenarios are based on unconstrained growth, assume very strong employment growth, and unconstrained funding to support housing affordability. The Alternative Land Use Scenario Report presents the land use patterns for three scenarios: Core Concentration, Focused Growth, and Outer Bay Area Growth and assesses them based on economic growth, financial feasibility and reasonable planning strategies.

Concurrently, MTC has been working with the stakeholders to develop two transportation networks: Transportation 2035 and Core Capacity Transit networks. Two meetings were held in August to present the land use and transportation information. MTC staff will begin its scenario analysis and project performance assessment in September with results anticipated to be released in October.

2) CWTP-TEP

The first draft of the Countywide Transportation Plan is being released in September along with financially constrained project and program scenarios for discussion at the CAWG, TAWG and Steering Committee meetings. This information can be found on the website and will be brought to the advisory groups, Committees and Commission in October and November for input. The CWTP-TEP Steering Committee is anticipated to approve the Transportation Expenditure Plan strategic parameters. Based on the approved parameters, a preliminary package of Transportation Expenditure Plan projects and programs will be developed with input from the Committee and Advisory Groups. Public outreach on the CWTP and TEP will occur in October. Dates are still being finalized, and will be presented as soon as they are available.

3) Upcoming Meetings Related to Countywide and Regional Planning Efforts:

Committee	Regular Meeting Date and Time	Next Meeting
CWTP-TEP Steering Committee	Typically the 4 th Thursday of the month, noon Location: TBD	September 22, 2011 October 27, 2011 November 17, 2011 December 1, 2011
CWTP-TEP Technical Advisory Working Group	2 nd Thursday of the month, 1:30 p.m. Location: Alameda CTC	September 8, 2011 October 13, 2011 November 10, 2011
CWTP-TEP Community Advisory Working Group	Typically the 1 st Thursday of the month, 2:30 p.m. Location: Alameda CTC	September 15, 2011 October 6, 2011 November 3, 2011
Joint Steering Committee and Community Advisory Working Group	Noon Location: Alameda CTC offices	October 7, 2011
SCS/RTP Regional Advisory Working Group	1 st Tuesday of the month, 9:30 a.m. Location: MetroCenter, Oakland	September 6, 2011 October 4, 2011

Committee	Regular Meeting Date and Time	Next Meeting
SCS/RTP Equity Working Group	2 nd Wednesday of the month, 11:15 a.m. Location: MetroCenter, Oakland	September 14, 2011 October 12, 2011
SCS Housing Methodology Committee	10 a.m. Location: BCDC, 50 California St., 26 th Floor, San Francisco	October 20, 2011
Northern Alameda County SCS Summit Hosted by Supervisor Keith Carson	1 p.m. Location: Alameda County Administration Offices 1221 Oak Street, 5 th Floor, Oakland	October 12, 2011
5 CWTP-TEP Public Outreach Meetings	Time, Dates, and Location TBD	October
North County Transportation Forum	6:00 p.m. Alameda CTC offices	October 20, 2011

Fiscal Impact

None.

Attachments

Attachment A: Summary of Next Quarter Countywide and Regional Planning Activities
Attachment B: CWTP-TEP-RTP-SCS Development Implementation Schedule
Attachment C: OneBayArea SCS Planning Process

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Summary of Next Quarter Countywide and Regional Planning Activities (September through December)

Countywide Planning Efforts (CWTP-TEP)

The three year CWTP-TEP schedule showing countywide and regional planning milestone schedules is found in Attachment B. Major milestone dates are presented at the end of this memo. During the September through December time period, the CWTP-TEP Committees will be focusing on:

- Coordinating with ABAG and local jurisdictions to provide comments on the Alternative Land Use Scenarios for the Sustainable Communities Strategy (SCS);
- Coordinating with the local jurisdiction to develop a draft Alameda County Locally Preferred SCS to test with the financially constrained transportation network in October;
- Responding to comments on the CWTP Evaluation Report;
- Identifying a financially constrained list of projects and programs for the CWTP;
- Releasing the first draft of the CWTP (September) and developing the second draft (December);
- Developing countywide 25-year revenue projections and opportunities that are consistent and concurrent with MTC's 25-year revenue projections;
- Approving Transportation Expenditure Plan strategic parameters (September) and developing first draft Transportation Expenditure Plan list of projects and programs (December);
- Conducting public outreach and a second poll (October)

Regional Planning Efforts (RTP-SCS)

Staff continues to coordinate the CWTP-TEP with planning efforts at the regional level including the Regional Transportation Plan (MTC), the Sustainable Communities Strategy (ABAG), Climate Change Bay Plan and amendments (San Francisco Bay Conservation and Development Commission (BCDC)) and CEQA Guidelines (Bay Area Air Quality Management District (BAAQMD)).

In the three month period for which this report covers, MTC and ABAG are focusing on

- Conducting a scenario analysis of five land use options (Alternative Land Use Scenarios released by ABAG on August 26, 2011) and two transportation network options (committed projects and first draft uncommitted projects released by MTC on August 31, 2011);
- Releasing the results of the scenario analysis and project performance assessment (October);
- Refining draft 25-year revenue projections; and
- Adopting a RHNA Methodology.

Staff will be coordinating with the regional agencies and providing feedback on these issues, through:

- Participating on the MTC/ABAG Regional Advisory Working Group (RAWG),
- Participating on regional Sub-committees (Equity sub-committee); and
- Assisting in public outreach.

Key Dates and Opportunities for Input

The key dates shown below are indications of where input and comment are desired. The major activities and dates are highlighted below by activity:

Sustainable Communities Strategy:

Presentation of SCS information to local jurisdictions: Completed
Initial Vision Scenario Released: March 11, 2011: Completed
Draft Alternative Land Use Scenarios Released: Completed (released August 26, 2011)
Preferred SCS Scenario Released/Approved: February 2012

RHNA

RHNA Process Begins: January 2011
Draft RHNA Methodology Released: September 2011
Draft RHNA Plan released: February 2012
Final RHNA Plan released/Adopted: July 2012/October 2012

RTP

Develop Financial Forecasts and Committed Funding Policy: Completed
Call for RTP Transportation Projects: Completed
Conduct Performance Assessment: May 2011 - October 2011
Transportation Policy Investment Dialogue: October 2011 – February 2012
Prepare SCS/RTP Plan: April 2012 – October 2012
Draft RTP/SCS for Released: November 2012
Prepare EIR: December 2012 – March 2013
Adopt SCS/RTP: April 2013

CWTP-TEP

Develop Alameda County Locally Preferred SCS Scenario: May – December 2011
Call for Projects: Completed
Plans Outreach: January 2011 - December 2011
Draft List of CWTP constrained Projects and Programs: September 2011
First Draft CWTP: September 2011
Preliminary TEP Program and Project list: September 2011
Draft CWTP and TEP Released: January 2012
Outreach: January 2012 – June 2012
Adopt CWTP and TEP: May 2012
TEP Submitted for Ballot: August 2012

