

PROPOSITION A: SAN DIEGO TRANSPORTATION IMPROVEMENT PROGRAM

JULY 31, 1987

San Diego



**ASSOCIATION OF
GOVERNMENTS**

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Prepared by
The San Diego Association of Governments
Serving as the
San Diego County Regional Transportation Commission

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Abstract

TITLE: Proposition A: San Diego Transportation Improvement Program

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ABSTRACT: The report provides an overview, analysis, and description of the major highway, public transit, local street and road, and bicycle projects and programs which would be implemented with revenues made available through Proposition A. The report includes the Ordinance and Expenditure Plan and the enabling legislation (SB 361).

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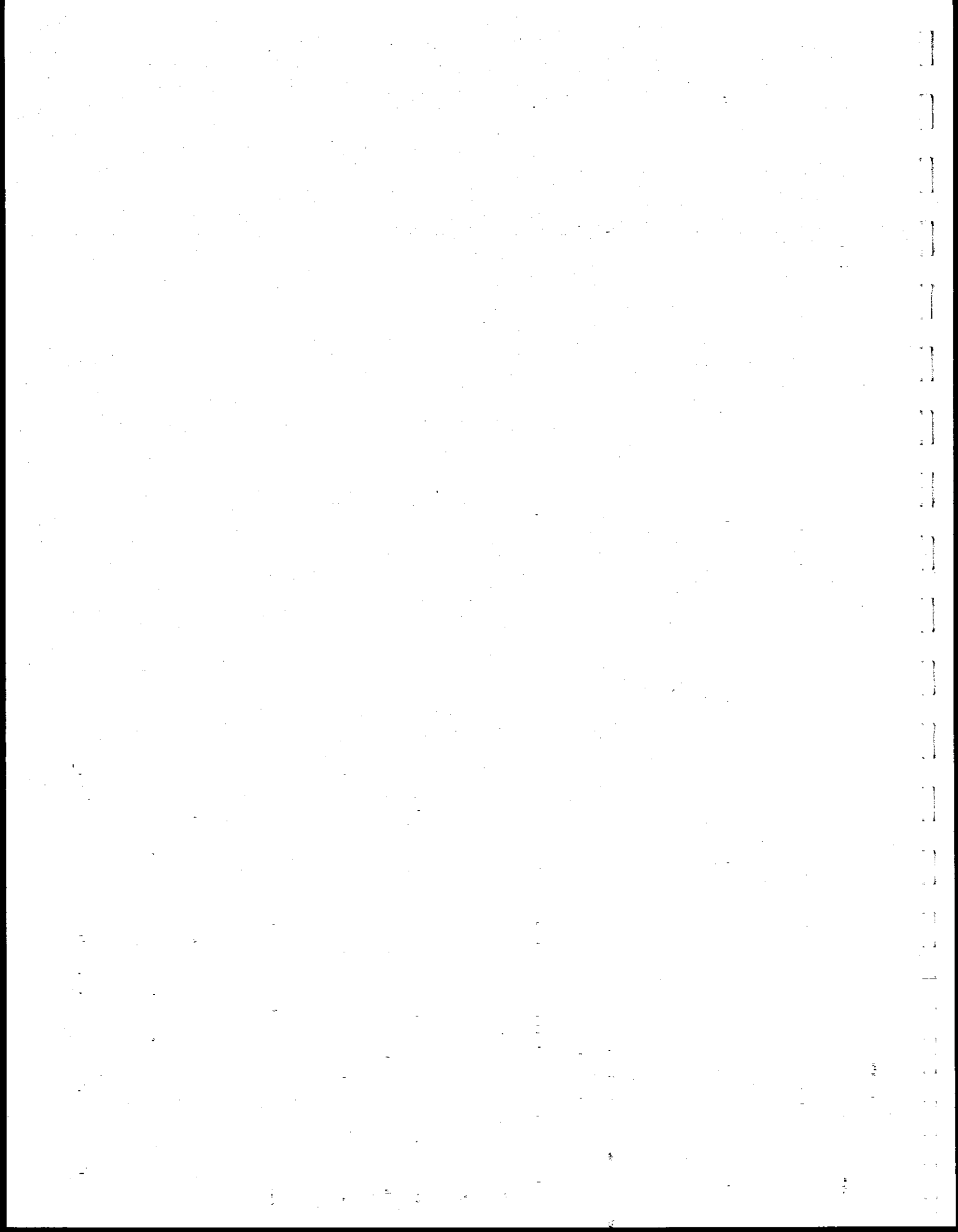
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Section I: Overview

Introduction

The San Diego Association of Governments (SANDAG) Board of Directors, serving as the San Diego County Regional Transportation Commission, has recommended that a 1/2% local transportation sales tax ballot measure be placed before the voters of San Diego County in November, 1987. If approved, the measure, designated as Proposition A, would provide the revenues needed to implement the region's highest priority transportation projects.

The major projects to be funded by the proposed measure, as presented in the Expenditure Plan, have been drawn from the SANDAG Regional Transportation Plan (RTP), which is the result of over a decade of cooperative transportation planning efforts among the region's local jurisdictions. The projects contained in the Expenditure Plan are aimed at solving the region's most pressing transportation problems by completing the most critical segments of the region's planned highway and transit systems, providing additional capacity in the most heavily traveled corridors and improving and maintaining the region's local roadways. This section provides the background regarding the region's transportation needs, the process followed in developing Proposition A, and a general description of the measure. Following sections present the specific projects to be built with the revenues provided through the measure and the ordinance implementing the measure.

The Region's Transportation Financing Needs

Proposition A is an outgrowth of the detailed analysis of the costs and revenues for the region's transportation system over the next 20 years performed as part of the RTP. The RTP contains estimates of the costs of carrying out the transportation improvements recommended in the plan, as well as the costs of operating and maintaining the region's transportation facilities over the next 20 years. Projections also are made of all known revenue sources over the next 20 years, with available revenues compared to the estimated costs to determine the amount of the funding shortfall. The RTP recommends financial actions to be undertaken to address the identified funding shortfalls. The 1986 RTP contains the most recent regionwide estimates of costs and revenues. As shown in Table 1 below, the total costs of the transit, highway, and local street and road improvements recommended in the RTP for the next twenty years equal \$10.0 billion, with only \$5.4 billion in local, state, and federal revenues projected over the same period — leaving a shortfall in funding of \$4.6 billion.