	2010						Meeting	2010				
Task	January	February	March	April	May	June	July	August	Sept	Oct	Nov	Dec
Alameda CTC Committee/Public Process												
Steering Committee			Establish Steering Committee	Working meeting to establish roles/ responsibilities, community working group	RFP feedback, tech working group	Update on Transportation/ Finance Issues	Approval of Community working group and steering committee next steps	No Meetings		Feedback from Tech, comm working groups	No Meetings	Expand vision and goals for County ?
Technical Advisory Working Group								No Meetings		Roles, resp, schedule, vision discussion/ feedback	No Meetings	Education: Trans statistics, issues, financials overview
Community Advisory Working Group								No Meetings		Roles, resp, schedule, vision discussion/ feedback	No Meetings	Education: Transportation statistics, issues, financials overview
Public Participation								No Meetings			Stakeholder outreach	
Agency Public Education and Outreach	Information about upcoming CWTP Update and reauthorization											
Alameda CTC Technical Work												
Technical Studies/RFP/Work timelines: All this work will be done in relation to SCS work at the regional level						Board authorization for release of RFPs	Pre-Bid meetings	Proposals reviewed	ALF/ALC approves shortlist and interview; Board approves top ranked, auth. to negotiate or NTP	Technical Work		
Polling												
Sustainable Communities Strategy/Regional Transportation Plan												
Regional Sustainable Community Strategy Development Process - Final RTP in April 2013			Local Land Use Update P2009 begins & PDA Assessment begins						Green House Gas Target approved by CARB.	Start Vision Scenario Discussions		
											Adopt methodology for Jobs/Housing Forecast (Statutory Target)	Projections 2011 Base Case
												Adopt Voluntary Performance Targets

Countywide Transportation Plan and Transportation Expenditure Plan
Preliminary Development Implementation Schedule - Updated 6/27/11

		2011					FY2011-2012	2011					
Task		January	February	March	April	May	June	July	August	Sept	Oct	Nov	Dec
Alameda CTC Committee/Public Process													
Steering Committee	Adopt vision and goals; begin discussion on performance measures, key needs	Performance measures, costs guidelines, call for projects and prioritization process, approve polling questions, initial vision scenario discussion	Review workshop outcomes, transportation issue papers, programs, finalize performance measures, land use discussion, call for projects update	Outreach and call for projects update (draft list approval), project and program packaging, county land use	Outreach update, project and program screening outcomes, call for projects final list to MTC, TEP strategic parameters, land use, financials, committed projects	No Meetings.		Project evaluation outcomes; outline of CWTP; TEP Strategies for project and program selection	No Meetings	1st Draft CWTP, TEP potential project and program packages, outreach and polling discussion		Meeting moved to December due to holiday conflict	Review 2nd draft CWTP; 1st draft TEP
Technical Advisory Working Group	Comment on vision and goals; begin discussion on performance measures, key needs	Continue discussion on performance measures, costs guidelines, call for projects, briefing book, outreach	Review workshop outcomes, transportation issue papers, programs, finalize performance measures, land use discussion, call for projects update	Outreach and call for projects update, project and program packaging, county land use	Outreach update, project and program screening outcomes, call for projects update, TEP strategic parameters, land use, financials, committed projects	No Meetings.		Project evaluation outcomes; outline of CWTP; TEP Strategies for project and program selection	No Meetings	1st Draft CWTP, TEP potential project and program packages, outreach and polling discussion		Review 2nd draft CWTP, 1st draft TEP, poll results update	No Meetings
Community Advisory Working Group	Comment on vision and goals; begin discussion on performance measures, key needs	Continue discussion on performance measures, costs guidelines, call for projects, briefing book, outreach	Review workshop outcomes, transportation issue papers, programs, finalize performance measures, land use discussion, call for projects update	Outreach and call for projects update, project and program packaging, county land use	Outreach update, project and program screening outcomes, call for projects update, TEP strategic parameters, land use, financials, committed projects	No Meetings.		Project evaluation outcomes; outline of CWTP; TEP Strategies for project and program selection	No Meetings	1st Draft CWTP, TEP potential project and program packages, outreach and polling discussion		Review 2nd draft CWTP, 1st draft TEP, poll results update	No Meetings
Public Participation	Public Workshops in two areas of County: vision and needs; Central County Transportation Forum	Public Workshops in all areas of County: vision and needs		East County Transportation Forum				South County Transportation Forum	No Meetings		2nd round of public workshops in County: feedback on CWTP,TEP; North County Transportation Forum		No Meetings
Agency Public Education and Outreach		Ongoing Education and Outreach through November 2012						Ongoing Education and Outreach through November 2012					
Alameda CTC Technical Work													
Technical Studies/RFP/Work timelines: All this work will be done in relation to SCS work at the regional level		Feedback on Technical Work, Modified Vision, Preliminary projects lists					Work with feedback on CWTP and financial scenarios	Technical work refinement and development of Expenditure plan, 2nd draft CWTP					
Polling	Conduct baseline poll										Polling on possible Expenditure Plan projects & programs	Polling on possible Expenditure Plan projects & programs	
Sustainable Communities Strategy/Regional Transportation Plan													
Regional Sustainable Community Strategy Development Process - Final RTP in April 2013			Release Initial Vision Scenario	Detailed SCS Scenario Development				Release Detailed SCS Scenarios	Technical Analysis of SCS Scenarios; Adoption of Regional Housing Needs Allocation Methodology		SCS Scenario Results/and funding discussions		Release Preferred SCS Scenario
	Discuss Call for Projects		Call for Transportation Projects and Project Performance Assessment			Project Evaluation		Draft Regional Housing Needs Allocation Methodoligy					
	Develop Draft 25-year Transportation Financial Forecasts and Committed Transportation Funding Policy												

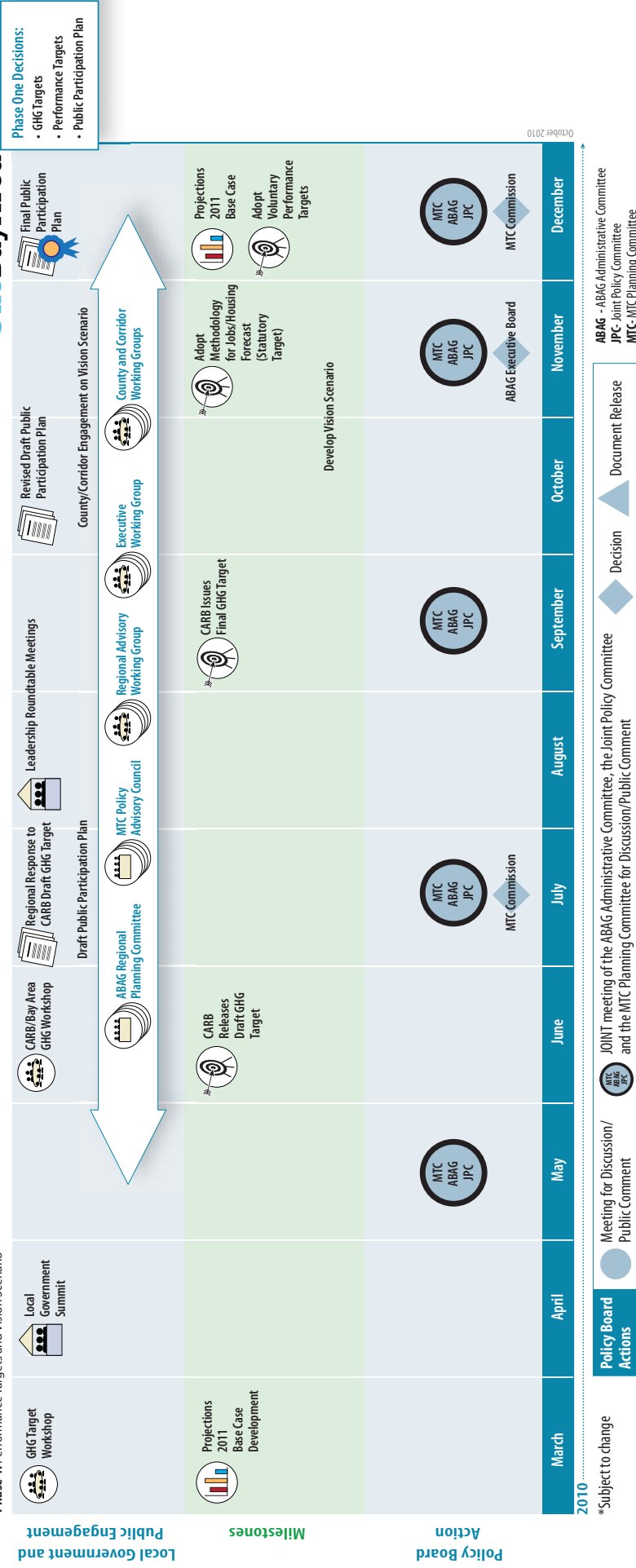
		2012					FY2011-2012				
Task	January	February	March	April	May	June	July	August	Sept	Oct	November
Alameda CTC Committee/Public Process											
Steering Committee	Full Draft TEP, Outcomes of outreach meetings	Finalize Plans	Meetings to be determined as needed	Adopt Draft Plans	Adopt Final Plans	Expenditure Plan on Ballot					VOTE: November 6, 2012
Technical Advisory Working Group	Full Draft TEP, Outcomes of outreach meetings	Finalize Plans	Meetings to be determined as needed								VOTE: November 6, 2012
Community Advisory Working Group	Full Draft TEP, Outcomes of outreach meetings	Finalize Plans	Meetings to be determined as needed								VOTE: November 6, 2012
Public Participation			Expenditure Plan City Council/BOS Adoption								VOTE: November 6, 2012
Agency Public Education and Outreach	Ongoing Education and Outreach Through November 2012 on this process and final plans						Ongoing Education and Outreach through November 2012 on this process and final plans				
Alameda CTC Technical Work											
Technical Studies/RFP/Work timelines: All this work will be done in relation to SCS work at the regional level	Finalize Plans										
Polling					Potential Go/No Go Poll for Expenditure Plan						
Sustainable Communities Strategy/Regional Transportation Plan											
Regional Sustainable Community Strategy Development Process - Final RTP in April 2013	Approval of Preferred SCS, Release of Regional Housing Needs Allocation Plan		Begin RTP Technical Analysis & Document Preparation	Prepare SCS/RTP Plan						Release Draft SCS/RTP for review	