TABLE 1

TRANSPORTATION NEEDS SUMMARY
(In Millions of 1985 Dollars)

	<u>Costs</u>	<u>Revenues</u>	<u>Shortfall</u>
Highways	\$2,800	\$1,640	\$1,160
Local Streets & Roads	3,700	1,310	2,390
Transit	<u>3,500</u>	<u>2,450</u>	<u>1,050</u>
Total	\$10,000	\$5,400	\$4,600

To address the serious shortfall identified, the RTP recommended that SANDAG place a 1/2% local sales tax on the ballot to provide funding for the highest priority projects recommended in the RTP.

Development of the Local Transportation Sales Tax Recommendation

The recommendation to pursue the local sales tax contained in the 1986 RTP was the culmination of a long and thorough development process which began with the adoption of the 1984 RTP. The 1984 RTP also identified significant shortfalls in the funds needed to implement the recommended highway, transit, and local street and road improvements. The recommended actions in the 1984 RTP focused on an evaluation of all potential revenue sources. It was recommended that, if voter approval of a long-range funding source was determined to be required, activities should be initiated to prepare such a funding measure for the ballot.

In response to the recommendations of the 1984 RTP, as well as a series of major statewide transportation needs studies and transportation financing legislative proposals in 1984, the SANDAG Board of Directors appointed a Transportation Financing Advisory Committee (TFAC) in January 1985. The TFAC consisted of an elected official from each of the sixteen cities in the region (prior to the incorporation of Encinitas and Solana Beach) and the County of San Diego, as well as resource members from the San Diego Taxpayers Association, the League of Women Voters, the Greater San Diego Chamber of Commerce, the San Diego Highway Development Association, the North County Transportation Coalition, and CALTRANS. The objective of TFAC was to review the region's transportation financing needs and to make recommendations to the SANDAG Board of Directors on actions necessary to meet the identified needs. The TFAC met from March 1985 through March 1986 in an effort to resolve the region's transportation funding problems.

The TFAC began its efforts by reviewing the costs of the region's needed transportation facilities, forecasts of available revenue, and the estimated funding shortfalls. Confronted with a funding shortfall of the magnitude shown in Table 1, the TFAC reviewed the potential of increased state and federal revenues making up the difference. Upon consideration of the major funding shortfall in the state highway program currently, the continuing delays in the implementation of important state highway projects, the lack of successful efforts to obtain a significant increase in the gas tax for highway and local street and road projects, and the on-

going cutbacks in federal transportation funding in the federal government's effort to reduce the nation's growing budget deficit, the TFAC determined that it was unlikely that any significant portion of the region's unmet needs would be met by increased state or federal revenues. In addition, given the dramatic fluctuations in state and federal funding in recent years and the great degree of uncertainty surrounding the future of many of the traditional state and federal transportation programs, the TFAC felt that a reliable, stable, and predictable local source of funding was necessary to provide the foundation for a long-range financing program to implement the region's needed transportation improvements. It was also felt to be important to have a revenue source with a viable bonding option in order to accelerate the construction of the most critical major capital projects.

The TFAC then began to examine the viability of alternative local funding sources. A number of sources were evaluated including a local sales tax, a local gas tax, a local payroll tax, increased developer fees and charges, benefit assessment districts, and tax increment financing. Overall, the local sales tax was considered to be the most appropriate source because it has the ability to generate the level of revenues necessary to meet the region's needs and because it grows with inflation, population growth, and income growth. An increase in the gas tax was not favored because it does not increase with inflation, causing the buying power of the gas tax to decline significantly over a long period of time. In addition, a gallonage-based gas tax fails to keep pace with the increase in travel demand due to increasing vehicle fuel efficiency. As an illustration, in order to generate the same amount of funds over a 20-year period as a 1/2% sales tax, the gas tax would have to be raised by 20¢ per gallon.

Local Transportation Sales Tax Enabling Legislation

In late April 1985, the TFAC recommended to the SANDAG Board of Directors that enabling legislation be pursued to allow a local sales tax measure to be placed on the ballot. The SANDAG Board of Directors approved the TFAC recommendation, as well as the draft enabling legislation language developed through the TFAC. The SANDAG-sponsored bill, SB 361 (see Appendix A) carried by Senator Deddeh, was passed by the legislature in September and signed by the Governor in October 1985. The legislation:

- o Creates the San Diego County Regional Transportation Commission, which would administer the sales tax revenues if the tax increase is approved by a majority of the voters;
- o Designates the SANDAG Board to act as the Commission and to provide staff to it;
- o Authorizes the Commission to determine the rate (up to 1%), purposes, and term (if any) of the tax to be included in the ballot measure and to have the County submit the measure to the voters;
- o Authorizes the Commission to allocate the revenues as per the terms of the ballot measure; and
- o Authorizes the Commission to issue bonds payable from the proceeds of the tax.

Local Transportation Ballot Measure Development

The enabling legislation provided the general authority for a local sales tax measure and the TFAC worked from the fall of 1985 through the spring of 1986 to develop a recommendation regarding key decisions such as the amount and duration of the tax and the specific uses of the tax revenues. The TFAC focused its efforts on developing a recommended ballot measure proposal which could be agreed to by all the local jurisdictions, could be supported by the public, and which would meet a significant portion of the region's needs. The structure of the ballot measure was based on updated needs information for transit, highway, and local street and road improvements, the experiences of other areas which had pursued local sales taxes (Los Angeles, Santa Clara, Orange County, and Phoenix), and the results of local public opinion surveys regarding the sales tax concept.

Based on these considerations, the TFAC approved forwarding a recommendation to the SANDAG Board of Directors for a 1/2% sales tax increase for a duration of 20 years with one-third of the revenues allocated for transit improvements, one-third for local street and road improvements, and one-third for highway improvements. This recommendation was accepted by the SANDAG Board of Directors in April, 1986 for review and comment by local jurisdictions and other interested agencies and groups. After substantial input from the local jurisdictions and other local groups, the SANDAG Board of Directors approved the ballot measure proposal, as recommended by the TFAC, in May, 1986 and in July, 1986 established the election date for the local transportation ballot measure for November 3, 1987. The measure has been designated as Proposition A for the November election.

Expenditure Plan for Proposition A

One of the requirements of SB 361 is that the Commission (SANDAG) must approve a retail transactions and use (sales) tax ordinance and expenditure plan. The Expenditure Plan is required to include the allocation of revenues by purpose, while the Ordinance specifies the amount and duration of the tax, the purposes for which the tax revenues will be used, and other legal requirements related to the implementation of the measure. The Ordinance becomes effective at the close of the polls on the day of the election at which the ballot measure is approved.