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Sustainable Communities Strategy Planning Process: Phase 1 Detail for 2010*

Phase 1: Performance Targets and Vision Scenario

OneBayArea



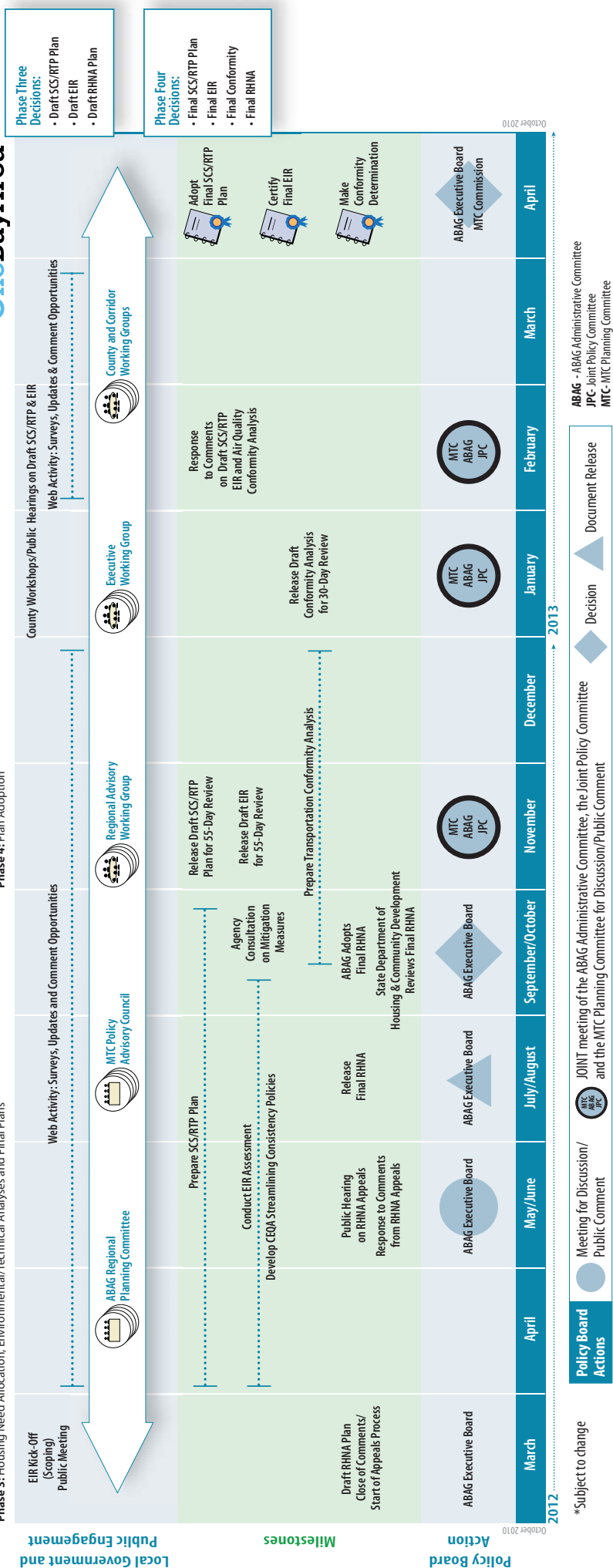
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Phase 4: Plan Adoption

Phase 3: Housing Need Allocation, Environmental/Technical Analyses and Final Plans



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Upcoming Advisory and Steering Committee Meetings Schedule

ALL MEETINGS at Alameda CTC, 1333 Broadway, Suite 300, Oakland, CA

	Meeting Date/Function	Outcomes	Agenda Items
1	<p>CAWG February 3, 2011 2:30 p.m. – 5 p.m.</p> <p>TAWG February 10, 2011 1:30 – 4 p.m.</p> <p>Steering Committee February 24, 2011 12 – 2 p.m.</p>	<ul style="list-style-type: none"> Receive an update on Regional and Countywide Transportation Plan and Transportation Expenditure Plan (CWTP-TEP) activities and processes Receive overview and schedule of Initial Vision Scenario Review the Metropolitan Transportation Commission (MTC) draft policy on committed funding and projects and call for projects Receive an outreach status update and approve the polling questions Discuss performance measures 	<ul style="list-style-type: none"> Update on CWTP-TEP Activities Since Last Meeting Update on Countywide and Regional Processes Discuss the initial vision scenario and approach for incorporating SCS in the CWTP Review and comment on MTC's Draft Policy on Committed Funding and Projects, Approve Alameda CTC Call for Projects process and approve prioritization policy Outreach status update and <i>Steering Committee approval of polling questions</i> Continued discussion and refinement of Performance Measures Update: Steering Committee, CAWG, TAWG, and Other Items/Next Steps
2	<p>CAWG March 3, 2011 2:30 p.m. – 5 p.m.</p> <p>TAWG March 10, 2011 1:30 – 4 p.m.</p> <p>Special TAWG March 18, 2011 11:30 a.m. to 1:30 p.m.</p> <p>Steering Committee March 24, 2011 11 a.m. – 1 p.m.</p>	<ul style="list-style-type: none"> Receive an update on outreach Adopt Final Performance Measures Initiate discussion of programs Receive update on MTC Call for Projects and Alameda County approach Comment on transportation issue papers subjects Provide input to land use and modeling and Initial Vision Scenario (TAWG) Update on Initial Vision Scenario and Priority Conservation Areas (TAWG) Receive update and finalize Briefing Book Discuss committed funding policy 	<ul style="list-style-type: none"> Update on Outreach: Workshop, Polling Update, Web Survey <i>Approve Final Performance Measures & link to RTP</i> Discussion of Programs Overview of MTC Call for Projects and Alameda County Process Discussion of Transportation Issue Papers & Best Practices Presentation Discussion of Land use scenarios and modeling processes (TAWG) Update on regional processes: Initial Vision Scenario and Priority Conservation Areas (ABAG to present at TAWG) Finalize Briefing Book TAWG/CAWG/SC update
3	<p>CAWG April 7, 2011 2:30 p.m. – 5 p.m.</p>	<ul style="list-style-type: none"> Receive update on outreach activities Provide feedback on policy for projects and programs packaging Provide comments on Alameda County land use scenarios 	<ul style="list-style-type: none"> Update on Workshop, Poll Results Presentation, Web Survey Discuss Packaging of Projects and Program for CWTP Discussion of Alameda County land use scenarios

	Meeting Date/Function	Outcomes	Agenda Items
	<p>TAWG April 14, 2011 1:30 – 4 p.m.</p> <p>Steering Committee April 28, 2011 12 – 2 p.m.</p>	<ul style="list-style-type: none"> • Receive update on Call for Projects outcomes • Comment on refined Transportation Issue Papers • Comment on committed projects and funding policy and Initial Vision Scenario 	<ul style="list-style-type: none"> • Discuss Call for Projects results: <i>Draft project list to be approved by SC to send to MTC</i> • Transportation Issue Papers & Best Practices Presentation • Update on regional process: discussion of policy on committed projects, refinement of Initial Vision Scenario • TAWG/CAWG/SC update
4	<p>CAWG May 5, 2011 2:30 p.m. – 5 p.m.</p> <p>TAWG May 12, 2011 1:30 – 4 p.m.</p> <p>Steering Committee May 26, 2011 12 – 2 p.m.</p>	<ul style="list-style-type: none"> • Review outcomes of initial workshops and other outreach • Review outcomes of call for projects, initial screening and next steps • Discuss TEP Strategic Parameters & alternative funding scenarios • Recommend land use scenario for CWTP and provide additional comments on Initial Vision Scenario • Receive information on Financial projections and opportunities • Title VI update and it's relation to final plans to CAWG & TAWG meetings 	<ul style="list-style-type: none"> • Summary of workshop results in relation to poll results • Outcomes of project call and project screening- Present screened list of projects and programs. <i>Steering Committee recommends final project and program list to full Alameda CTC commission to approve and submit to MTC after public hearing on same day.</i> • Discussion of Financials for CWTP and TEP and TEP Strategic Parameters - duration, potential funding amounts, selection process • Update on regional processes: Focus on Financial Projections, Initial Vision Scenario: <i>Steering Committee recommendation to ABAG on land use (for both a refined IVS and other potential aggressive options)</i> • Title VI update • TAWG/CAWG/SC update
	No June Meeting		
5	<p>CAWG July 7, 2011 12:00 – 5 p.m.</p> <p>TAWG July 14, 2011 1:30 – 4 p.m.</p> <p>CAWG/TAWG Joint July 21, 2011 1 – 3:30 p.m.</p> <p>Steering Committee July 28, 2011 12 – 2 p.m.</p>	<ul style="list-style-type: none"> • Project Evaluation 101 (CAWG only; 12 -1 p.m.) • Provide comments on outcomes of project evaluation • Comment on outline of Countywide Transportation Plan. • Continue discussion of TEP parameters and financials • Provide feedback on proposed outreach approach for fall 2011 	<ul style="list-style-type: none"> • Results of Project and Program Packaging and Evaluation • Review CWTP Outline • Discussion of TEP strategic parameters and financials • Discussion of fall 2011 outreach approach • Update on regional processes • TAWG/CAWG/SC update

	Meeting Date/Function	Outcomes	Agenda Items
6	<p>CAWG September 15, 2011 1 – 5 p.m.</p> <p>TAWG September 8, 2011 1:30 – 4 p.m.</p> <p>Steering Committee September 22, 2011 12 – 2 p.m.</p>	<ul style="list-style-type: none"> • Comment on first draft of Countywide Transportation Plan • Comment on potential packages of projects and programs for TEP • Prepare for second round of public meetings and second poll 	<ul style="list-style-type: none"> • Presentation/Discussion of Countywide Plan Draft • Presentation/Discussion of TEP candidate projects • Refine the process for further evaluation of TEP projects • Discussion of upcoming outreach and polling questions • Update on regional processes • TAWG/CAWG/SC update
7	<p>CAWG October 6, 2011 2:30 – 4:30 p.m.</p> <p>Joint Steering Committee/CAWG October 7, 2011 Noon to 2 p.m.</p> <p>TAWG October 13, 2011 1:30 to 3:30</p> <p>Steering Committee October 27, 2011 Noon to 3 p.m.</p>	<ul style="list-style-type: none"> • Comment on first draft of Countywide Transportation Plan, including project and program financially constrained list • Comment on preliminary Transportation Expenditure Plan candidate projects and programs • Receive update on second round of public meetings and second poll 	<ul style="list-style-type: none"> • Further refine Countywide Transportation Plan financially constrained list • Discussion of Transportation Expenditure Plan preliminary projects and programs lists • Update on public outreach and poll • Update on region processes • TAWG/CAWG/SC Update
8	<p>CAWG November 3, 2011 2:30 p.m. – 5 p.m.</p> <p>TAWG November 10, 2011 1:30 – 4 p.m.</p> <p>Steering Committee November 17, 2011 12 – 3 p.m.</p>	<ul style="list-style-type: none"> • Comment on second draft of Countywide Transportation Plan • Review and provide input on first draft of Transportation Expenditure Plan Projects and Programs • Review results of second poll and outreach update 	<ul style="list-style-type: none"> • Presentation/Discussion of Countywide Plan second draft • Presentation/Discussion of TEP Projects and Programs (first draft of the TEP) • Presentation on second poll results and outreach update • Update on regional processes • TAWG/CAWG/SC update
9	Steering Committee December 1, 2011 12 – 2 p.m.	<ul style="list-style-type: none"> • Review and comment on TEP 	<ul style="list-style-type: none"> • Review and comment on TEP
10	CAWG January 5, 2012 2:30 p.m. – 5 p.m.	<ul style="list-style-type: none"> • Discussion (as needed) on CWTP and TEP • Review final outcomes of outreach meetings 	<ul style="list-style-type: none"> • Presentation/Discussion of updates on CWTP and TEP • Presentation of Outreach Findings and next steps • Update on regional processes

	Meeting Date/Function	Outcomes	Agenda Items
	TAWG January 12, 2012 1:30 – 4 p.m. Steering Committee January 26, 2012 12 – 2 p.m.		<ul style="list-style-type: none"> TAWG/CAWG/SC update

Future Meeting Dates:

Additional meetings are anticipated in March, May and June 2012 to refine both the CWTP and TEP.

TAWG will continue to meet as needed through final adoption of MTC and ABAG's RTP/SCS anticipated for April 2013

Definitions

CWTP: Countywide Transportation Plan, TEP: Transportation Expenditure Plan

**Alameda CTC Community Advisory Working Group Meeting Minutes
Thursday, July 7, 2011, 12 p.m., 1333 Broadway, Suite 300, Oakland**

Attendance Key (A = Absent, P = Present)

CAWG Members:

<u>P</u> Joseph Cruz	<u>P</u> JoAnn Lew	<u>P</u> Anthony Rodgers
<u>A</u> Charissa Frank	<u>A</u> Teresa McGill	<u>A</u> Raj Salwan
<u>A</u> Arthur Geen	<u>P</u> Gabrielle Miller	<u>P</u> Diane Shaw
<u>A</u> Chaka-Khan Gordon	<u>P</u> Betsy Morris	<u>A</u> Sylvia Stadmire
<u>P</u> Earl Hamlin	<u>P</u> Betty Mulholland	<u>P</u> Midori Tabata
<u>P</u> Unique Holland	<u>P</u> Eileen Ng	<u>P</u> Pam Willow
<u>P</u> Lindsay Imai Hong	<u>A</u> James Paxson	
<u>P</u> Roop Jindal	<u>P</u> Patrisha Piras	
<u>A</u> David Kakishiba	<u>P</u> Joel Ramos	

Staff:

<u>P</u> Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation	<u>P</u> Diane Stark, Senior Transportation Planner
<u>P</u> Beth Walukas, Deputy Director of Planning	<u>P</u> Saravana Suthanthira, Senior Transportation Planner
<u>P</u> Bonnie Nelson, Nelson\Nygaard	<u>P</u> Angie Ayers, Acumen Building Enterprise, Inc.