Over the last several months, the specific projects and programs to be included in the Expenditure Plan have been developed and refined with input from local jurisdictions, CALTRANS, the region's transit operators, and other groups. Various elements of the Ordinance have also been refined. Other refinements have been made as a result of the input received during the public review period on the draft Expenditure Plan and Ordinance. Section II - Expenditure Plan Analysis provides additional background information and details regarding the content of the Expenditure Plan. The full text of the San Diego Transportation Improvement Program Ordinance and Expenditure Plan is presented in Section III.

Section II: Expenditure Plan Analysis

Introduction

The revenues from Proposition A will be used for three primary purposes: highway improvements, public transit improvements, and local street and road improvements. The specific projects or types of projects to be implemented, the implementation process to be followed, and the general funding assumptions under each of the three categories are discussed below. The 1986 Regional Transportation Plan is the primary source of project cost estimates as well as projections of revenues from federal, state, and local sources. In some cases, these estimates have been refined based on subsequent more detailed studies or other more current information.

Highway Improvements

Proposition A will provide up to \$750 million for the region's most important highway improvements that are now unfunded. The timely construction of the major highways proposed for funding is essential in order to meet the region's travel needs while minimizing congestion and improving traffic safety. The major highway projects proposed for funding in the Expenditure Plan have been drawn from SANDAG's Regional Transportation Plan (RTP). The bonding authority provided to the Commission by SB 361 would provide for the completion of the proposed projects at the earliest possible date.

Regional Transportation Plan Highway Analysis: Currently, there are about 290 miles of major freeways and expressways in the San Diego region. The freeway system provides the highest level of regional travel service and carries about half of all the daily travel made in the region. In order to meet the region's travel needs, the RTP proposes the addition and upgrading of about 85 miles of freeways and expressways. These major projects have an estimated capital cost for right-of-way acquisition and construction totaling about \$2.2 billion over the next 20 years. The construction of these needed projects would increase the region's freeway and expressway mileage by about 30% during a period when population is forecast to increase by nearly 35%, vehicle trips by 50%, and highway traffic by nearly 65%. These important highway improvements will reduce the amount of projected heavy freeway congestion by more than half. If the projects are not built in a timely manner, the amount of heavy freeway congestion in the San Diego region will increase dramatically with many areas experiencing very heavy freeway traffic volumes and congestion levels.

Since the early 1960's, nearly 80% of all the major freeway expenditures in the San Diego region have been for the four Interstate highways (I-5, I-8, I-15, and I-805). While there are generally enough revenues for these Interstate routes, there remain major funding shortfalls for the non-Interstate highways. Most of the region's highest priority highway needs are along the designated Primary routes (SR52 and SR78) and Urban routes (SR54, SR56, SR76, and SR125) for which there is relatively

little state and federal highway funding available. Most of these non-Interstate highways are not considered a high priority for state and federal funding since they predominantly serve local traffic needs within the region.

With increasingly limited state and federal highway funds available, there has been an increasing need and reliance on local funding sources for non-Interstate highway projects. Both the Governor and Legislature have endorsed local sales tax measures to provide funding for locally needed highways.

The RTP highway financial analysis concluded that there was an estimated 20-year deficit for state highways of about \$1.2 billion with highway costs exceeding existing revenue sources. Failure to meet the unfunded state highway deficit will likely result in the elimination or deferral of most non-Interstate highway projects. The RTP recommends that the limited state and federal highway funds should be used to fully cover all state highway maintenance, administration, and operations costs. These costs, which total nearly \$600 million over the next 20 years, are clearly a state responsibility. State and federal funds should also fund all Interstate highway improvements identified in the RTP (over \$400 million) and all state highway rehabilitation, safety, and minor projects (\$300 million). These projects have the best chances of receiving state and federal funding. The revenues from the measure would be used exclusively for the high-priority non-Interstate highways as described in the following section. Without new revenues, many of these needed highway projects would not be completed for 30 to 40 years, if ever.

Expenditure Plan - Highway Project Listing: The proposed local transportation measure would provide up to \$750 million for the major highway projects described in this section. The projects and the recommended funding levels are summarized on Table 2 and shown on Figure 1.

If Proposition A is approved by the voters, the initial highway revenues will be used to get the projects ready for early construction. Most of the projects do not now have completed route location and environmental studies to enable their immediate construction. Getting the projects ready for right-of-way acquisition and construction is important in order to be able to use any other funds that might become available. It is also anticipated that the measure's bonding provisions will be pursued as needed to enable an early construction program for the highway projects.

The specific projects proposed for local sales tax funding are:

- o Route 52 Extension - Route 52 is a 4-lane freeway in the south University City area connecting I-5 and I-805, with a 5.5 mile extension to Santo Road in Tierrasanta now under construction. A total of \$240 million is required to further extend Route 52 as a 4-lane freeway an additional 8.6 miles to Route 67 in Santee. The Route 52 project will provide improved east-west travel service and significant traffic congestion relief to the I-8 travel corridor and numerous community-serving arterials. CALTRANS is nearing completion of their route location and environmental studies for the Route 52 project. This high priority project should qualify for partial state and federal funding and be ready for early construction with Proposition A funds.
- o Route 54 Widening - The 5.0 mile section of Route 54 from I-805 in National City to the Spring Valley area is currently a County maintained roadway referred to as the South Bay Freeway. The high traffic volumes and safety

TABLE 2

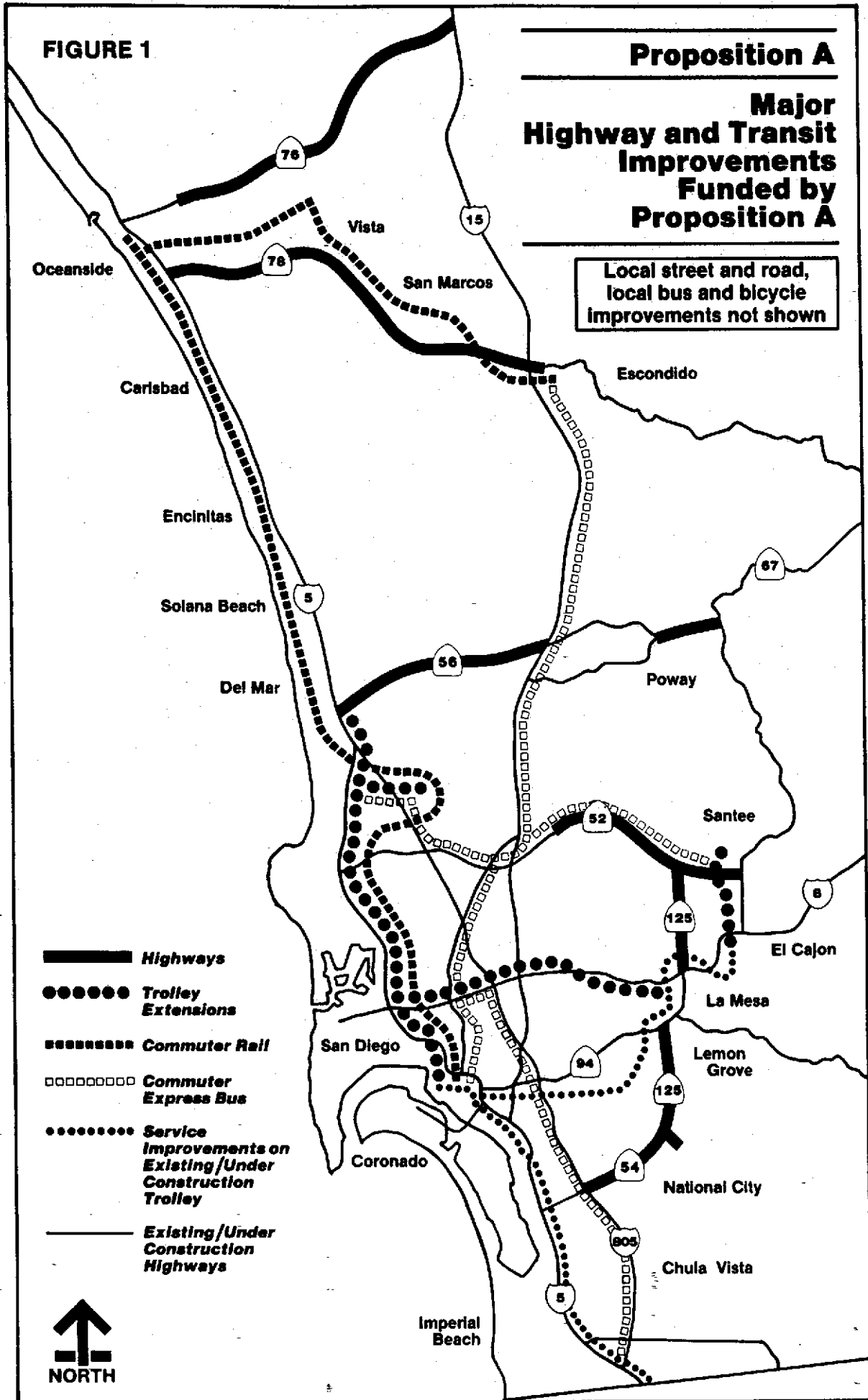
**PROPOSITION A EXPENDITURE PLAN
MAJOR HIGHWAY PROJECTS
(Funds in Millions of 1987 \$)**

<u>Project</u>	<u>Miles</u>	<u>Total Cost</u>
o Route 52: Construct an initial 4-lane freeway from Santo Road in Tierrasanta to Route 67 in Santee.	8.6	\$240
o Route 54: Widen South Bay Freeway to 8 lanes including Route 125 interchange and connector to San Miguel Road.	5.0	\$90
o Route 56: Upgrade an initial city arterial to a 4- and 6-lane freeway between I-5 and I-15, with no Proposition A expenditures in a designated "future urbanizing" area.	9.0	\$65
o Route 56: Widen the Poway Road grade to 4 lanes from Espola Road to Route 67 in Poway. (Cost-sharing project)	2.7	\$10
o Route 76: Widen to 4 lanes from Frontier Drive in Oceanside to I-15.	14.6	\$100
o Route 78: Widen freeway to 6 lanes from I-5 in Oceanside to I-15 in Escondido.	16.5	\$40
o Route 78 Corridor Reserve: Reserve for highway-related interchange and arterial improvements and additional Route 78 widening.	—	\$40
o Route 125: Construct an 8-lane freeway between Routes 54 and 94 in the Lemon Grove/Spring Valley area.	3.5	\$90
o Route 125: Construct a 6-lane freeway from Fletcher Parkway in La Mesa to Route 52 in Santee.	3.8	\$135
o Project Reserve Fund: Route location, right-of-way protection, environmental fund.	—	\$25
TOTAL COST:		\$835
Proposition A Funding:		\$750
Federal/State/Local/Private Funding:		\$85

FIGURE 1

Proposition A
Major Highway and Transit Improvements Funded by Proposition A

Local street and road, local bus and bicycle improvements not shown



- Highways**
- Trolley Extensions**
- Commuter Rail**
- Commuter Express Bus**
- Service Improvements on Existing/Under Construction Trolley**
- Existing/Under Construction Highways**



concerns warrant its immediate widening and improvement. A total of \$90 million is required to widen Route 54 to a full 8-lane divided freeway with interchanges at Reo Drive, Woodman Avenue, Briercrest Road, and future Route 125. The Route 54/125 interchange would include a connection to San Miguel Road to connect to the Route 125 local arterial being constructed in the Chula Vista area. Route 54 would provide needed congestion relief to the heavily traveled Route 94 while improving South Bay to East County travel.