Evaluation 101 Workshop**1. Evaluation 101 Workshop**

Stephen Decker and Jamey Dempster held a workshop that introduced CAWG members to the evaluation tools with an emphasis on modeling.

Regular Meeting**1. Welcome and Introductions**

Tess Lengyel called the Community Advisory Working Group meeting to order at 1 p.m.

Guests Present: Dave Campbell, East Bay Bicycle Coalition; Stephen Decker, Cambridge Systematics; Jamey Dempster, Cambridge Systematics; Laurel Poeton, Alameda CTC; Cathleen Sullivan, Nelson\Nygaard; Nancy Whelan, Nancy Whelan Consulting

2. Public Comments

There were no public comments.

3. Review of May 5, 2011 Meeting Minutes

CAWG members reviewed the meeting minutes from May 5, 2011, and by consensus approved them as written.

4. Update on CWTP-TEP Activities Since Last Meeting

Tess Lengyel gave an update on the Countywide Transportation Plan (CWTP) activities since the last meeting. She informed the committee that Alameda CTC has done a great deal of technical analysis, and the group will hear an overview presentation about this work. Other activities since the last meeting include updating the *Transit Sustainability and Integration* and *Transportation Demand Management and Parking Management* issue papers based on the comments received from the Community Advisory Working Group (CAWG) and Technical Advisory Working Group (TAWG).

Tess stated that Alameda CTC staff had planned on reviewing the project evaluation results with the group; however, a great deal of data was generated for review and before releasing the information, staff wants to ensure that the data is accurate. Staff has scheduled a meeting on July 21 and will share a project evaluation outcomes report with CAWG and TAWG.

5. Presentation on CWTP-TEP Planning Process

Bonnie Nelson gave a presentation on the planning process for the CWTP, TEP, and the Regional Transportation Plan (RTP). She reiterated that the CWTP and the TEP will be produced together with the help of CAWG and TAWG, and the Metropolitan Transportation Commission (MTC) will produce the RTP. Bonnie stated that the CWTP is a gateway document because projects and programs must be in the CWTP to get into the TEP and the RTP. She stated that in September, the first draft of the CWTP will be ready for the group to review; discussion of projects and programs for the TEP will continue through the fall, as well as discussion on the upcoming outreach and polling.

Questions/feedback from members:

- When is the adoption timeline for both the CWTP and TEP? Tess stated that the adoption of the final drafts will be in December 2011 or January 2012. Once approved, the TEP will need endorsement from city councils and the Board of Supervisors.

6. Presentations on CWTP Evaluation Outcomes

Steve Decker gave a presentation describing the performance evaluation process Alameda CTC used to analyze the results of projects and programs. He stated that the vision, goals, and performance measures adopted by Alameda CTC guided the evaluation process. He reviewed each of the steps in the evaluation process and gave an example of outcomes of a project and program.

Questions/feedback from the members:

- When the base case scenarios are run, will they provide output on the future land use and transportation systems? Do you assume that all capital projects from the last CWTP are complete? Bonnie stated that the base case assumes the current transit levels, what is assumed in the current Countywide Transportation Plan and committed projects.

- What are the assumptions included in the base case? For example, how do you decide how many people bike or walk? Bonnie stated that these are not assumptions but are outputs. She stated that we do not make assumptions on mode choice. Bonnie said that we use the model to predict the shifts.
- What was the geographical information system (GIS)/map-based tool used for? The GIS shows a visual display of geographic areas. Alameda CTC also used it to support screening measures. Alameda CTC also used the GIS to determine accessibility to low-income housing in scenario analysis.
- How will the modeling influence green-house gas (GHG) emissions, considering the tools 10 years ago did not include GHG? The tools now will assess the impact of GHG on scenarios.
- The group noted that the map showing North County and North Central County is incorrect. Staff will correct it in the next document.
- How do you show surface streets improvements to transit operations? How do you reflect a mutual enhancement? Beth stated that a suite of programs and projects were evaluated together. Where will Transit Demand Management (TDM) fit in? Staff stated that it could be a separate strategy.
- Members requested to see a matrix in an easy-to-understand format that explains how and why the tools came up with these evaluations.
- Are there operating-fund commitments for committed projects? Bonnie stated that we made assumptions that if a project is implemented, it's operating. Where will the operating shortfall come from if it exists? We will have an operating plan.
- When it comes to economy, did you look at cost effectiveness? Is there more detail on economy? Beth stated that staff will provide more detail. Staff is still digesting the information from the evaluation outcomes and more will be presented at the July 21st meeting.

CAWG members had many questions on the evaluation process/methodology and results in terms of the outcomes. Generally, the members did not agree with some of the results and requested more clarification of the explanations. The members were concerned with the input that Alameda CTC used to generate the results. Tess informed the group to submit comments in writing by August 5. She stated that staff will distribute the Evaluation Outcomes Report for the discussion at the July 21 meeting with CAWG and TAWG.

7. Breakout Discussions on Constraining the Lists

Beth led the discussion on constraining the projects and programs lists and reviewed a number of other factors that the committee should consider in addition to the sustainability goals. She stated that between July and September, Alameda CTC must develop a financially constrained list. The first draft list would be available in September and needs to be finalized by December.

The CAWG members separated into groups to give input on criteria to use to start constraining the lists. At the end of the breakout session, each group gave a summary of the information it covered and input to the full CAWG group. See Attachment A.

8. Break

The group decided that a break was not necessary, and the meeting continued.

9. Presentations on TEP Financial Projections and Parameters

Bonnie and Nancy Whelan gave a presentation and led the discussion on the TEP financial projections and parameters. The presentation provided an overview of:

- Schedule for the TEP development
- TEP parameter survey results
- Financial parameters
 - Amount
 - Duration
 - Split/programs/projects
- Financial parameters and programs

Questions/feedback from members:

- Will the distribution of money change for the jurisdictions regarding the rainy-day fund? Many jurisdictions are holding back and not spending the money they currently receive from Measure B. Tess said that the jurisdictions have clarified now they will spend down their existing reserves, especially when probed. An example of a rainy-day fund in the current plan is related to seniors and paratransit services, whereby grant funds have been used to stabilize the paratransit programs so they didn't have to cut services. This action by the Alameda CTC effectively used some of the existing grant funds as "rainy-day."
- A member suggested that the way things are presented to the public is important. The member also stated that Alameda CTC may need to have a message that the only people we can depend on are ourselves, and we must create jobs in the county. Bonnie stated that the reason Alameda CTC is doing three polls is in part to help in crafting the message.

Tess gave a presentation on sales tax measures around the state. The presentation provided a historical overview on the different measures in the state and how Alameda CTC is preparing for its third sales tax measure in Alameda County. The items covered in the presentation included the following:

- California Self-help Counties
- The evolution of transportation sales tax measures
- Funding volatility
- Transportation sales tax measures in the last decade
- Measures around the state that passed in the 21st Century
- Cumulative statewide investments
- The Alameda County sales tax evolution

10. Breakout Discussions on TEP Financial Projections and Parameters

The CAWG members separated into groups to discuss and give input on TEP financial projections and parameters.