- o Route 56 Upgrading - Route 56 is a proposed 9-mile, 4- and 6-lane freeway connecting I-5 at North City West with I-15. Route 56 is the only proposed east-west freeway in the 22-mile gap separating Routes 52 and 78. The route, which is now scheduled for initial development as a locally funded arterial, provides needed relief to many congested arterials including Miramar Road, Mira Mesa Boulevard, Del Dios Highway, and Route 78. A total of \$65 million will be required to upgrade the initial city arterial to a full limited access freeway. No Proposition A funds will be expended on this project within the area designated by the City of San Diego as "future urbanizing."
- o Route 56/Poway Grade Widening - The 2.7 mile portion of Poway Road from Espola Road to SR67, known as the Poway Grade, is currently a 2-lane local arterial within the City of Poway. The Poway Grade and other existing and planned streets in the Cities of Poway and San Diego parallel the adopted alignment of Route 56 between I-15 and SR67. If these streets are upgraded to state standards, they would constitute a traversable state highway and would be recommended by CALTRANS for adoption by the CTC as a state highway with CALTRANS assuming operations and maintenance. The widening of the Poway Grade to four lanes would provide relief for traffic congestion and safety concerns. The total cost of the project is estimated at \$10 million. The project is designated as a cost-sharing project, with funding to be shared between Proposition A highway funds and local street and road funds from affected local jurisdictions.
- o Route 76 Widening - Route 76 is a 2- and 4-lane conventional highway connecting I-5 in Oceanside with I-15 through the Bonsall area. The 2.9 mile Route 76 Mission Avenue bypass project from I-5 to Frontier Drive is scheduled for construction as a 4-lane expressway in 1989-90. A total of \$100 million is estimated to be needed to widen the remaining 14.6 miles of Route 76 to a full 4-lane highway from Frontier Drive to I-15. The project will improve travel service and safety along Route 76 and also reduce traffic and congestion on Route 78.
- o Route 78 Widening - The existing 16.5 mile, 4-lane freeway connecting I-5 in Oceanside and I-15 in Escondido is the major east-west highway serving the entire North County area. Growing recurrent congestion along Route 78 warrants its immediate widening to a 6-lane freeway. A total of \$40 million is estimated for the basic 6-lane Route 78 widening project. The Federal Aid Highway Act of 1987 provided \$15 million in federal demonstration project funding for Route 78 widening. The measure would provide the required local matching funds for the federal demonstration project funding.
- o Route 78 Corridor Reserve Fund - An additional \$40 million corridor reserve has been identified for highway interchange and arterial improvements. These reserve funds would cover high priority interchange improvements and addi-

tional widening of Route 78 as needed beyond the basic 6-lane widening project. Other eligible projects could include arterial improvements that provide relief to Route 78 traffic and congestion. The priority projects will be identified in SANDAG's current Route 78 Corridor Study project. Specific projects would require Commission approval through the Expenditure Plan update procedures.

- o Route 125 South Inner Loop Construction - A total of \$90 million is required to construct the 3.5 mile section of Route 125 connecting Routes 54 and 94 as an 8-lane freeway in the Spring Valley-Lemon Grove area. This portion of the South Inner Loop would connect with the Route 54 South Bay Freeway widening and provide major traffic congestion relief to Route 94 and existing Sweetwater Road. CALTRANS currently owns about 42% of the needed right-of-way and hopes to resume environmental studies in the near future.
- o Route 125 North Inner Loop Construction - The major I-8/SR125 Grossmont Summit interchange project now under construction in the La Mesa area will include a northern Route 125 connection to Fletcher Parkway. A total of \$135 million has been estimated to further extend Route 125 about 3.8 miles northward from Fletcher Parkway to future Route 52 in Santee. The 6-lane freeway is part of the North Inner Loop and would reduce congestion on I-8 and improve travel service in the La Mesa, El Cajon, and Santee areas. CALTRANS owns about 50% of the required right-of-way and is currently updating the environmental documents for the project.
- o Project Reserve Fund - The measure identifies a project reserve fund of \$25 million to be used exclusively for needed route location studies, right-of-way protection, and environmental analysis to support the proposed major projects. These reserve funds could also be used as local matching funds to maximize any other available local, state, or federal highway funds that might become available. Specific projects or programs would require Commission approval through the Expenditure Plan update procedures.

Implementation Process and Responsibilities: All of the major highway projects proposed for funding under the measure are designated as future state highway routes that would be under CALTRANS ownership and operation once constructed. To that extent, CALTRANS would be a lead agency along with the Commission in the development of the highway projects and overall project management. The Ordinance has been written to allow either CALTRANS staff or other public/private contractors to undertake the required project development activities. The project development activities include the required route location and environmental studies, preliminary and final design engineering, right-of-way acquisition, construction inspection, and project related contract administration. CALTRANS as the eventual owner-operator of these state highways would be jointly responsible with the Commission for approval of project designs, oversight of construction inspection regardless of who actually conducts the work. This action is necessary to insure that the projects will meet CALTRANS standards for design and construction and will be accepted into the State Highway System upon their completion.

The Ordinance includes a safeguard to insure that the San Diego region continues to receive a fair share of all other state and federal highway funds. The safeguard requires the Commission to annually certify that CALTRANS and the California Transportation Commission are providing the San Diego region its fair share of

state and federal highway funds and further that the state has not reduced any highway fund allocations as a result of the addition of the local revenues from the measure. The certification must be made prior to the allocation of any revenues from the measure for highway projects. The California Transportation Commission, CALTRANS, and the Legislature have all supported local sales tax programs to fund needed local highway projects that would otherwise go unfunded. They have all indicated that state and federal highway funds will not be reduced in any sales tax counties and further that such local revenues would provide an incentive to increase other state and federal highway funding in those areas. The California Transportation Commission has recently approved a policy that gives priority consideration in the allocation of any new additional state or federal highway funds to those areas with local sales tax funding of highway projects.

The actual scheduling of the highway project work would be done by the Commission each year as part of the Regional Transportation Improvement Program (RTIP) process and through the biennial updates of the Expenditure Plan. The RTIP will schedule by year all the major highway work activities including engineering, right-of-way acquisition, and construction. When each project will be constructed depends on a number of factors including:

- o The actual time it takes to deliver each project from preliminary engineering through construction.
- o The actual amount of revenues from the measure available each year for highway purposes.
- o The availability of CALTRANS or other public/private contract staff to do the required project development work.
- o The necessity for highway system continuity with early construction of usable highway segments which provide the greatest traffic service.
- o The desire to provide a balance of construction activity in all parts of the region.

The Commission is committed to undertake all the identified highway projects in the Expenditure Plan in the most timely, cost-effective manner possible, consistent with the project phasing identified in the RTP. At the same time, each project shall be subject to all pertinent project development activities to insure that the recommended projects provide the most public benefit with minimal negative impacts and all appropriate mitigations. The Commission will also most likely pursue the use of bonding as needed to enable early construction of the most important projects.

Public Transit Improvements

Proposition A will provide \$750 million for improvements to the region's public transit system, including extensions to the region's trolley system, the provision of commuter rail services, the implementation of new or improved express bus, local bus, rail, and dial-a-ride services, and the initiation of a new reduced price monthly transit pass program for seniors and the disabled and a monthly youth pass for students 18 years of age and under. The major projects proposed for funding in the Expenditure Plan have been drawn from the SANDAG Regional Transportation Plan

(RTP) and would be implemented in a manner consistent with the project phasing identified in the RTP. The projects also are consistent with the transit improvements recommended in the adopted Regional Air Quality Strategy. All projects and services will meet applicable state and federal accessibility requirements. As in the case of the major highway projects, the major rail capital projects are anticipated to be funded through the use of the bonding provisions of the measure as needed to provide for the earliest possible construction of these important projects.

Regional Transportation Plan Recommendations for Public Transit: The RTP recommended the implementation of a 106-mile system of trolley and commuter rail improvements over the next 20 years, as well as a near doubling of the level of bus service to provide both a high level of feeder service to the new rail services and improved express bus services in corridors where rail services are not currently planned. The proposed rail and bus improvements are expected to result in a tripling of transit ridership and will provide critically needed additional capacity in heavily congested highway corridors. Proposition A will provide the funding needed to implement the highest priority regional transit improvements.

The estimated costs of providing the capital improvements recommended in the RTP, as well as the costs of operating the region's transit services over the next 20 years, are estimated at \$3.5 billion. The best estimates of existing federal, state, and local revenues sources indicate that roughly \$2.45 billion can reasonably be expected to be available over the same 20-year period, leaving a funding shortfall of \$1.05 billion. Of the current transit funding sources, the sources of operating revenue — primarily fare revenues and local Transportation Development Act (TDA) funds — have been and are expected to continue to be the most stable and predictable. The sources of major capital support from federal and state programs have been subject to wide fluctuations in the past and are currently declining. With the current emphasis on reducing the federal budget deficit (Gramm-Rudman, etc.), large amounts of federal discretionary funding are not expected to be available for the major rail capital projects proposed in the RTP.

Given these trends in federal, state and local sources, the emphasis in the Expenditure Plan for transit projects has been placed on the provision of the major capital projects — trolley extensions and commuter rail facilities — for which adequate funding is not expected to be available. Funding from the measure has also been included for bus, dial-a-ride, and rail service improvements to augment other sources of operating revenue.

Expenditure Plan - Public Transit Project Listing: The specific listing of transit projects proposed for funding is presented in Table 3. The projects are also shown on Figure 1. The major rail improvements proposed are built upon the existing South and Euclid lines of the San Diego Trolley, including the extension to El Cajon currently under construction using federal, state, and local funds. The revenues from the measure of \$750 million would be combined with \$190 million in federal, state, local, and private sector funding to implement the proposed improvements. The amount of funding for individual projects will vary depending on which projects qualify in the future for partial state and federal funding and on the amount of funding attracted from private developers and other local sources. Based on the Ordinance, after the allocation of 1% of the funds allocated for transit purposes to expanded dial-a-ride services, at least 80% of the transit revenues will be allocated for major rail capital projects and no more than 20% will be allocated for the reduced price monthly pass programs and new and expanded bus and rail services. The specific projects and services proposed for funding through Proposition A are:

TABLE 3

**PROPOSITION A EXPENDITURE PLAN
PUBLIC TRANSIT PROJECTS
(Costs in Millions of 1987 \$)**

<u>Project</u>	<u>Miles</u>	<u>Total Cost</u>
Old Town Line (Downtown to Old Town)	2.8	\$55
Santee Extension (El Cajon to Santee)	3.3	\$35
Coastal Corridor Commuter Rail Service (Oceanside to Downtown)	43.0	\$70
Mission Valley Line (Old Town to Stadium)	5.6	\$150
Mid-Coast Line (Old Town to N. University City)	12.1	\$130
North County Commuter Rail Service (Oceanside to Escondido)	22.3	\$60
Mission Valley Line-East Extension (Stadium to La Mesa)	6.0	\$150
North Coast Line (N. University City to North City West)	3.8	\$100
Project Reserve Fund (Right-of-Way Protection, Project Studies, Environmental Work)	--	\$40
Public Transit Service Improvements (Senior/Disabled/Student Pass, New & Expanded Trolley, Commuter Express Bus, Local Bus and Dial-A-Ride Services)	--	\$150
TOTAL COST:		\$940
Proposition A Funding:		\$750
Federal/State/Local/Private Funding:*		\$190

*An annual average of \$9.5 million over the 20-year period is expected to be available from federal, state, local and private developer sources. This is a conservative assumption of future fund availability from these sources. Since 1980, an annual average of over \$20 million has been available for major capital projects from these sources.

- o Old Town Line - a 2.8 extension from Downtown San Diego to Old Town following Pacific Highway and the Santa Fe railroad right-of-way. This extension provides the first leg of further extensions of the Trolley to the north and through Mission Valley. Funding from the measure for this project will be combined with state funds and City of San Diego Transient Occupancy Tax (TOT) revenues.
- o Santee Extension - a 3.3 mile extension of the El Cajon Line from the El Cajon Transit Center to the Santee Town Center area. It is expected that funding from the measure will be combined with state and federal funding to complete this project.
- o Coastal Corridor Commuter Rail Service - a 43.0 mile commuter rail service between Oceanside and Downtown San Diego using diesel-powered vehicles along the existing railroad right-of-way. The project would provide high quality rail transit service as an alternative means of travel in the congested I-5 corridor. Funds from the measure would be the primary funding source with potential state and federal support.
- o Mission Valley Line - a 5.6 mile extension from Old Town to San Diego Jack Murphy Stadium serving the Fashion Valley and Mission Valley Shopping Centers and other activity centers in the Mission Valley area. Substantial funding from private sources through the City of San Diego facility benefit assessment program is anticipated to augment revenues from the measure and other funding for this project.
- o Mid-Coast Line - a 12.1 mile extension from Old Town to the North University City area along the I-5 corridor serving UCSD and the Golden Triangle area. The project includes a proposed spur along Executive Drive to provide a connection with the proposed commuter rail service to North County. Private sector funding, combined with funding from the measure and other revenues, is expected for this project.
- o North County Commuter Rail Service - a 22.3 mile commuter rail service between Oceanside and Escondido along the existing railroad right-of-way using diesel-powered vehicles. This project would provide rail service to all the communities along the State Route 78 corridor and a focus for all transit service improvements in the area. Potential federal, state, and local support would augment revenues from the measure as the primary funding source.
- o Mission Valley Line East Extension - a 6.0 mile extension of the Mission Valley Line from San Diego Jack Murphy Stadium to La Mesa, serving SDSU and connecting with the El Cajon Line at the Grossmont Center station. This project will provide a complete rail loop in the metropolitan San Diego area by connecting the East Line and Old Town/Mission Valley lines. Revenues from the measure would be combined with other sources including private sector support for completion of this project.
- o North Coast Line - a 3.8 mile extension of the Mid-Coast Line from the North University City area to the North City West area along the I-5 corridor to the junction with proposed State Route 56. This line would provide additional capacity through the heavily congested I-5/I-805 interchange area. Private

sector funding and other revenues would be combined with funding from the measure for completion of this project.