At the end of the breakout session, each group gave a summary of the information covered in its individual group to the full CAWG group. See Attachment A.

11. SCS/RTP: Update on Countywide and Regional Processes

Beth stated on July 8, 2011, a joint MTC Planning and ABAG Administration committee meeting will take place. She gave highlights on the countywide and regional update processes as follows:

- Alameda CTC will receive the discretionary budgets at the end of July.
- There are no meetings in August.
- MTC released the descriptions of the proposed draft alternative land-use and transportation scenarios, which include five land-use options and two transportation options. MTC will prepare the details of those options in August.

12. Update: Steering Committee, CAWG, and TAWG and Other Items/Next Steps

Tess gave an update on the fall outreach approach. She mentioned that Alameda CTC will repeat the strategy for the first round of outreach in the fall as follows:

- Hold five community workshops around Alameda County.
- Provide the ability to perform outreach via the website.
- Administer an Outreach Toolkit at community events/meetings.

Tess stated that the results of the first outreach showed that the public participation from the Asian and Hispanic communities was low as compared to the relative percentage of the county population. She informed the group that there will be an increase in coordination and targeted outreach to Asian and Hispanic populations. Tess mentioned that staff will present the outreach approach and strategy for the fall to the Steering Committee at the July 28 meeting for approval. Tess requested input from CAWG for ideas on how to reach more people with the second round of outreach.

Feedback from the members:

- A member suggested that Alameda CTC advertise by placing posters on the bus.
- A member suggested that the City of Fremont will host an Asian and Indian fair and it would be helpful if Alameda CTC attended for the TEP.
- A member suggested that Alameda CTC should access places that are more demographically diverse.

13. Adjournment

The meeting adjourned at 5 p.m.

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CAWG FLIP CHART NOTES July 7, 2011

Group 1: Emphasis Areas for CWTP Lists

- Health
- Cost effectiveness
- “Active Transportation” – Physical Activity
- Safety (crime, lighting, sidewalks, quality of life)
- Vehicle Miles Traveled (VMT) Reduction
- Local jobs/industry (economy)

How to Constrain the CWTP Project Lists

- Projects that work well together, e.g. timing
- Supports SB375
 - Reduces VMT and promotes affordable housing
 - New and existing
- Contribute to public health
- Potential to leverage other funds
- Cost effective (bang for buck)
- Job creation
- Maintenance

TEP Recommendations

- Yes – augment and extend the transportation sales tax to degree possible
 - Test messages
 - “self help” proactive county
- Study how sales tax impacts poor (regressive)
 - Affects messaging
 - Affects support for augmentation
- Develop better way of showing what we are getting for the tax dollars
- Split of Projects/Program
 - Increase programmatic funding
 - Maintain what we have before building more
- Performance Measures
 - Leverage is important e.g., Transit efficiency
- Questioning need for Project Development, Innovation and Technology (PDIT) category
 - Need for flexible dollars
 - 5% too small?
 - 15% too large?
 - If only have 5% for bike/ped why 15% for PDIT? Seems out of balance

- Important Projects and Programs
 - Eco student bus pass
 - Senior rides for free
 - Paratransit
 - Safe routes to transit
 - Safety of streets especially at bus stops/shelters
 - Travel training for all ages
 - Bike/Ped – completing local bike/ped plans
 - Better bus shelters
 - Truck lanes

Group 2: Emphasis Areas for CWTP Lists

- Lack definitions – need these first in order to comment
- Maintenance not just pavement, and include transit needs
- Need money to maintain transit capital
- Add cost effectiveness
- Affordability to low and middle income is important (is this under Equity?)
- Can't afford new capital
- Restore transit cuts
- What to include in “economy?”
- Why does bike/ped rate low in economically vibrant areas?
- Where is GHG included? Environment?
- Model already run, why define now?
- Need to represent seniors and kids
- How to identify cross tabs? More synergy

How to Constrain the CWTP Project Lists

- Synergy amongst projects and programs
- Ability to sustain or maintain
- Maintain and restore existing services
- Serve low income and communities of color
 - Improve social equity (e.g. student bus pass)
- Reduce VMT and GHG
- Benefit health
- Maintenance is key
 - Cost effective
- Identify what has worked
 - Benefits as promised
 - Within budget
 - Jobs created
- Need clear matrix and off model analysis

TEP Recommendations

- Augment and extend transportation sales tax
 - ¼ cent seems easier - but may be tough now with the economy
 - ½ cent would be good if it would pass
 - Could we do it without new state bill?
 - Makes round number
 - Doubles current sales tax
 - What about AC Transit broken promises on their parcel tax?
 - What if MTC proposes gas tax at the same time? When will we know?
 - Show what we have accomplished
 - Not just same programs
- Project and Programs – what's included will affect sales tax
 - Programs emphasis
 - All 3 categories: Projects, Programs, PDIT
- Maintain goals:
 - Why infill TOD such high emphasis? (de-emphasize)
 - Public health and safety is important (increase)
 - Reduce GHG emissions – help meet state regulations (emphasize)
 - Congestion relief – de-emphasize (except locally – couple with reducing GHG, livability, complete street)
 - Sustainability
- Expand Programs
 - Programs are most important
 - Sustainability
 - Support existing investments – what works e.g. transit operations and maintenance, good streets and roads
- Kids pass as a new program
 - Program does not (easily) fit under existing funding
 - Bike and Ped improvements
- Criteria
 - Do not easily fit under existing funding
 - Biggest best bang for buck within our goals

Group 3: Emphasis Areas for CWTP Lists

- Cost effectiveness
 - With regards to reducing VMT
- Overall efficiency
 - Cost effective with better efficiency
- Strive for better performance
 - With regards to reducing VMT – do more with less
- Low income households transportation expenditure (burden) should be taken into account
- Conflict/ equity – nuance
 - Example: Improve areas around MacArthur BART – it will attract gentrification and push existing low-income residents out

IN STRATEGIES AND EMPHASIS AREAS

- Environment
 - How do we reflect public health in the evaluation?
 - How do we reflect Goods Movement?
- Readiness and cost of delay could be new criteria
- A way to constrain is by how the projects and programs performed in evaluation

TEP Recommendations

- No choice but to augment since existing money is committed
 - Considering current situation and public view of Government (funding) having a sunset date might help the measure pass
 - More focus on programs
 - Technology could be a small pie/possibly be leveraged
 - Implementation guideline necessary for new pot of money
 - Look at project outcome, not necessarily being shovel ready
 - Support or condition funding that encourages continued affordable housing in PDA areas
 - Develop implementing guidelines for funding that supports improvements without displacing low-income households
- Projects and Programs that show immediate results – should be priority
 - Implement smaller/small scale projects that will show immediate benefit
 - Reinstate transit
 - Projects, programs that are cost effective and serve low-income people
 - Cost-Effective
 - Politically feasible but visionary



Alameda CTC Technical Advisory Working Group Meeting Minutes
Thursday, July 14, 2011, 1:30 p.m., 1333 Broadway, Suite 300, Oakland

Attendance Key (A = Absent, P = Present)

Members:

<u>A</u> Alex Amoroso	<u>P</u> Diana Keena	<u>A</u> Tina Spencer
<u>A</u> Aleida Andrino-Chavez	<u>A</u> Paul Keener	<u>A</u> Iris Starr
<u>A</u> Marisol Benard	<u>A</u> Obaid Khan	<u>A</u> Mike Tassano
<u>A</u> Kate Black	<u>A</u> Wilson Lee	<u>A</u> Lee Taubeneck
<u>A</u> Jeff Bond	<u>A</u> Tom Liao	<u>A</u> Andrew Thomas
<u>P</u> Jaimee Bourgeois	<u>A</u> Albert Lopez	<u>A</u> Jim Townsend
<u>A</u> Charlie Bryant	<u>P</u> Joan Malloy	<u>P</u> Bob Vinn
<u>P</u> Ann Chaney	<u>A</u> Dan Marks	<u>P</u> Marine Waffle
<u>P</u> Mintze Cheng	<u>A</u> Gregg Marrama	<u>A</u> Bruce Williams
<u>P</u> Keith Cooke,	<u>P</u> Val Menotti	<u>A</u> Stephen Yokoi
<u>A</u> Brian Dolan	<u>P</u> Neena Murgai	<u>P</u> Karl Zabel
<u>P</u> Soren Fajeau	<u>P</u> Matt Nichols	<u>A</u> Farooq Azim (Alternate)
<u>P</u> Jeff Flynn	<u>P</u> Erik Pearson	<u>A</u> Carmela Campbell (Alternate)
<u>P</u> Don Frascinella	<u>P</u> James Pierson	<u>P</u> Gary Huisingh (Alternate)
<u>A</u> Susan Frost	<u>A</u> Jeri Ram	<u>P</u> Nathan Landau (Alternate)
<u>A</u> Jim Gannon	<u>A</u> David Rizk	<u>A</u> Cory LaVigne (Alternate)
<u>A</u> Robin Giffin	<u>A</u> Mark Roberts	<u>A</u> Larry Lepore (Alternate)
<u>A</u> Mike Gougherty	<u>A</u> Brian Schmidt	<u>A</u> Kate Miller (Alternate)
<u>A</u> Terrence Grindall	<u>A</u> Peter Schultze-Allen	<u>P</u> Bob Rosevear (Alternate)
<u>A</u> Cindy Horvath	<u>P</u> Jeff Schwob	

Staff:

<u>P</u> Art Dao, Alameda CTC Executive Director	<u>P</u> Bonnie Nelson, Nelson\Nygaard
<u>P</u> Tess Lengyel, Deputy Director of Policy, Public Affairs and Legislation	<u>P</u> Diane Stark, Senior Transportation Planner
<u>P</u> Beth Walukas, Deputy Director of Planning	<u>P</u> Saravana Suthanthira, Senior Transportation Planner
	<u>P</u> Angie Ayers, Acumen Building Enterprise, Inc.

1. Welcome and Introductions

Beth Walukas called the meeting to order at 1:35 p.m. The meeting began with introductions.

Guests Present: Gillian Adams, Association of Bay Area Governments (ABAG); Ashley Brooks, City of Livermore; Steve Decker, Cambridge Systematics, Inc.; Jamey Dempster, Cambridge Systematics, Inc.; Jane Kramer, STAND; Betty Mulholland, Community Advisory Working Group (CAWG); Laurel Poeton, Alameda CTC

2. Public Comments

There were no public comments.

3. Review of May 12, 2011 Minutes

TAWG members reviewed the meeting minutes from May 12, 2011 and by consensus approved them as written.

4. Update on CWTP-TEP Activities Since Last Meeting

Tess Lengyel gave an update on the Countywide Transportation Plan (CWTP) activities since the last meeting. She informed the committee that Alameda CTC has done a great deal of technical analysis, and the group will hear an overview presentation about this work. Other activities since the last meeting include updating the *Transit Sustainability and Integration* and *Transportation Demand Management and Parking Management* issue papers based on the comments received from the Community Advisory Working Group (CAWG) and TAWG. On July 7, staff reviewed preliminary information on project evaluation outcomes with CAWG and as a result of that meeting, staff has scheduled an additional meeting for both CAWG and TAWG on July 21 to review the project evaluation results.

Beth stated that Alameda CTC staff had planned on reviewing the project evaluation results with the group; however, 112 pages of data was generated for review and before releasing the information, staff wants to ensure that the data is accurate. At the July 21 meeting, staff will share a project evaluation outcomes report with CAWG and TAWG.

5. Presentation on CWTP-TEP Planning Process

Bonnie Nelson gave a presentation on the planning process for the CWTP, TEP, and the Regional Transportation Plan (RTP). She reiterated that the CWTP and the TEP will be produced together with the help of CAWG and TAWG, and the Metropolitan Transportation Commission (MTC) will produce the RTP. Bonnie stated that the CWTP is a gateway document because projects and programs must be in the CWTP to get into the TEP and the RTP. She stated that in September, the first draft of the CWTP will be ready for the group to review; discussion of projects and programs for the TEP will continue through the fall, as well as discussion on the upcoming outreach and polling.

6. Presentation on CWTP Evaluation Outcomes

Steve Decker gave a presentation describing the performance evaluation process Alameda CTC used to analyze the results of projects and programs. He stated that the vision, goals, and performance measures adopted by Alameda CTC guided the evaluation process. He reviewed each of the steps in the evaluation process and gave an example of a project and program outcomes.

Questions/feedback from the members:

- Is the outcome of groups, projects, and programs a separate list from those packaged in the scenarios? Steve said yes, it's a separate list that will be a combination of the screened projects/programs and scenario results.
- How did you assign projects and programs in the land-use scenario? Bonnie stated that projects and programs were chosen that serve Priority Development Areas (PDAs) and new development so that projects/programs are matched to areas of new density.
- Will one project fit into more than one category? Steve said that one project can fit into multiple scenarios but was included in no more than two.
- In the last round of projections, before the RTP, the future projections in the model did not take into account the feedback loops that one might expect from changing

development plans. For example, the model would put a lot of new development in an area but did not adjust for people's ability to do walk trips and go to the store without driving. Will this be addressed in this go round? Beth responded that staff will look into whether the modeling process can do this.

- How will the mode choice work in the model? The expectation is for the percentage of the biking and walking trips to increase with this model, and it will not. The member stated that the previous version of the model had the same percentage as the baseline in the current model. Steve said the mode choice model is multimodal. Saravana stated that the current model is valid for the total number of trips for biking and walking.
- Eight goals are shown, and it appears that the ninth goal is missing. Bonnie stated that goal 7 *Well Maintained* and goal 9 *Supportive of a Healthy and Clean Environment* were not measured in the screening phase. She stated that they were measured in the scenarios.
- Have the cities seen the screening performance measures? Beth said that performance measures were adopted in spring after a multi month review period and they will also be available at the Wednesday, July 21 and staff will present it at the Evaluation Outcomes meeting.
- Why does the I-880 high-occupancy vehicle (HOV)/high-occupancy toll (HOT) Lane project score low in congestion relief? Beth said that staff will look at this and get back to the group with an answer, and that project scoring was based upon packages of projects and programs that were scored relative to one another.
- Are the goals weighted equally? Jamey Dempster said yes.
- How can we look at the mode share of the biking and walking trips? How will we know the number of people travelling to BART on bikes? Staff responded that walking and bicycling trips are both included in the travel model and attract trips based on factors in the model such as trip distance and the available transportation network. Walking and bicycling trips made to access public transportation (such as BART) are specifically accounted for in the Alameda County travel model. Non-motorized trips to access transit are included in the total walking and bicycling trips summarized and presented in the Evaluation Report.
- How do you bridge multimodal at a project level and system level? For example, the I-880 HOV/HOT Lane project shows low at a project level. : Staff responded that translating scenario modeling results, which represented a mix of projects and program investment assumptions, into performance results for individual projects was chosen as one way to present evaluation results. Designed initially as a high-level evaluation of transportation scenarios, the methodology does not provide detail on how individual projects contributed to the modeling scenario; an individual transportation change usually produces changes too small to be evident at a countywide level. The modeling scenarios were created using similar project types to the extent possible given the number of projects, funding targets and other elements required as part of the analysis and the travel model is designed to represent changes at a large (scenario-level) scale. The values shown were only one part of a larger evaluation process that attempted to blend the large scale scenario modeling results with individual project-level results from the screening evaluation.