- o Project Reserve Fund - a contingency fund of roughly 5% of the funds available for transit purposes through the measure would be set aside for future uncertainties. These funds could be used for right-of-way protection for future facilities, project studies, and environmental studies, assessments, and related work. Up to \$1 million of these funds will be used to conduct a two-phase study of trolley extensions in the South Bay, with the first phase being a feasibility analysis of alternative extensions followed by a more detailed environmental evaluation and alternatives analysis of the extensions found feasible. These funds also could be used to provide local matching funds to maximize other available funding. Specific projects or programs would require Commission approval through the Expenditure Plan update procedures.
- o Senior/Disabled/Student Passes - a reduced price monthly transit pass program will be established for seniors (60 years of age and older) and the disabled at 25% of the regular monthly pass price and for students (18 years of age and under) at 50% of the regular monthly pass price.
- o Commuter Express Bus Services - a network of new or expanded commuter express bus services will be developed to provide high quality transit services in those corridors where trolley or commuter rail extensions are not planned. These services will be designed to provide the same high speed, reliable, and comfortable service offered by the San Diego Trolley. These services will include a significant expansion of express services in the I-15 corridor between Escondido and downtown San Diego to utilize the high occupancy vehicle (HOV) lanes now under construction, as well as new express services between the South Bay and the North University City area along the I-805 corridor and between East County and North University City along the Route 52 corridor. These and other express bus services will be developed and refined by the Metropolitan Transit Development Board (MTDB) and the North County Transit District (NCTD) through the short-range transit plan process.
- o Other Transit Service Improvements - additional rail and bus services will be provided including new and expanded service, such as route extensions and more frequent operation of heavily patronized routes. Such improvements will include frequency improvements and other service enhancements on the existing South and Euclid Lines of the San Diego Trolley, as well as on the extension to El Cajon currently under construction. These services will be developed by MTDB and NCTD in their short-range transit plans.
- o Dial-A-Ride Services - an amount equal to 1% of the funds made available for transit purposes by Proposition A will be used to expand the dial-a-ride programs providing services to seniors and the disabled throughout the urbanized portion of the region. These funds would be used to augment the Transportation Development Act (TDA) Article 4.5 funds currently being used to support these systems. Additional funding is urgently needed by the dial-a-ride operators in order to meet growing demand for these services.

Implementation Process and Responsibilities: As specified by SB 361 and the Ordinance, the revenues made available for public transit purposes will be allocated to the Metropolitan Transit Development Board and the North San Diego County

Transit Development Board (North County Transit District - NCTD) for transit purposes consistent with the RTP and the Regional Transportation Improvement Program (RTIP). The revenues will be allocated annually to MTDB and NCTD on a population basis. MTDB and NCTD will be responsible for the implementation of the public transit projects and programs as approved by SANDAG through the RTP and RTIP.

The Ordinance specifies that the Commission (SANDAG) shall annually approve a biennial Program of Projects to be funded during the succeeding two fiscal years with the revenues made available through the measure. This program of projects will be prepared as part of the five-year RTIP process. MTDB and NCTD will develop and submit to the Commission a proposed program of projects. After a public hearing, the Commission will take action on the program of projects.

Bicycle Facility Improvements

Proposition A will provide \$1 million per year for bicycle facilities throughout the region. The SANDAG Regional Transportation Plan contains a recommended regional bikeway system and supports the continued development of improved bicycle facilities to provide an effective alternative to auto travel. Improved bicycle facilities also are a major element of the adopted Regional Air Quality Strategy.

Currently, the primary funding source for bicycle improvements is the bicycle and pedestrian fund provided by the Transportation Development Act (TDA). In fiscal year 1987-88, \$935,500 is available for bicycle improvements through this program. Each year, the SANDAG Bicycle Facilities Committee reviews claims for these funds and develops a priority list of projects to be recommended for funding by the SANDAG Board of Directors. Claims for eligible projects generally exceed the funds available by two to three times each year.

Proposition A would provide for a doubling of the funds currently available for bicycle facility improvements. It is proposed that the Proposition A funds be used to augment the available TDA funds, following the existing Bicycle Facilities Committee process to evaluate and prioritize the projects requested for funding by local jurisdictions. Any project submitted for funding would be required to be consistent with the Five-Year Regional Transportation Improvement Program and the Regional Transportation Plan. The increased funding for bicycle improvements provided through Proposition A would provide a major commitment towards the implementation of the region's air quality improvement tactics.

Local Street and Road Improvements

A total of \$750 million will be provided from Proposition A to improve the region's local street and road network. These funds will be used to reduce the region's backlog of local street and road maintenance and construction projects and provide for on-going maintenance and construction of each jurisdiction's highest priority projects. The local street and road program was based on an analysis of local street and road needs in the 1986 Regional Transportation Plan.

Regional Transportation Plan - Local Street and Road Needs Analysis: Currently, the region's 18 cities and the County of San Diego maintain about 6,400 miles of local streets and roads. During the past 10 years, nearly 90 miles of new streets

and roads have been constructed each year requiring increased funding for roadway maintenance. In 1975, it cost about \$17 million to maintain the 5,400 miles of local streets and roads. Today, we are expending over \$40 million annually just to maintain our roadway system. At the same time, gas tax revenues have not kept pace with either inflation or the region's growing travel needs. In 1985, the total gas tax receipts to the region's cities were only slightly more than half of what it cost just to maintain the existing city streets. In the last 25 years, the legislature has increased the gas tax for local streets and roads only once and that was only a one cent increase in 1983. The shortage of street and road funding has caused the cities to allocate more general fund revenues to the city street program than they received in gas tax funds. In 1985, local General Fund revenues (\$27.9 million) allocated to the city street programs were about 28% more than the state subvented gas tax revenues (\$21.9 million). At the same time, there is a growing backlog of deferred maintenance work and postponed new construction projects. The adequate and timely maintenance and expansion of the local street and road system is essential to provide safe and convenient travel throughout the region.

In 1986, SANDAG, through the region's Federal Aid Urban Advisory Committee, prepared a local street and road needs evaluation. The local street maintenance and new construction needs survey was completed by each jurisdiction summarizing the existing deficiencies or backlog of deferred projects and 10-year program needs. The following table shows the region's 20-year publicly funded street and road program costs which total about \$3.7 billion.

TABLE 4
20-YEAR LOCAL STREET AND ROAD COST SUMMARY
(In Millions of Constant 1985 Dollars)

	<u>Maintenance Reconstruction</u>	<u>New Construction</u>	<u>Total</u>
Current Backlog	\$165	\$390	\$555
1986-1995 Needs	945	660	1,605
1996-2005 Estimate	<u>1,040</u>	<u>500</u>	<u>1,540</u>
20-Year Total	\$2,150	\$1,550	\$3,700

The current backlog of existing deficiencies shown in the table includes those street related improvements needed now that have been deferred or postponed primarily due to a lack of adequate funding. The estimated \$555 million backlog includes \$165 million of deferred maintenance (patching, overlay sealing, street lights and traffic signals), critical rehabilitation and reconstruction work, and about \$390 million of postponed but currently needed new construction projects. Maintenance and reconstruction work represents about 58% of the 20-year costs (\$2.15 billion) with new public street construction constituting the remaining 42% program need (\$1.55 billion).

The local street and road program costs are only for the public agency component of the local street and road system. The costs for local residential streets built by

private developers and other transportation facilities funded through Facilities Benefit Assessment (FBA) programs or traffic impact fees are in addition to the public costs identified. The street and road program analysis assumes that new development will continue to be responsible for and provide those transportation improvements required by that development.

The projected public street and road revenues over the next 20 years total only about \$1.3 billion compared to program costs of \$3.7 billion. The estimated revenues assumed a continuation of the existing 9 cent per gallon state gas tax and existing distribution formula. The gas tax revenues increase over time based on projected motor vehicle fuel consumption but not as fast as inflation and real travel growth. It is also assumed that the projected local General Fund revenues to the city street program will remain at today's current levels. The existing levels of funding are clearly inadequate to provide for the region's local street and road program needs. Without more funds, the backlog of deferred maintenance and postponed new construction projects will grow larger with a resulting degradation in the street and road system. Continued deferral of needed maintenance work will result in more expensive major reconstruction problems in the future.

Proposition A will provide critically needed funding for the region's local street and road program. The revenues from the measure of about \$750 million over 20 years would be enough to eliminate the current backlog of deferred maintenance projects (\$165 million) and still allow for an increased local street and road maintenance program. The program will allow each jurisdiction to fund its most important public street and road projects that are now unfunded.

Expenditure Plan - Local Street and Road Element: Under Proposition A, one-third of the total revenues would be used for street and road purposes. There are three major elements to the measure's program for streets and roads. They include the distribution formula for allocating revenues to local agencies, the Ordinance requirements regarding eligible projects and other program requirements, and the process for selecting specific projects to be funded with sales tax revenues. Following is a description of the major elements.

Fund Allocation Formula: In early 1986, the region's Federal Aid Urban Advisory Committee, the Transportation Financing Advisory Committee, and the SANDAG Board of Directors, acting as the San Diego County Regional Transportation Commission, all endorsed a recommended formula for allocating any potential street and road revenues from a ballot measure among the region's cities and the County of San Diego. The distribution formula which is specified in the Ordinance is based on a 2/3 population - 1/3 miles formula, with a \$50,000 annual base funding level. The relative distribution of revenues between city streets and county roads under the formula approximates actual historic maintenance expenditures per mile of street and road. A \$50,000 annual base provides the smaller cities with increased project funding to enable a usable project to be undertaken, while maintaining an acceptable per capita level of funding. The formula also provides equitable funding for county roads in future years even if major incorporations or annexations take place. SANDAG would be responsible for providing updated population and maintained miles data each year for use in the following years' fund distribution formula. Any newly incorporated city shall be eligible to receive sales tax revenues beginning with the start of the fiscal year (July 1) following their incorporation. Population revisions due to annexations will also take effect at the start of the fiscal year following the annexation. Table 5 provides a sample breakdown of local street and road revenues by jurisdiction.

TABLE 5

PROPOSITION A EXPENDITURE PLAN
ESTIMATED LOCAL STREET AND ROAD REVENUES
(Thousands of 1986 \$)

Jurisdiction	1/1/86 Total Population	1/1/86 Maintained Mileage	1st Year Estimate FY 1989	5 Year Total FY89-93	20 Year Total FY89-2008
Carlsbad	48,872	146.4 mi.	\$ 710	\$ 3,660	\$ 17,570
Chula Vista	116,325	219.8	1,420	7,350	35,540
Coronado	19,462	40.6	290	1,470	6,920
Del Mar	5,097	22.5	130	660	3,000
El Cajon	81,752	183.2	1,060	5,460	26,370
Encinitas	48,564	138.6	690	3,580	17,200
Escondido	79,605	236.6	1,120	5,780	27,920
Imperial Beach	24,918	42.6	340	1,740	8,230
La Mesa	51,785	129.1	710	3,650	17,570
Lemon Grove	21,798	64.8	340	1,770	8,370
National City	55,408	90.9	680	3,520	16,930
Oceanside	96,553	278.2	1,330	6,890	33,310
Poway	37,947	127.1	580	3,000	14,380
San Diego	1,002,895	2,393.0	12,640	65,350	317,740
San Marcos	20,902	95.9	380	1,970	9,350
Santee	49,258	114.9	660	3,430	16,460
Solana Beach	14,241	40.8	240	1,230	5,760
Vista	46,746	148.4	690	3,570	17,170
County	344,041	1,886.3	5,980	30,920	150,220
Regional Total	2,166,169	6,399.7 mi.	\$30,000	\$155,000	\$750,000

REVENUE ESTIMATES FOR PLANNING PURPOSES ONLY

1. Assumes 1/2% local sales tax with 1/3 of revenues for local streets and roads.
2. Local street and road revenues allocated by following formula:
 - a. Each jurisdiction receives a \$50,000 annual base funding.
 - b. Remaining revenues are annually distributed on a formula based 2/3 on total population and 1/3 on maintained street and road mileage.
3. The revenue distribution would be updated annually using current population and maintained mileage data.
4. Local agency population based on January 1, 1986 population estimates from the Dept. of Finance (DOF). Encinitas and Solana Beach population estimates (1/86) from SANDAG.
5. Note: Totals may not add due to rounding of the estimated revenue to the nearest \$10,000.