What is the approach on safety for the I-880 HOV/HOT Lane project, which is rated low? How will a transit project fit into this evaluation process for safety? Staff responded that the analysis for "safety" was based on project location and assumed that any project would improve safety conditions on the roadway segment through the incorporation of various elements during the construction phase. Another assumption was that the greatest safety improvements would be made in areas where historical crash rates were above-average. The measure reflects how much a project could potentially address safety concerns, based on regional research. The measure does not reflect whether a project was estimated to be safe or not safe, but rather if it addresses these areas. This level of analysis is often used for high-level regional prioritization analysis in order to compare projects to each other but not to provide specific safety thresholds. Project-specific analysis that could deem project expectations to be "safe" or "not safe" are done during other phases of project development to implement safety features.

Beth informed the group to submit comments in writing by August 5. She stated that staff will distribute the Evaluation Outcomes Report for discussion at the July 21 meeting with CAWG and TAWG.

7. Discussion on Constraining the Projects and Programs List

Beth led the discussion on constraining the projects and programs lists and reviewed with the group a number of other factors that should be considered in addition to the sustainability goals. She stated that between July and September, Alameda CTC must develop a financially constrained list. The first draft list would be available in September and it would need to be finalized by December. Beth requested input from TAWG on criteria presented to use to start constraining the list. She mentioned that we have goals oriented toward developing PDAs and reducing single occupancy vehicles and inquired if the group has input beyond the goals. For example, some projects may be high cost, high performers, but only need a relatively small request to be completed such as a project that costs \$100 million and only needs \$2 million to complete it. Alameda CTC may consider bringing these types of projects to the top of the list since it takes very little to complete them and commitment has already been demonstrated. A member inquired how staff will factor in ongoing maintenance costs with the total project costs. Beth said that submissions included their operating budgets within the total costs.

8. Presentations and Discussion on TEP Financial Projections and Parameters

Bonnie gave a presentation and led the discussion on the TEP financial projections and parameters. The presentation provided an overview of:

- Schedule for the TEP development
- TEP parameter survey results
- Financial parameters
 - Amount
 - Duration
 - Split/programs/projects
- Financial parameters and programs

Questions/feedback from members:

- What happens if the sales tax is in perpetuity, and Alameda CTC goes back to the voters in 20 years, and the measure does not pass at that time? Tess explained that Alameda CTC will go back to the voters in X number of years (X must be defined in the Expenditure Plan) to amend and/or provide a confirmation to the voters if we are on track. Under these conditions, it will not require a two-thirds vote to pass. Bonnie informed the group that Alameda CTC will need to write in the plan the number of years it will go back to the voters. She stated that the number of years will be tested in the next poll.
- Will the new category, project development/innovation/technology (PDIT), be applied to project development if it falls to a new program? Bonnie said that it could be either a project or a program.
- Did we have polling questions relative to the project/program split? Tess stated that programs ranked high, and projects were much lower in the poll. She said that in September, Alameda CTC will be discussing preliminary projects and programs for the TEP. TAWG will also see a list of polling questions for the October 2011 poll. Another poll will take place around May 2012 to determine if the TEP will be successful if placed on the ballot. Tess said the challenge is there will be many revenue enhancements locally and from the state that will likely be on the ballot and could impact the TEP measure in 2012.
- A member stated that the deciding factor on the project/program split is if Alameda CTC will augment the sales tax and have the ability to put more funding toward projects.
- How common are measures in perpetuity around the state? Bonnie stated that measures in perpetuity are most common in Los Angeles and San Francisco. She stated that in the Bay Area, five counties out of seven passed the Vehicle Registration Fee measure in perpetuity. Tess mentioned that Los Angeles has two measures in perpetuity and one measure that passed in 2008 for 30 years.
- To compare the different options, can Alameda CTC get the information out there for the impact per household? How much will the sales tax cost me and my family? Tess said that staff can put together the benefit and the cost for a household.
- Many of the TAWG members agreed that having a measure that is in perpetuity is a good approach.

Bonnie requested input on what criteria TAWG would like to see used for projects and programs to go from the CWTP to the TEP. For example, if we look at capital projects, they should be shovel-ready. Tess stated if we look at project readiness, which will most likely be included in the TEP, Alameda CTC may need to ask for additional information from the jurisdiction on the submitted projects to determine readiness. Tess stated that in the current Expenditure Plan, Alameda CTC has two required deadlines: 1) environmental clearance within five years; 2) a full funding plan within 5 years. She said that we want to look at things like this, especially if we are looking at an in perpetuity measure.

Question/feedback from the members:

- In regards to what is shovel-ready, start with the information in the current measure and adjust it if necessary.
- Look for things that are difficult to get funding for but are important.
- Tess stated that if we do the PDIT, we may need to define project readiness.
- How will we get projects through environmental clearance in five years when the measure is for 40 years? Bonnie stated that the current measure required all capital projects to be through environmental review in 5 years. One year extensions are allowable with a vote of the Board. In the current TEP parameters, it is recommended that this be extended to 7 years. Although the expenditure plan is likely to extend well beyond this time, projects are generally front loaded to ensure they get built or the funding for them can be reprogrammed.

Tess gave a presentation on the sales tax measures around the state. The presentation provided a historical overview on the different measures in the state and how Alameda CTC is preparing for its third sales tax measure in Alameda County. The items covered in the presentation included the following:

- California Self-help Counties
- The evolution of transportation sales tax measures
- Funding volatility
- Transportation sales tax measures in the last decade
- Measures around the state that passed in the 21st Century
- Cumulative statewide investments
- The Alameda County sales tax evolution

9. SCS/RTP: Update on Countywide and Regional Processes

Beth gave highlights on the countywide and regional update processes as follows:

- Alameda CTC will receive the discretionary budgets at the end of July, and staff will share this information with TAWG.
- There are no meetings in August.
- MTC released the descriptions of the proposed draft alternative land-use and transportation scenarios, which include five land-use options and two transportation options. The details of what is in those options will be prepared in August.

Public Comment:

Jane Kramer with Stand stated that when she has participated in a phone survey, her experience has been to answer a question one way, and if the same question is asked another way, her answer to the second question may contradict the first answer. In one case, the poll taker was not pleased and stated that the survey was not valid. She stated that she is sure that the poll was discarded because of the contradictory answers. Jane encouraged Alameda CTC to not discard questionnaires with contradictory answers, and she suggested that the contradictions may spark discussion within the agency.

10. Update: Steering Committee, CAWG, TAWG, and Other Items/Next Steps

Tess gave an update on the fall outreach approach. She mentioned that Alameda CTC will repeat the strategy for the first round of outreach in the fall as follows:

- Hold five community workshops around Alameda County.
- Provide the ability to perform outreach via the website.
- Administer an Outreach Toolkit at community events/meetings.

Tess stated that the results of the first outreach showed that the public participation from the Asian and Hispanic communities was low as compared to the relative percentage of the county population. She informed the group that there will be an increase in coordination and targeted outreach to Asian and Hispanic populations. Tess mentioned that staff will present the outreach approach and strategy for the fall to the Steering Committee at the July 28 meeting for approval. Tess requested input from TAWG for ideas on how to reach more people with the second round of outreach.

Feedback from the members:

- A member suggested that the schools would be an effective way to reach a large group of people at one time.
- A member suggested an e-news alert of public outreach. Tess requested the jurisdictions put a link on their website to the online survey to help reach the general public.

11. Member Reports/Other Business

None

12. Adjournment

The meeting adjourned at 4:15 p.m.